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Television/Radio Age

HITS & MISSES

Only three new network entries seen as hits/35

CABLE COMES OF AGE

Nets aiming for Big 3's jugular vein/39

FOX HUNT

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Television/Radio Age

July 11, 1988

Volume XXXV, No. 25

Only three new series seen as potential hits; networks expected to finish in same order as before

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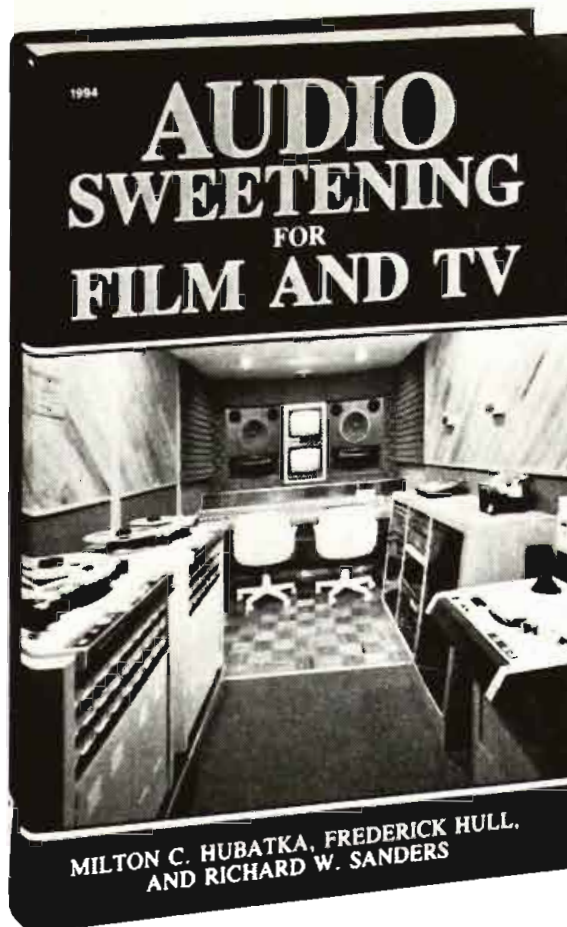
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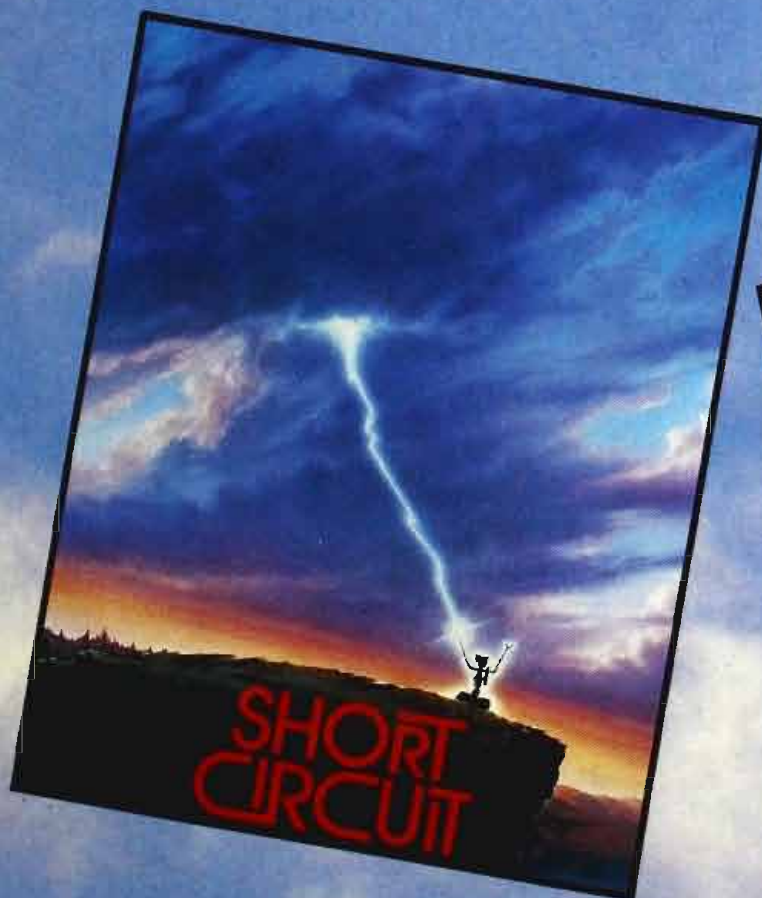
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Publisher's Letter

Network daytime cheapened by influx of 15-second commercials

A few years ago the most profitable segment of the broadcast schedule for the networks was daytime programming. But the daypart has deteriorated as a profit center as a result of the 15-second commercial drop-ins. As a matter of fact, at this point, 61% of the commercials on daytime television are 15 seconds in length.

The result is that the advertiser has a different perspective about daytime television advertising. Some of the largest advertisers now view daytime TV, with its saturation of commercials, as a great advertising medium that has gone bad. Many advertisers look upon these 15-second announcements as advertising that has lost its impact—advertising which can only be used as reminder copy. It is very difficult to sell a product in the short space of 15 seconds.

One major package-goods advertiser is even more direct. She stated caustically, "The networks have dissipated the effectiveness of daytime television by overcommercialization." Daytime is no longer a strong profit center for the networks. At the recent NBC affiliates meeting in Maui, Larry Grossman, president of NBC News, announced a new daytime plan starting in August to air 30-second national and international news headline reports every hour on the hour in the morning and on the half-hour in the afternoon. These breaks will probably be accompanied by a 15-second commercial. These eight additional breaks will be aired on the network between 10 and 3 p.m. When the plan was announced, there was not a complaint from the affiliates, meeting in closed session right after the announcement was made.

Meanwhile, the economic factors are volatile enough to give broadcasters cause for concern. The first three months got off at an aggressive pace—up 3.6% in Gross National Product. Some economists are forecasting that consumer spending will slow up. This, in turn, should slow inflation. Based on data for April and May, spending rose about 6.5%, close to the projection of 6.2% for the first quarter of 1988.

Public optimism. According to the Conference Board Consumer Confidence Study in April, the public started the second quarter far more optimistically than the first. However, the rate of spending was down from the first quarter during the second, after adjusting for price changes. Does this mean inflation will ease? *Business Week* economists aren't so sure, pointing to strong demand elsewhere.

The trade deficit apparently shows little signs of improvement. It would appear that the trade deficit is dragging the economy down. Economists observe that imports are causing most of the trouble. And despite price increases, foreign producers are still selling approximately as much product in the U.S. as they were a year ago.

This means, according to *Business Week* economists, export growth has to be unusually strong to make a significant dent in the deficit. Imports are still 28% higher than exports.

Our *TV Business Barometer* charts continue to show a close relationship between local and national spot. The first five months of the year, local was up 8.7% and national was very close at 6.6%.

Arj. Paul

Identify the famous relatives of these people

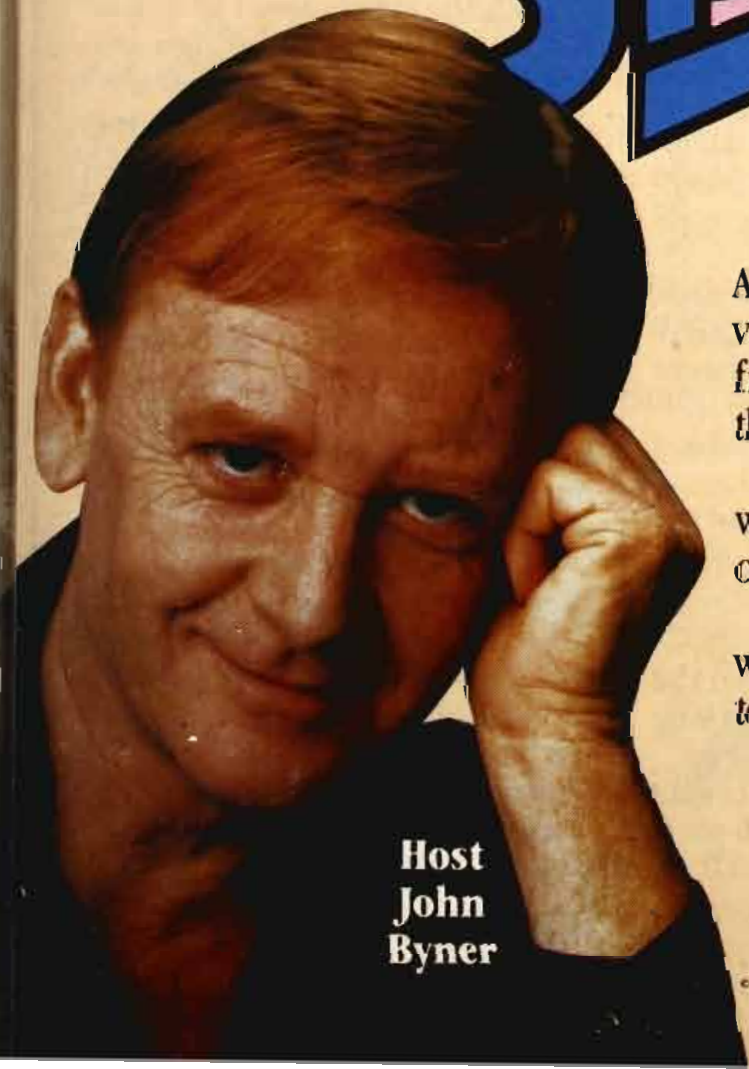


The identities of these people are revealed below.

ALREADY
CLEARED IN
68%
OF THE U.S.

and you're playing...

RELATIVELY SPEAKING



Host
John
Byner

All of these people are related to famous celebrities! And television viewers, with their insatiable curiosity about famous people, will find it absolutely irresistible to identify these unknown faces and their well-known relatives. In fact, it'll be habit-forming!

The show is RELATIVELY SPEAKING, an all new game show with lots of laughs, and it will be available as a half-hour strip on a barter basis starting Fall '88.

Experience the fascination we all have with the very famous by calling for a demo today. It's all so easy—relatively speaking!

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My check is enclosed for \$ _____

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Letters

More news good news

I read with considerable interest your story about our competitor, KNTV San Jose, Calif., changing their 6 p.m. hour newscast into two half-hours and adding a 15-minute morning newscast and additional updates (*News about news*, April 8).

I thought you'd like to know that here at KSBW Salinas, Calif., we embarked on a major expansion of our news effort last August: With the help of our Gillett ownership, we added three half-hour newscasts (at 6:30 a.m., 11:30 a.m., and 5 p.m.), to compliment our established hour at 6 p.m., and half-hour at 11 p.m. We also added a 6 p.m. newscast Saturdays and Sundays to go along with our 11 p.m. shows on both weekend days. Essentially, we doubled our newstime, and increased staff by 50%.

We might be the only station in the nation our size (110th market) making this type of news commitment—three hours per day.

So far the results are great: In February our 6 p.m. news (Arbitron) did an 11/23, while KNTV did a 4/7, and the other station in the market, KMST Monterey, did a 4/9. At 11 p.m., KSBW scored a 5/21, KNTV a 3/15, and KMST a 3/13.

Our new 5 p.m. show won the time period with a 5/13, beating KMST's established newscast, which fell to 3/8. KSBW's morning news at 6:30 a.m. scored a whopping 3/36, to KNTV's ABC morning news' 1/9 and KMST's CBS morning news' 1/7.

All in all, it looks like more news is good news, at least for KSBW and the Salinas, Monterey, Santa Cruz, San Jose viewers as well.

MICHAEL KRONLEY
News director,
KSBW(TV) Salinas-Monterey-Santa Cruz

Documentaries score

This epistle is long overdue, but the press of business and a week-long cold have set my schedule back.

I enjoyed the article concerning KTVU very much. It was well written and right on target. You'll be

pleased to know I received enormous feedback from fellow general managers and other members of the trade. It seems that TV/RADIO AGE is read extensively. Everyone enjoyed the article; I'm very appreciative of your interest and support. Hope you find it helpful and beneficial to your magazine as well.

There's more exciting news here on KTVU! On Sunday, April 10, we aired another documentary, *Nightmare at the Presidio*. It was extremely well done with tremendous viewer response, and the ratings, well, terrific! We delivered a 7 rating and 11 share at 9 o'clock against heavy network competition, peaking at an 8 rating and a 13 share. This is a wonderful number when you consider that *Our House* delivered a 6 and 11, *Super Carrier* an 8 with a 15, and *From Russia with Love* only a 12 with a 19.

KEVIN P. O'BRIEN
Vice President, general manager,
KTVU(TV) San Francisco-Oakland

North and south

I enjoyed reading the article about producer Lou Reda in the March 7 issue of TV/RADIO AGE. It was very interesting and informative, but there was an error. Mr. Reda is working with the Movietone News footage at the University of South Carolina in Columbia, not at the University of North Carolina.

With the assistance of USC staff, Mr. Reda will be producing a two-hour feature called *The Golden Age of the American Gangster*. This special, which will highlight nefarious gangster activities during the years 1919-34, will air in the fall. Reda and his associates, Don Horan and Norman Stahl, are filming the production in South Carolina. They are using USC's collection of Movietone News footage and have hired a number of USC staff members and students as production assistants.

Thank you very much for the opportunity to explain Mr. Reda's work at USC. *The Golden Age of the American Gangster* should be an exciting piece.

ERIN MacLELLAN
Cultural affairs editor,
University of South Carolina,
Columbia, S.C.

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At The Hartford, we know there's more to protecting your station than meets the eye. Or the ear. And we've developed a package of coverages that's attuned to the special needs of the broadcast industry.

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When a mobile unit hits the road, our coverage rides along—protecting not only the unit itself but also the permanently installed equipment inside and the portable equipment used on location.

If, due to a covered loss, your station is off the air, our business interruption liability is on the job. And should a piece of communications equipment fail, we don't offer garage sale value. Instead you get full replacement value for state-of-the-art equipment.

What's more, you can call us with anything from a claim to a policy change to a question and you'll get service, not static.

Now consider our price. Sure, business insurance is a necessary expense. But it doesn't necessarily have to be expensive.

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To improve your bottom line,
cut along the dotted line.

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Title _____

Company Name _____

Address _____

Phone _____

Expiration date for insurance _____
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The Hartford Insurance Group,
Hartford Plaza, Hartford, CT 06115



THE HARTFORD
The Insurance People of **ITT**

B-2

Big TV spenders are still good sports, according to Vitt's advertiser survey, but most see saturation level reached

Despite increasing doubts about the effectiveness of advertising on network TV sports events, Vitt Media International predicts that sports ad rates will continue to climb, especially on big events.

That, says Vitt, is due to the ongoing demand for such events as the Super Bowl, World Series and Olympics by "a minority of advertisers who believe they represent value" and "ideal forums for showcasing new ad campaigns."

The Seoul Summer Olympics, for example, now has topped the 90% sold plateau, says Pierson Mapes, NBC network president, despite the generally sluggish TV sales marketplace. That's up from 80% in May (TV/RADIO AGE, May 30) and totals about \$470 million in sales, according to some agency estimates.

As network execs like Robert Blackmore, NBC's executive vice president of sales, like to point out, those buying into the Super Bowl, World Series and Summer Olympics can count not only on boxcar numbers but attractive upscale male demographics—and some female too. Moreover, marketers can use the events to entertain key business contacts, from suppliers to retailers, and as the focal points

Ad demands for TV sports have been sluggish for three years.

for consumer and trade promotion tie-ins, Blackmore and others add.

Vitt Media's "Monitor" telephone survey on sports advertising was based on replies from 102 ad directors at leading consumer products and services companies—about half of whom oversee ad budgets of \$5 million to \$15 million, with the rest handling budgets above that level.

Sports advertising is "at or near the saturation level" and thus less effective, according to 64% of the Vitt respondents, with 9% feeling that point has already been passed. But 21% feel there is "still room for more."

About 44% see this sports saturation as a year-round problem, with 34% citing as most troublesome the fourth quarter—which this year will encompass pro and college football, post-season baseball and the Seoul Olympics.

Due to this sports clutter, Vitt



Hal Katz

says, 29% of its sample called sports advertising "less cost efficient" than other forms of advertising, whereas 17% called it "more cost effective" and 37% deemed it "about the same."

Advertising demand for TV sports generally has been sluggish for about three years, TV and agency execs agree. At the NBC affiliates convention, Robert Wright, NBC president, went so far as to say network sports have become "relatively a break-even business."

*NBC-TV reports
The Seoul Olympics
is 90% sold.*

About 73% in Vitt's poll wondered about the value of sports advertising, given the clutter and rising ad rates, notably in big events. Advertising in the Super Bowl and World Series was cited as of "questionable value" by 74% and 71% respectively. Moreover, 35% labeled the Summer Olympics as having "worse ad value" than other events, versus 56% who saw it as having comparable or better value.

What with the growing concerns from the ad community about TV sports' effectiveness, Vitt predicts "increased pressure will be placed on reevaluating the current payment contracts" between networks and organized sports. And Hal Katz, executive vice president at Vitt, which claims to be the largest independent media buying shop, forecasts greater use of cable sports as a way of marketers "pinpointing



New contract talks with major league baseball are scheduled for the coming months, and there's already talk about a cable/network partnership.

their target audiences" with more cost-efficiency than on network.

The recent bidding for the 1992 Winter Olympics quickly sparked a new debate about escalating sports' rights. The same was true a few years ago. After NBC won Seoul, CBS Sports president Neal Pilson lashed out at spiraling rights fees. This time, his NBC counterpart Arthur Watson said that CBS' \$243 million bid was among the "storm clouds" on network sports' horizon. He warned that, with weak network sales demand, promoters emboldened by that high fee could undermine network sports with outrageously high fees.

There already is network pressure to hold the rights money down as much as possible when the bid-

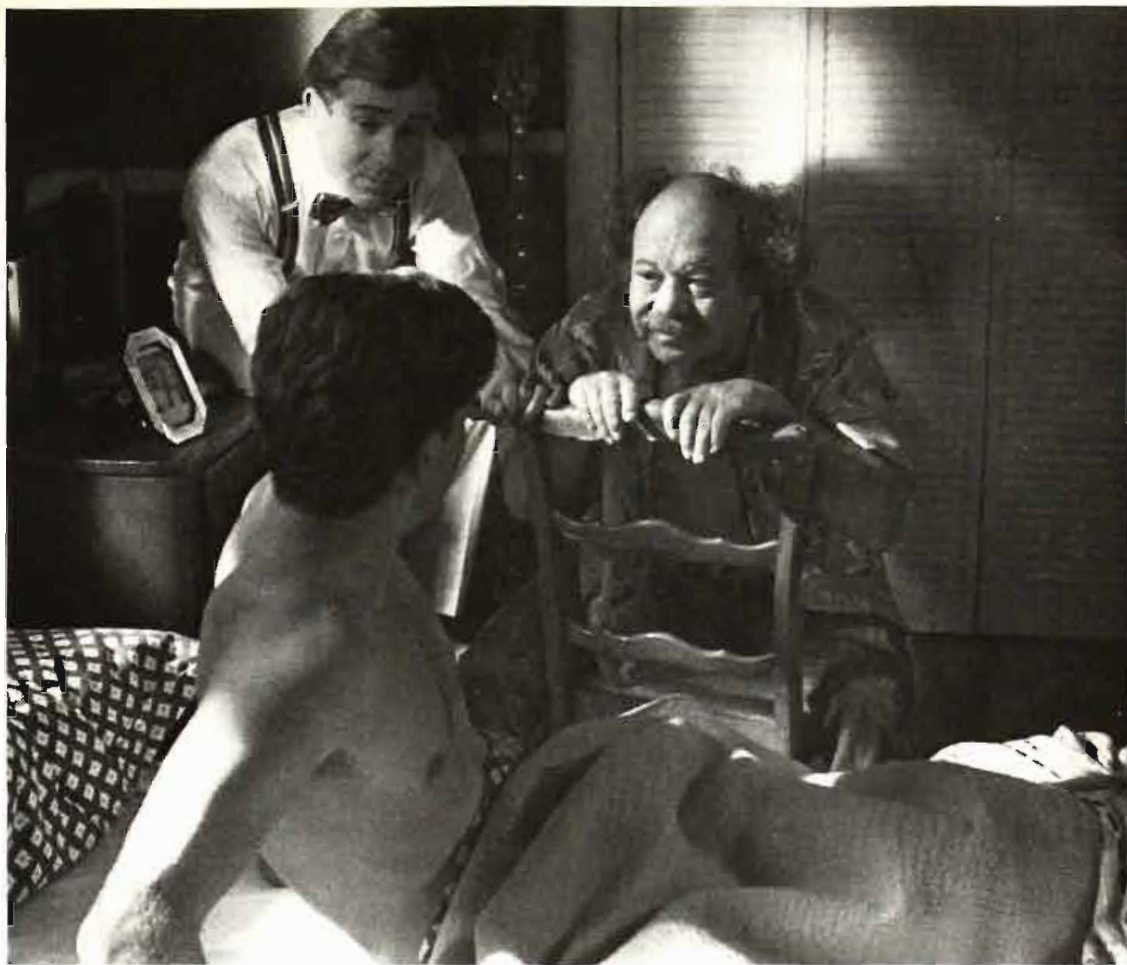
*Most question
the value of
sports ads
and predict
greater cable use.*

ding begins on the 1992 Barcelona, Spain, Summer Olympics. ABC already sought both the 1992 Olympics as a \$500 million package, but the IOC felt it could get more by keeping the two events apart.

Let's talk. Also due in the coming months are new contract talks with Major League Baseball and the National Football League. There are indications that cable—in the form of Turner Broadcasting, Home Box Office, ESPN and USA Network—will try to elbow into some or all three sports packages, either alone or in partnership with one of the Big 3. TV/cable links could be forged between CBS and TNT, ABC and ESPN and NBC and Tempo Television, some industry sources felt.

It's also possible, some said, that cable could be blocked out again, perhaps by means of exclusive two- or three-year, 10-digit deals with MLB and NFL. If true, it likely would be the last time cable would be excluded, they added. Baseball, now on two networks, could be split among the Big 3 like the NFL, some of these sources thought.—

Jim Forkan



Ralphie, guess what time it is? *This Selective Service TV spot is being released to stations this month as part of its campaign to get 18-year-old men to register.*

A 'Conscious Decision' for broadcasters

At a cost of \$200,000, the Selective Service System is rolling out a new series of public service announcements for TV and radio.

Titled "Conscious Decision," the PSAs remind 18-year-old men of the law requiring them to register with the agency within 30 days of their 18th birthday.

Since the Selective Service has no money to pay for the ad time, it relies on stations' goodwill to run the TV ads, which come in 60-, 30-, 20- and 10-second versions, and the radio spots, which come in 60- and 30-second varieties.

Because the Service is competing with other public service announcements, Uncle Sam is going the quality route with the relatively high-cost campaign.

Last year, at least 300 TV stations aired the spots, while about 11% of the nation's 6,700 radio outlets carried them.

The Washington-based ad firm of Henry J. Kaufman & Associates designed, produced and is distributing the spots again this year. Last year it did the whole thing—including some mailings and print ads—for \$380,000. Because of bud-

get cuts, the Service says, Kaufman is squeezing it out for \$200,000 (\$125,000 for the TV ads; \$50,000 for radio; \$25,000 for misc.). But the Service will distribute the spots itself in the top 30 markets.

Int'l Emmy awards open

The International Council of the National TV Academy is sending out entry forms for the 1988 International Emmy Awards. Programs originally produced for TV and initially telecast outside the U.S. between July 1, 1987 and June 30, 1988, are eligible.

The five categories include drama, documentary, performing arts, popular arts and children's programs. Programs entered in any other Emmy competition in the same year are not eligible.

Deadline for entries is Sept. 23, 1988. Winners will be announced at the 16th annual awards gala which takes place Nov. 21 at the Sheraton Centre in New York.

*(Final Edition
continued on page 14)*

Interactive Game Net eyes radio as one more facet of its gameplan

Interactive Game Network, supported by \$1.6 million in first-phase funding by major broadcast and cable interests, is now starting to take a look at radio as one more outlet for its technology, David B. Lockton, founder and president, disclosed in an interview with TV/RADIO AGE. "The opportunity just started to dawn on us," Lockton said. "We're going to get to them, but we haven't done anything about it yet."

The game plan in broadcast TV and cable for IGN involves such activities as call-the-plays contests in football and playing along with game shows, using a hand-held mobile device to respond to data transmitted on an FM subcarrier.

Lockton, noting the same device can be used for both radio and TV with no attachment needed, said sports and quiz interaction are also adaptable to radio. He added that radio stations could also go interactive for station promotion or advertiser contests.

With major players in the industry owning stock in the company, it would seem that they're serious

about coming through with interactive programming. These supporters include, NBC, Tele-Communications Inc., United Cable Television, Le Groupe Videotron, United Artists Communications, General Electronics and The Kagan Venture Fund. Lockton said he expects to firm up some programming agreements within the next few weeks.

Industry standard. Lockton noted the technology will be available industrywide, with investors having the principal advantage of "being able to look over our shoulders as we do the market research." IGN holds a patent on the overall approach and he noted that, even if a competitor could vary it significantly enough to get around the patent, "it's like stereo sound; once one standard is in use, the industry commits to that standard."

He sees his process easily taking hold because it does not affect the regular broadcast of a program, the in-home equipment is inexpensive, and it does not have telephone-line capacity limitations. The tele-

"This represents \$1-2 billion annually in gross profit for whoever handles distribution."

phone is used only at the conclusion of a game, he explained, to dump all the information—answers and the exact time the answers were given—into a packet network for ultimate delivery to IGN's computer central. For this, 50 cents would be charged on the player's phone bill, from which IGN would receive its only revenue. An additional 50-cent call may be involved to obtain information on how the caller performed against other players. Except for the likes of cable-delivered video games that appear on the TV screen, information fed to the viewer during a program would appear on the hand-held device's liquid crystal display.

The three tiers of activity to set IGN in motion, Lockton noted, are arrangements with the telephone companies, distribution of the consumer electronics, and programming.

Including applications outside TV and radio, Lockton estimated, this represents a \$5 billion annual business for the phone companies. He reported his company is working with all seven regional Bell Operating Companies, AT&T and three packet networks to set up systems for data collection and billing.

Home equipment. As for the home equipment, General Electronics, an investor and Hong-Kong-based consumer electronics company, has been engaged to produce the devices, which would go under the brand name of the U.S. distributor. Lockton said he has had discussions with Sony, RCA, GE and NEC regarding one of them distributing the device under its brand name, but he disclosed IGN is also considering taking over distribution itself by employing regional representation firms.

Why? "This represents \$1-2 billion annually in gross profit for whoever handles distribution. That's an awful lot of money to

April web TV billings up a little

Network TV billings continued relatively flat in April in the wake of a very heavy increase in Olympics billings in February on ABC-TV. The change in April was a plus 1.7%, following a 0.02% drop in March. April billings were \$755.5 million compared with \$743.0 million during the corresponding '87 month.

Primetime billings were off by a sliver—down 0.1% to \$423.9 million, but weekday daytime was down 16.2% to \$108.7 million. The strongest showing by far was during the weekend, with Saturday-Sunday daytime up 33.8% to \$94.2 million and Saturday-Sunday early fringe up 39.9% to \$21.7 million.

Network TV revenue estimates—April

Dayparts	Estimated (000)	% change
Prime	\$423,939.8	-0.1%
Mon-Fri daytime	108,742.8	-16.2
Mon-Sun late night	44,687.8	+16.7
Sat/Sun daytime	94,177.3	+33.8
Mon-Fri early morning	23,242.9	+2.9
Mon-Fri early fringe	38,994.7	-7.0
Sat/Sun early fringe	21,714.8	+39.9
Subtotal early fringe	60,709.5	+5.7
Totals	\$755,500.1	+1.7%

Copyright 1988, BAR

throw someone else's way." So IGN is weighing this against the risk and logistics involved. He added, "If we did it ourselves, we'd be able to control the advertising and promotion."

As for programming, he said, "Our cable investors feel the highest activity will flow to them" because of their narrowcasting approach. He added that an investor like TCI, the nation's largest cable operator, can be an effective salesperson in convincing the cable networks to supply appropriate programming.

Meanwhile, application to syndicated shows may be more limited, Lockton conceded, in that they couldn't have significant prize structures. Not being telecast live at the same time around the country would affect the security of the competition as well as logistics, he explained.

He said the home terminal probably won't be available for sale until next April, and then only regionally. "Our research shows one out of three homes would be likely to subscribe in the first year."

Chrysler, AT&T fully sponsoring two CBS minis

Chrysler Corp. will fully sponsor *Pancho Barnes*, a three-hour CBS-TV movie for the new season.

The drama is about the woman flyer Florence "Pancho" Barnes who helped prepare U.S. pilots for the World War I air war. Starring Valerie Bertinelli, the movie will be coproduced by Orion Television and Chrysler.

Meanwhile, ABC has *The Final Days* due as an AT&T Presents special this fall. This drama is based on the Bob Woodward/Carl Bernstein bestseller about the end of the Watergate-plagued Nixon Administration.

The TV networks' nonseries fare for 1988-89 also will include at least two specials cherrypicked from syndication. ABC is adding *The Mrs. America* pageant, while NBC has picked up wrestling's *Slammy Awards*. The former, 10 years in barter syndication, had been under discussion at ABC for more than a year.

TNT/WTBS package-only pitch: Is it ad dynamite or a dull thud?

Turner Network Television's "all or nothing" packaging with WTBS is being labeled a "smart move" by some top agency media executives. But some say it's smart mostly for Turner Broadcasting and that the agencies can still be smarter and get around the ultimatum.

At a New York luncheon to unveil TNT to the advertising community, advertiser and agency executives expressed mixed feelings on the package deal when queried by TV/RADIO AGE. One blue-chip advertiser exec asserted the all-or-nothing proposition was "outrageous," while some of the most sophisticated agency media executives noted they've been buying Headline News along with CNN all along and that this is the only logical way to launch the new program service.

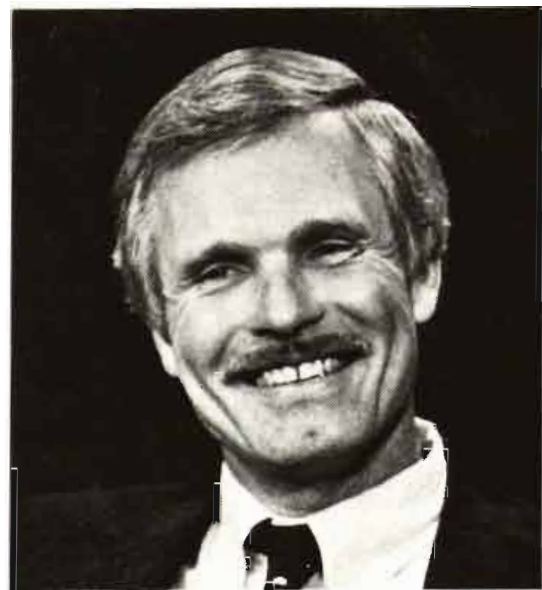
Still another agency media head stated that, when the buy has been big enough, he's been able to unpackage CNN from Headline News, despite stated policy, and expects to do the same with WTBS and TNT—on the basis of "supply and demand."

Not forever. Meanwhile, Lou LaTorre, senior vice president, advertising sales for Turner Entertainment Networks, told TV/RADIO AGE the new network, to debut Oct. 3, will be sold in concert with WTBS in a given selling period

Supply & demand plus buying clout will break the TNT/WTBS package, says an agency exec.

"until such time as we run out of inventory." Half supported by per-subscriber fees to systems, TNT has only six minutes an hour to sell vs. 10 for WTBS. Long-term, he added, it will go it alone when "it becomes divergent enough to separate."

LaTorre noted WTBS will still be sold alone for programming not paralleled by TNT, such as sports,



Ted Turner: "Life is really a rerun—for some of you who have been married 20 years or better."

music videos and certain specials. He described the TNT add-on as a reach extension, packaging similar programming on the same day and daypart, affording little chance of audience duplication. He estimates, "In the first year, TNT will represent on the average 17% of the combined impressions of both services."

Speaking before the assembled agency and advertiser executives, Ted Turner said TNT will be sold against a guarantee of 7,200,000 households, "but I think it will be closer to 10 million, and I think we'll have 17 million 90 days" after the launch. He elaborated that the expectation in the first quarter of '89 is for a .6 rating on a 24-hour basis.

Per-subscriber fee to systems is 15 cents in the first year, 20 in the second and 25 in the third. Turner said that over the next three years, his company will reinvest 80% of its revenues in improving the network. In the first 15 months, he added, it will have one "major" event a month, then one every two weeks in the second year and one a week in the third.

One such major event was touted by "surprise guest" Donald Trump, who announced *The Donald Trump Story*, a two-hour stan-

(Final Edition continued on page 16)

TV stations get an earful about HDTV at NATPE-sponsored tech session

Television station executives were both hyped and warned about new technology in the high definition and digital areas by two production company owners at the recent International Teleproduction Conference and Exhibition in Los Angeles.

During a NATPE-sponsored session on new production technology, Kelvin Duckett, co-owner of year-old 525 Post Production in L.A., said stations should carefully appraise all the sales pitches for new technology equipment, since equipment becomes obsolete rather quickly. "Look down the road two years, he suggested.

Duckett, a videotape editor for nine years with ABC News before opening his own company, said the lead time in ordering and receiving a new piece of equipment, like the D-2 composite digital analog/digital videotape cassette recorder/player from Sony or Ampex, is one year. "That's outrageous," he said.

The D-2 system, which features a 208-minute cassette, costs around \$80,000, according to Duckett, whose company has ordered four units. It can hook into a station's existing editing equipment, and is a major step up from the D-1 system which only plays a 90-minute cassette and costs around \$160,000.

The problem with the D-2 is that it's incompatible with the European PAL analog playback equipment.

TNT: Dynamite or just a thud?

(continued from page 15)

za, will premiere on TNT. This puts builder Trump in company with both Michelangelo and Billy the Kid, who also will be subjects of TNT premieres.

Another "surprise guest" at the presentation was Vice President George Bush, who happened to be hanging around the Waldorf Hotel at the right time to put the finishing touch on the gathering with a few congratulatory words to Ted Turner.

Turner got an even better tribute from Manhattan Cable during the gathering—an announcement that it will launch TNT on its start date,

The catch is people are still watching on analog TV.

Ampex and Sony are so anxious to sell D-2s, they are "buying back C-format tape machines to get their D-2s installed," Duckett said.

The advantages for a TV station of a D-2 system are the three-hour capacity which allows a station to record bumpers, commercials, intros to shows and even shows themselves on one cassette.

"If you have sudden program changes, you can switch programs around. You don't have to rewind or unload a one-inch roll of tape." The catch is that people are still watching on analog TV monitors.

Duckett also cautioned TV execs if they use a production house they should be aware that not all companies have completely digitalized editing equipment. They have some capabilities, he said, so a station may sacrifice obtaining some effects for picture quality.

New camera. In discussing high definition TV, Barry Rebo, owner of Rebo High Definition Studios in New York, said on a recent trip to Japan he learned of the development by Ikagami of a new HDTV

camera, which is 10 times more light sensitive than the current model in operation with its 50 ASA.

The new camera, which should be ready next year, will open new areas of creativity, as well as reducing costs for lighting setups and the manpower required to work on a project, Rebo said.

His company has been doing HDTV commercials and music videos for two years, and most recently shot the first HDTV music concert with F&L Music for Sony. They constructed a 45-foot mobile unit with six cameras to shoot the two-hour concert by a Japanese artist, which will probably be leased by Sony to NHK for airing.

No downtime. Although Rebo admits current HDTV equipment has its problems, he claims he hasn't faced any downtime because of the technology. One problem, he did point out to station engineers, is the difficulty of focussing through the little viewfinder on the current camera. "If you're out of focus in HDTV, it's noticeable," he stressed.

Rebo emphasized the lead in HDTV technology in Japan, noting NHK will televise the Seoul Olympics to 50 select sites throughout the country. And he's aware of the cooperative efforts of nine major Japanese hardware companies working on a new half-inch VCR for industrial use which has high definition capabilities. This format will be out within a year, he said.

Rebo cautioned TV execs that high definition "is not required for a lot of things you now broadcast."

"Plotting our demise." Rebo noted that while attending the Western Cable Show last winter, he heard cable operators discussing the advantages of HDTV. "They were plotting our demise."

In working with the U.S.-supported 1,125/60 production standard, Rebo told station representatives that the economics of doing something in high definition "are competitive with standard commercial production" with the major benefits of outstanding picture quality. "People definitely see the difference dramatically between HDTV and a standard TV picture."

making it available to more than 230,000 influential Manhattan subscribers. In addition to TNT's six commercial minutes per hour, systems will have four minutes, where they typically receive two from cable networks.

Where WTBS has about 7,000 movies available to it, TNT will have some 2,000 and will concentrate on classics. Responding to comments on the heavy amount of rerun programming to appear on TNT, Turner jibed, "Life is really a rerun—for some of you who have been married 20 years or better."—

Ed Rosenthal

Arbitron, Nielsen do an about face on 'calibration'

Arbitron and Nielsen have made an about-face in their initial refusal to publish their own reports showing the differences between meter and diary TV ratings in the local metered audience reports. But the details of what they will report and the frequency of the reports still must be worked out with the Association of Independent Television Stations.

INTV has been campaigning for years for what the association calls "calibration." This is a code word for adjusting independent station diary ratings in diary-only markets to the higher meter levels that almost always pop up when a market is metered. But the large number of variables—such as type of program, daypart and number of indies in the market—and other factors have caused the rating services to resist calibration (see feature in June 27 issue of TV/RADIO AGE).

Earlier this year the two rating services offered to provide data on the meter/diary differences to INTV for the association to distribute. But the association resisted this solution on the grounds that it would seem self-serving and that the data should come out under the imprimatur of the rating services themselves. INTV president Preston Padden complained about the rating services' "wholly inadequate" responses in a speech last month to the annual convention of the Broadcast Promotion and Marketing Executives in Los Angeles.

The issue came to a head at INTV's annual general managers' meeting late last month in Washington. Both services made presentations to the group and, under the pressure of questions about meter/diary differences, separately agreed to distribute data to subscribers under their own imprint. However, nothing was decided on the format and frequency of the reports. The research services will not make any adjustments in ratings in diary-only markets.

Padden called the decisions by the rating services "a major breakthrough in INTV's ongoing campaign to address the problem.

ABC strikes up 'War' for November, so CBS may shuffle its miniseries; union may write but keep talking

The fall season has been in a state of confusion due to the Seoul Summer Olympics and the writers' strike. And last week ABC stirred the waters anew by indicating that it is changing signals and now will air the first 18 hours of *War and Remembrance* in the November sweeps.

ABC now seems to feel that the strike has so weakened the competition that its \$105 million "maxi-series" should easily dominate.

Previously ABC hinted that the 30-hour saga would bow in February and resume in the May sweeps. Now it appears the second chunk will run in February.

CBS miniseries. CBS had been targeting its eight-hour mini *Lonesome Dove* for November, but that could change in light of ABC's move. CBS already has its two-part *Jack the Ripper* miniseries penciled into October.

Upfront sales commitments for 1988-89 were expected to accelerate last week, following word that Paul Schulman Co. had completed its buy, chiefly for Ralston Purina Co. The only new-for-fall series bought by Paul Schulman, president of the network TV buying subsidiary of Advanswers Media Programming, were NBC's *Dear John* and *Empty Nest*, CBS' *Murphy Brown*, and ABC's *Saturday Mystery Movie*.

'Quite reasonable.' Though he declined to assess the upfront marketplace or the size of price increases, other agency buyers said they are in the 10% to high teens range, which is "quite reasonable," said one adman, recalling that the networks' starting positions a year ago were in the 60% range.

Schulman's buys begin before the late October target for the nets' official season start. The networks will have considerable first-run fare by then, he said, calling Brandon Tartikoff's announcement about recasting past British and U.S. series "a positive, aggressive move." (The NBC programmer had actually first indicated his

*Agencies say
upfront prices
in the 10% range
are "reasonable."*

plans in late May, though they did not get major press coverage until the strike entered its 17th week.)

Back to work? The possibility that the writers and producers may return to work while negotiations continue cheered many on the buying and selling sides last week.

Until now, admen like Richard Kostyra, executive vice president and U.S. director of media services at J. Walter Thompson USA, had fretted that September-October would be filled with not just series reruns and TV movies but also "a lot of pilots that don't deserve to be on the air."

Upfront should be wrapped up by the end of July, according to Tom Winner, senior vice president, William Esty Co. "Once it gets going, it moves fast." The majority of buys should be done by mid-July, said Paul Isacson, executive vice president at Young & Rubicam.

Given the soft marketplace and the agencies' position on holding rate hikes to a minimum, it seems unlikely that the 1988-89 upfront volume could approach last season's record levels, in the \$3.1 billion to \$3.2 billion range. "I'd be astonished if it'd be \$3 billion" this time, said CBS' Dominus. That, he said, would only mean a "more normal" season. A year ago, there was the traditionally high demand for an Olympics/election year, buyers and sellers agreed.

The outlook for daytime, meanwhile, remained bleak. Though some thought daytime upfront could begin this week, others like Schulman said daytime is so soft that if the pricing is not right, there could be quite a delay. According to Ogilvy & Mather's quarterly "Media Update" report, "Many experts see no increase or perhaps even a decrease in CPM in day network."

CNN's Hollywood bureau: A deadline every minute

Cable News Network's Los Angeles bureau was in journalism's gloryland when it produced the first three lead stories recently for CNN's major newscasts.

It was a good news day when the bureau covered the horrific fire at the downtown First Interstate Bank building, the explosion of a rocket fuel plant in Las Vegas and the extended lines of people waiting to apply for illegal alien amnesty on the final day of registration.

"I don't recall any bureau producing three in a row, except for stories of record from Washington," says Steve Shusman, the L.A. bureau chief. "We weren't trying to develop any special people angles; we were just trying to be competitive with everyone else."

The L.A. bureau, with its 70-person staff (including 10 technicians on contract from MVP Communications), ranks behind Atlanta, Washington and New York. Other CNN bureaus are in Chicago, Detroit, Dallas, Miami and San Francisco.

L.A.'s mission for the eight-year-old company encompasses feeding Atlanta with news and features for its three major broadcasts—(*Newswatch*, 5 p.m. eastern; *Pri-*



Steve Shusman, CNN's L.A. bureau chief heads a young staff.

menews, 8 p.m.; and the *Evening News* 10 p.m.—producing about half the stories which run in *Show Biz Today* weekdays 3–3:30 p.m. and *Show Biz Week* 9–9:30 p.m. Saturdays, and feeding *Sonya Live in L.A.* with psychologist Sonya Friedman weekdays noon–2 p.m.

Shusman says it costs "in the low millions of dollars" to operate the bureau—part of an overall operation which continues to lose money.

The L.A. outpost has four writer/on-camera reporters on the news

side, four writer/reporters in the show business unit, a reporter and producer in sports, a deputy bureau chief, four field producers, daily assignment editor, evening assignment editor, weekend assignment editor, librarian and researcher. Its one studio has three different setups and backdrops for use by guests for different programs.

It has one microwave equipped mobile unit, a master control and five editing bays, all of which are equipped to allow reporters working on late-breaking stories to do their voiceovers right there and to also feed their live reports through equipment in the control room up to the satellite via Bonneville, the uplink company located in the same Hollywood building.

Shusman, 38 and with CNN three-and-a-half-years, has been in L.A. three months as the replace-

"Because we're on the air 24 hours, we need to come up with a story that makes air right away."

ment for Dave Farmer, now New York bureau chief, who had replaced Robert Wiener, now the Jerusalem bureau head. Before coming to L.A., he had been CNN's supervising producer in Atlanta for the afternoon and evening newscasts, so he knows what kinds of stories headquarters wants. He also knows how to lobby. "If I tell Atlanta we've got a really good story and I don't see it on one of the two evening shows, I'll call or send a message on the computer to the executive producer or an individual, line producer and ask them to screen the story and find a place for it."

Nina Zirato, a field producer with CNN since 1982, including four years with the Rome bureau, was among the network's contingent covering the recent Moscow



Thomas Manheim, CNN's L.A. bureau assignment manager, talks with CNN producer Nina Zirato.

Summit. She was chosen by Atlanta for her expertise in setting up satellite feeds from overseas locations, Shusman points out.

In L.A. two years along with her husband, a CNN cameraman on the MVP Communications staff, Zirato had been with CBS News in New York for five years, so her experience level is above that of the other field producers in the office.

The biggest difference between working in L.A. and Rome, she says, "is here you tend to have people doing more specialized things. In Europe you produce, edit, do sound, voiceovers, and if a correspondent is held up someplace, be prepared to go live on the phone."

Locally she does a lot of background information gathering for the reporters in developing story themes. "After four years [in Rome], America is a culture shock. It really changed while I was away."

While she misses Rome, "I don't miss the terrorist beat. My husband would be in Beirut, and I'd be in Geneva."

The L.A. newsroom, as are all the other CNN offices, is linked by a specially-designed computer built by Basys Computers. "All the producers format their shows on the computer, the wire services go into it, and we use it to send messages to each other."

Sonya Friedman, host of "Sonya Live in LA."



While CNN may judge L.A. stories against those from the other outposts, CNN Headline News does use everything L.A. feeds, Shusman notes. The material is also used by a separate CNN Radio Network, which takes the audio, and with its own anchors, creates what Shusman calls a "hybrid mix" for the 275 domestic stations which carry the 24-hour service.

No leeway. Whereas the networks can give an L.A. reporter several weeks to pull together a reflective report on gang violence, Shusman doesn't have that leeway. "When I commit someone, I can give that person one day to come up with a story that's more than surface gloss. Because we're on the air 24 hours, we need to come up with a story that makes air right away."

There are instances when a story developed by the show business unit can also be used by the news desk in Atlanta.

Sandy Kenyon, at 32 the senior entertainment correspondent in

"The biggest pitfall for people who cover show business here is to want to be part of Hollywood. That's death."

L.A. and with CNN eight years, wound up doing that with Abbie Hoffman. One story had a political bent; the other covered his new stand-up comic career.

Kenyon does three one-minute Hollywood reports plus one piece a day for *Showbiz Today* and a week-in-review segment for the weekend. "I try to put a harder edge on my stories," Kenyon explains, adding, "I try to keep the hype to an absolute minimum. In doing a piece on the 'black pack,' with such people as Robert Townsend and Eddie Murphy I try to get the deal out of the way quickly to get to what the people are all about. What I want to avoid is using sound bites and film clips and saying, 'It's a great movie.' On the other hand, if you see a very exciting young talent, you might want to do a piece on them." He was impressed enough with



Sandy Kenyon, Hollywood reporter for "Showbiz Today."

Laura Dern, whom he saw in *Smooth Talk* and *Blue Velvet*, to seek her out. "Finding people like that," he says, "keeps you fresh." Jeff Panzer, formerly with *20/20* and now the entertainment unit's L.A. producer, was knocked out by bombastic rock singer Terence Trent D'Arby and did a piece, Kenyon points out.

Looking visual. What Shusman emphasizes he's trying to avoid "is finding a great story in *The Los Angeles Times* and saying, 'Let's do it.' We use a print story as research, as a reference point on stories we can take off on which gives us a feel of the pulse of L.A. in terms of what the movers and shakers are thinking and saying.

"We go after a television story which has to visually show people doing things and have them tell their stories in their own words. You have to go beyond saying gas prices are going up and explaining that Joe Smith may have to give up his car and use the bus. You also have to tell all the facts for the record.

"We do have to tell the straight story in order to be competitive with everyone else for page one. Page two for us comes later in the day when we show how people in a burnt-out building are thinking, 'Oh my God, what are we going to do? Am I going to get paid? Will I have another office?'" —**Eliot Tiegel**

Censors 'do it' to teen pregnancy spots but PSAs finally get on network TV

Those PSAs showing teenage mothers warning other girls that pregnancy can happen to them—no matter what their fast-talking boy friends say—didn't get on the networks the easy way.

Morton Lebow, associate director of public information of the American College of Obstetricians and Gynecologists, which along with the American Academy of Family Physicians is sponsoring the TV and radio drive, and Paul Brickman, executive vice president of Martin E. Janis & Co., the PR agency for the project, had to persuade the standards and practices people at the networks and agree to minor surgery on the spots.

Representing the networks were vice president Ralph Daniels and Jane Crowley of NBC, Andrea Garrison-Archie of ABC and Jane Ann McKettrick at CBS.

This is the fourth year of the program, and Brickman recalls, "In 1985, our first year, we were turned down by all three networks because we used the word 'contraceptive.'

The networks nixed the ads in 1985 because the word "contraceptive" was used.

So we dropped it in '86 and got on the air. Then this year some networks objected to our line, 'You can't get pregnant the first time you do it.' We had to cut out the words 'do it.' The daytime soaps can show the couple under the sheets making the whole bed bounce, but we can't say 'do it' in a commercial to try to stop so many kids from ending up as unwed mothers."

CBS response. At CBS, George Dessart, vice president, program practices, says his network "suggested a revision that they seemed perfectly happy to make." In Des-

sart's view, "There seems to be at least four distinctions between possibly suggestive material in a commercial or PSA and in a program.

"First, the commercial is not in context with anything that preceded it. In an ongoing serial the producers have a lot of time to develop a context that leads up to and into the action.

"Second, any one episode of a serialized drama appears once. Most commercials and PSAs are repetitive.

"Third, a commercial or PSA suddenly appears on the screen, unheralded and unannounced. Serials offer viewers plenty of opportunity to judge what's likely to happen in the next scene or two. That gives them the chance to decide for themselves whether or not they want to continue watching.

"Fourth, a commercial or PSA usually exhorts the viewer to take some sort of action, rather than merely presenting an action in the context of a well-developed story line."

Dr. Harry Metcalf, president of the American Academy of Family Physicians describes the campaign as "an attempt to talk sense to teenagers who have so much to lose."

The ad campaign cost about \$200,000 to produce in both English and Spanish.

PSAs aimed at reducing unintended pregnancies



I told myself if I wouldn't think about it, it wouldn't happen.



Now I think about it a lot.



He told me not to worry about it.



He didn't.

Sonnenberg new program chief at KTLA

Mark Sonnenberg, new KTLA(TV) director of programming, brings a strong background in program research with ABC Television to his new position.

"I've had the luck of being in programming research. Most research is heavily into sales," says the 30-year-old who started as a page with KTLA in 1978.

So it's a homecoming of sorts for Sonnenberg.

"Day in and day out I've analyzed what shows work and what shows don't, and what time periods are vulnerable," he adds. "I've looked at shows on the local and national levels, and since I'm going

(Sidelights continued on page 24)

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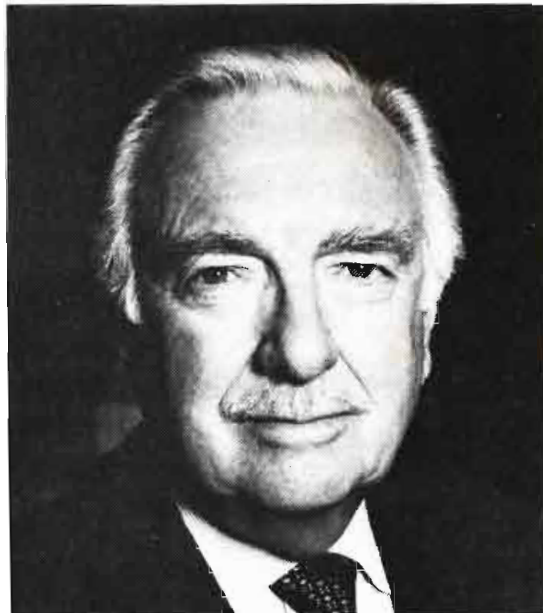
Measuring likable & negative qualities in network anchors an inexact science

Although NBC News' own qualitative research shows Tom Brokaw in a close battle with ABC's Peter Jennings in likeability—well ahead of CBS' Dan Rather—Marketing Evaluations' TvQ data on the news anchors tells a somewhat different story.

NBC conducted its own survey recently, while the Port Washington, N.Y.-based Marketing Evaluations did its survey in May '87; its 1988 report is being tallied and will reach subscribers by August. Details of the NBC News sample size were unavailable at presstime, but ME's 1987 data are based on 900 adults aged 18 to 49.

NBC News' survey also compared the Big 3 anchormen in terms of trust and fairness, areas Marketing Evaluations does not get into. The latter researcher instead concentrates on familiarity and likeability.

Both surveys also focused on



Walter Cronkite—*still the most liked, even when compared with the current web anchors.*

negative perceptions, but came to different conclusions.

NBC's consumer research showed Brokaw and Jennings lead-

The most disliked: 'negative Q' scores

1. Geraldo Rivera (synd.)	37
2. Charles Kuralt (CBS)	20
3. Ted Koppel (ABC)	19
4. Sam Donaldson (ABC)	18
4. Mike Wallace (CBS)	18
6. Connie Chung (NBC)	16
7. Tom Brokaw (NBC)	14
7. Dan Rather (CBS)	14
7. Harry Reasoner (CBS)	14
10. Walter Cronkite (CBS)	12
11. Peter Jennings (ABC)	9

ing Rather by about 10 points in trust, 15 points in fairness and 20 points in likeability/warmth. Neither Brokaw nor Jennings showed "any significant negative factors" in viewer perceptions, NBC also found.

In the TvQ data from last year, Brokaw led Rather and Jennings slightly in terms of being familiar to viewers, but all three were neck-and-neck in likeability. Only CBS News' veterans Walter Cronkite and Harry Reasoner outpointed the three anchors in likeability.

In the negative column, Marketing Evaluations found Brokaw and Rather tied at No. 7 among news people, well ahead of Jennings, the least disliked of the anchormen. (The TvQ news list excludes such people as Barbara Walters and Hugh Downs of 20/20, who are on its "hosts" chart instead.)

KTLA gets new program chief

(Continued from page 20)

to be pitched a lot of syndicated programming, I feel comfortable knowing what kinds of shows KTLA will benefit from."

Sonnenberg will work with KTLA's research department. "Research is a vital guideline in the program-making process. You have to go with gut feelings. It's a big part of the process. But you can look at how a show performed in another market if you're looking to make a schedule move and see if it was successful there."

Sonnenberg replaces Lisa Matas, now director of scheduling and acquisitions with Turner Network TV in Atlanta.

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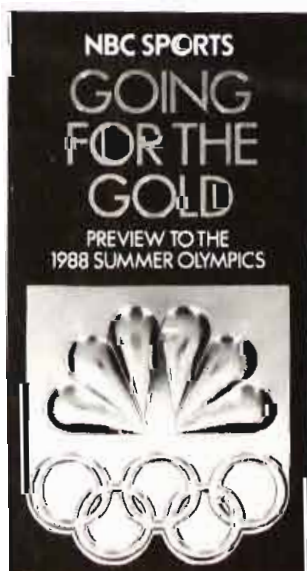
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TV Business Barometer

May spot TV up only 0.9%

With May figures in, the pattern for spot TV continues its downward spiral. Not that the monthly dollars are going down; May is one of the best months of the year traditionally. It's the monthly growth figures that are dropping.

The year started off with a hefty 14.9% increase in January, which set off all kinds of expectations even though the evidence is clear that the first month of the year is no augury of the remainder.

In any case, February showed a 9.5% increase, then March came in (not like a lion) with a 6.3% rise, followed by April with a 5.6% hike.

But the April performance was not a sign of a plateau because here comes May with only a 0.9% increase, the smallest monthly percentage figures in the *TV Business Barometer* annals since the beginning of 1985.

Total time sales in May were pretty healthy, close to \$600 million, the actual figure being \$594.8

million. That's below the \$612.9 million recorded for spot in April, which was a record high figure. The time sales total for May '87 came to \$589.5 million.

May is not only a good month for TV for seasonal reasons, but this May was a five-week Standard Broadcast Month (SBM). As has been noted, this affects mostly the smaller stations, a significant percentage of which report on an SBM basis. However, the larger part of the *Business Barometer* sample of stations report on a calendar month basis.

It so happens that May '87 was also a five-week SBM, so the year-to-year figures are comparable. Any way you slice it, May was nothing to brag about.

The cumulative total of time sales through May now stands at \$2,474.8 million, compared with \$2,322.3 million for the same period last year. That's a difference of \$152.5 million, or 6.6%.

The medium-size stations (those billing between \$7 million and \$15 million annually) showed the biggest percentage increase in May

among the three station revenue brackets. However, that was not particularly significant as differences among the three brackets were slight. The medium-size stations were up 1.5%, the larger stations up 0.8% and the smaller stations up 0.5%.

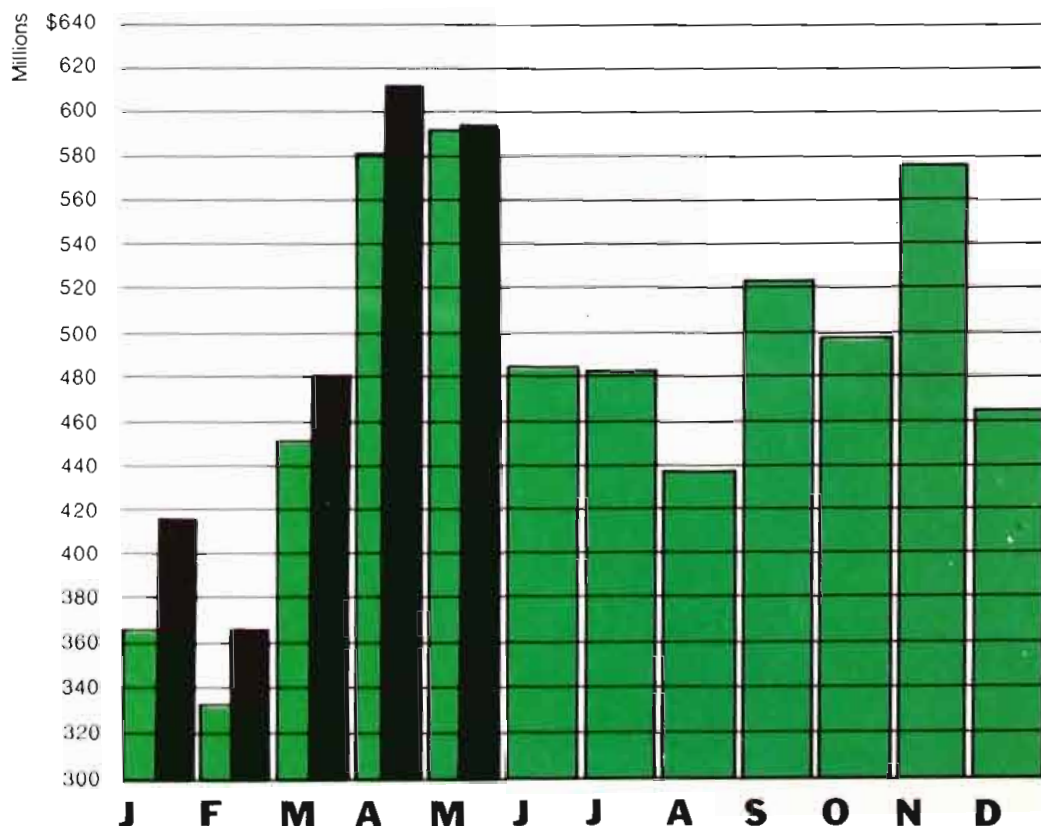
Revenue groups

For the first five months, there was not much difference between the three revenue groups in their rankings. Both the smallest and largest groups had the best increases during two months, were second once and third twice. The medium size station group was first once, second three times and third once. This is, of course, without weighting by month or taking into account the size of increase.

Considering that this is an Olympics/election year and there's no recession, the state of spot is going against all predictions, even taking into account the fact that this quadrennial year was not expected to be one of the better ones. In any case, the indications are that June figures will not turn out to be very exciting. Stations are asking, "Where did the business go?" And they don't know.

May

Network (millions \$)



National spot +0.9%

(millions)

1987: \$589.5

1988: \$594.8

Changes by annual station revenue

Under \$7 million	+0.5%
\$7-15 million	+1.5%
\$15 million up	+0.8%

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Satellites put copyright in never-never land

Perhaps by the time enough European viewers have satellite TV dishes or can receive cable, the whole issue of copyright infringement may be resolved. But for now it's one of those uncharted areas where the mines are not easy to detect.

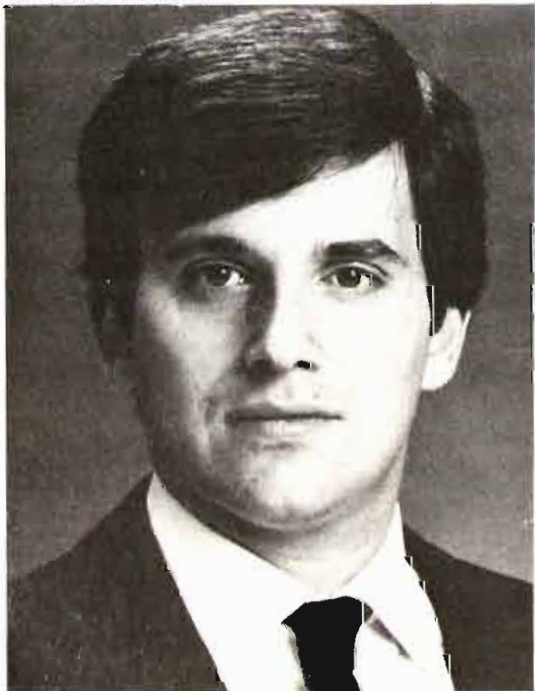
The next meeting of the European Broadcasting Union legal committee in October will consider the matter. Also, both the European Commission and the Council of Europe are looking at ways of dealing with satellite copyright, albeit it is doubtful there can be a consensus among European governments for an effective set of guidelines.

Some distributors, such as Lorimar's European senior vice president Stuart Graber, however, are confident that copyright will not stand in the way of selling to satellite channels. "We had a similar licensing problem when home video began," he says. "We adapted then and will again."

Others, perhaps because they are more directly involved at the moment, are more concerned. Disney's London-based managing director of sales, Edward Borgerding, says sales to satellite stations already are a problem. "I will not sell to any satellite channel that does not use a scrambled system," he declares.

While scrambling may be one

Stuart Graber



way of solving copyright problems, there are a number of people who argue that it tends to mitigate against the growth of direct broadcast satellites.

"The whole point of DBS," says Sat-1 legal advisor, Andreas Schardt, "is to reach the private consumer who buys a dish to receive the signal direct to the home. It would be senseless for DBS to be reduced to cable retransmission only."

Out of the bag. Borgerding, however, is particularly unhappy about Disney's difficulties with Italian state broadcaster RAI. As a backup in the event of microlink failure, RAI duplicates its terrestrial signal on a Eutelsat satellite transponder. As a result, complains Borgerding,

*Disney's upset
to see RAI bounce
its programs all
over Europe.*

"Disney programs, which we have sold to RAI, can be viewed all over Europe, not only by the tiny percentage of people who have their own satellite dishes, but by those who are on cable networks and are being fed it by cable companies which are retransmitting the signal without paying for it."

Although Borgerding acknowledges that the current RAI situation is not of great commercial significance to Disney because the programs are broadcast in Italian, a language not widely spoken in the rest of Europe, he does believe it is just cause for wariness in dealings with satellite channels.

Borgerding, on the other hand, cites the BBC, which also can be seen outside the U.K., as being a more honorable broadcaster. The Beeb, he points out, has deleted all Disney material and all films from the signal used by Danish and Norwegian cable operators.

One defender of RAI's practice is

European Broadcasting Union legal advisor Verner Rumphorst. He notes that the BBC is not using the satellite signal as backup for its terrestrial broadcast. If RAI were to delete feature films from its satellite signal, he explains, it would defeat the object of being on the satellite in the first place.

Unlike Borgerding, Rumphorst believes the RAI situation is unique and will not be repeated elsewhere. Nevertheless, he does concede that both RAI and the Italian government haven't done anything about distributor complaints because officials are in favor of Italians throughout Europe having the capability of seeing Italian television.

"RAI," warns Rumphorst, "will eventually have to acknowledge responsibility for this fringe audience and negotiate appropriate remuneration with distributors."

The money issue is at the heart of the copyright debate, and while Borgerding says for the time being there really isn't much Disney can do about its RAI problem ["It's not worth the loss of life to go to war!"], he also says the Disney situation has brought home the simple reali-

*"We had a similar
licensing problem
with home video.
We adapted then,
and we will again."*

ty of satellite broadcasting, the footprints of which cannot be confined to a simple geographic definition.

Keeping clients happy. Josh Elbaum, ITC international sales vice president, also is cautious. However, his reticence to deal with the new satellite channels stems as much from concern about offending normal terrestrial clients as from the copyright issue. Elbaum recognizes the importance that DBS will assume in the '90s but

asks, "Why go in now when two years from now all the wrinkles will be ironed out and it will be more profitable?"

While Lorimar's Graber believes the copyright question will be resolved before it gets out of hand, he's not unmindful of the consequences of signals spilling over into unlicensed areas. It is common sense, he argues, that broadcasters will not pay for programs which the public and cable operators can already receive in their country.

"The solution to that problem," says Graber, "lies partly in careful licensing. A sale can be well controlled, for example, if dubbing, rather than subtitling, rights are given so that people outside the given language area will be less inclined to exploit the overspill."

Lorimar will be going over agreements to protect both themselves and the producers they represent.

"It is time that rights owners got their act together."

Although EBU's Rumphorst recognizes the need for a neat set of rules, he's more pragmatic.

"The problems," he insists, "have been invented by people who like theories which do not always exist in reality. Very few people," he continues, "will watch a foreign language film when they have a choice of 20 in their own language."

Continues Rumphorst, "It is time that rights owners got their act together. The essential thing to remember is that the distributors have the legal right to authorize or prohibit transmission of a program."

For the first couple of years at least, after medium and high powered satellites are successfully launched in Europe, Rumphorst believes distributors should assume that their "illegal audiences" are negligible. Once there are significant audiences outside the licensed areas, he says, the distributors will be in the position to renegotiate their contracts to get the appropriate fees.

"You can't decide what color the baby's hair is," he chides, "before the baby is born."—**Irv Margolis**

'Europe 2000: What Kind of Television?' Mostly a fear of massive U.S. imports

Concern about the quality of programs to be shown on the forthcoming satellite channels is leading to the establishment of yet another committee to formulate a set of European standards.

Even the director of human rights from the Council of Europe, Peter Leuprecht, complained to delegates attending a recent Munich conference which espoused the new group, that "there already were enough talking shops." The visitors, however, were unmoved.

Carmen Fuente, one of the organizers of the conference—primarily called to consider a report, *Europe 2000: What Kind of Television?*, compiled by a task force chaired by former French president Valery Giscard d'Estaing—said she expected the European Television Forum to be operating within the year.

Although most committees of this nature generally portray themselves as being pro-European and try to find ways of fostering greater cooperation among the various European terrestrial broadcasters, they tend to start from an anti-American import base.

They fear that the new satellite channels will beam a series of uninterrupted U.S. programs into European households. In this particular case, the writers of the report specifically expressed their deep concern about U.S. incursions into Europe.

For his part, D'Estaing wrote that "television is too important to be left entirely to the marketplace."

In addition to American programs, the Forum will consider other topics covered in the report including ways of encouraging governments to support television and movies, including tax incentives, and the encouragement of European coproductions.

There are a number of European broadcasters who are convinced that the operators of the new satellite channels will saturate the continent with cheap U.S. imports. WDR International chief Horst Schering is one of them. In spite of some joint ventures with the Americans, Schering rejects the U.S.

contention that only fast-paced English-language programs are acceptable to commercial TV.

"This attitude," predicts Schering, "in the long run will put European money together for bigger and better projects. Soon the U.S. is going to have some very heavy competition."

Golden joins Saban Prods. as int'l chief

Stan Golden has left his job as president of Horizon International to join Saban Productions as head of its newly formed international division.

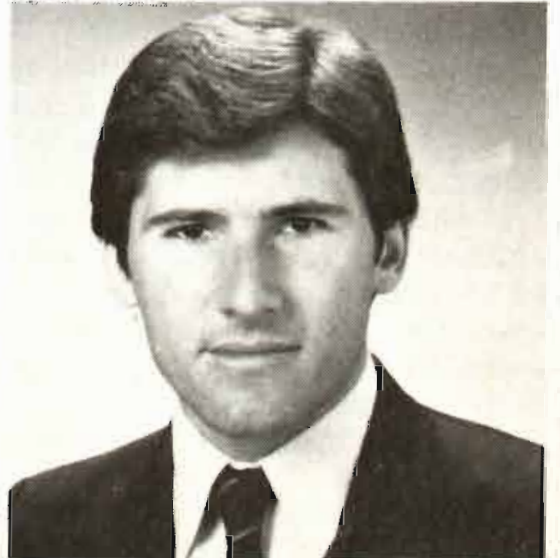
"We're not just distributing, we're also actively looking to acquire and coproduce programming," said Haim Saban, to whom Golden reports. Saban said the company has put aside \$10 million to fund acquisitions.

Saban International is now the exclusive distributor of all new product produced by DIC Enterprises, and already has locked up deals throughout Europe for two animated series, *Cops* and *Archies*.

Golden said the new company is particularly interested in animation coproductions. Usually coproductions involve miniseries, series and made-for-TV movies, so Golden is charting new waters here.

Joining Golden is Linda Leon as director of sales administration. She comes to Saban from DIC Enterprises.

Stan Golden



Radio Report

Widmann tops CBS Radio, as Hosking opts to retire early

Though there is a changing of the guard at the CBS Radio division, with Nancy C. Widmann succeeding Robert L. Hosking as president, both executives agreed one thing will remain the same: This will be "a good year for radio."

Widmann, who noted she has "spent my entire career in radio," sees her main priority as clearcut: "To maximize sales and maximize profits." Toward that end, she anticipates no changes in personnel.

A past chairman of the New York Market Radio Broadcasters Assn., she foresees spot and local radio as



Nancy Widmann

Bob Hosking

particularly strong in 1988. The station group consists of "some extremely strong markets, like New York and L.A., and some not so strong, like Dallas-Fort Worth, though Houston is coming back."

Hosking, noting that he has long enjoyed "a love affair with this business," said, "National spot is strong after a couple of years of dormancy. Local is very strong in some markets, [while] network is not that strong."

Tough year. Widmann conceded that the network side of the radio business in general is "having a very difficult year, and we anticipate that to continue for a while." For the CBS Radio Network, "the fourth quarter is the strongest with sports," she added. It is unclear yet whether the TV networks' fall season problems, involving a shortage of original programming due to the writers' strike, will help the radio network's ratings, she noted.

Hosking, in electing early retirement at age 56, emphasizes this was "strictly a personal thing," not part of any CBS Inc. cutback, and that he felt "young enough to start another career. Nothing ventured, nothing gained." He intends to "get to know my wife better and get a job in teaching" at the college level, perhaps in communications, management, marketing or advertising.

Asked if he could see any new trends in radio, Hosking says, "If I had a crystal ball, I'd be a consultant!"

Widmann, who joined CBS in 1972 as a CBS Radio Spot Sales account exec, rose through the ranks to its New York sales manager, then to vice president and general manager of WCBS-FM New York, vice president of the owned AM stations and, in 1987, to vice president of the owned AM and FM outlets.

Hosking was head of the CBS Radio division since 1981. During his 30-year CBS career, he rose from a financial management trainee and account exec at WCBS-AM New York to general sales manager at CBS Radio Spot Sales, then switched to the TV side for a few years—as vice president and general manager of WCBS-TV New York and WCAU-TV Philadelphia, and then as vice president of affiliate relations at the CBS-TV Network. In 1980 he returned to radio as executive vice president of the radio division, before becoming its president the following year.

Triple-digit increases for big web spenders

There were a number of double- and triple-digit increases among the top 10 spenders in network radio during April, according to the latest available BAR data. Biggest increase was for Chrysler, with a 229.2% increase. Other triple-digit increases were scored by U.S. Armed Forces, which boosted spending in April by 165.7%, and by K-Mart, up 105.0%.

Double-digit rises were racked up by the following among the top 10: Cotter & Co., up 61.8%; Sears, up 57.5%. The only downer was Anheuser-Busch Cos., which dropped 35.7% during April. Motel 6 is a new advertiser to network radio. Modest increases were registered by General Motors, AT&T and IBM.

Top 10 web radio clients—April

Parent company	April Expenditures	Year-To-date expenditures
Sears Roebuck	\$5,063,610	\$16,399,385
General Motors	2,771,245	10,073,200
Chrysler	2,603,900	5,926,469
Motel 6	1,570,940	1,570,940
Anheuser-Busch Cos.	1,350,700	5,620,400
Cotter & Co	1,327,975	4,852,385
U.S. Armed Forces	1,304,730	4,573,120
AT&T	1,302,870	5,776,500
K-Mart Corp	1,256,600	2,745,305
IBM	1,213,020	1,823,910

Copyright 1988. BAR.

Radio station prices edged up last year

Fewer radio stations were sold last year than in the previous all-time peak year of 1986, but average price paid per station edged up from \$1.55 million in '86 to \$1.59 million last year, according to the fifth annual *Radio Station Trading Bulletin* published by station broker Chapman Associates, Washington, D.C.

The Bulletin analyzes last year's radio station sales, comparing price ranges, sales activity by state and region and sales per month and quarter. This year's edition reports a reversal of quarterly sales trends charted for previous years, "apparently precipitated by the October 1987 stock market crash." Sales remained at a fairly steady rate through first three quarters last year, but instead of the traditional surge of transactions during fourth quarter, number of station sales dropped steeply as 1987 wound down.

With 71 stations sold, down from 97 in both 1986 and 1985, Texas led the stations in numbers of stations changing hands last year, followed by Florida, 49, and California, with 46 radio stations sold. The biggest year-to-year increase was registered for South Carolina. There 32 radio stations were sold last year, up from 22 in 1986.

Radio in cars a magnet for car ads on radio

Almost half America's adults hear radio where they work. And seven out of 10 of those listeners have a say in selecting the station, according to a new survey conducted by Arbitron for the Radio Advertising Bureau. Bob Galen, RAB's senior vice president, research also reports survey findings that almost all cars are radio-equipped, that one third of all U.S. radios are in vehicles and that over 77% of adults said they listened to radio seven or more times during their last 10 trips.

And corporate marketing executives like Philip Guarascio, former Benton & Bowles media chief and now executive director, advertising services on General Motors' marketing and product planning staff, agree that for auto companies, "Radio generates a



"Radio generates a large portion of its listenership while the customer is using our product, driving a car or a truck."

Philip Guarascio

large portion of its listenership while the customer is using our product—driving a car or truck."

Guarascio told conferees at the Annual Radio Workshop sponsored by the Association of National Advertisers and the Radio Advertising Bureau that General Motors, which, between its factory money and dealers spent over \$50 million in radio last year, making GM the nation's third largest radio advertiser, had enjoyed some very good advertising successes associated with

radio. And he reported that from GM's point of view, "The potential is certainly there to make greater use of radio."

But to make the most of that potential, he said radio must overcome some serious obstacles that inhibit radio from becoming a more integral part of GM's marketing plans. Among his suggestions for overcoming:

- "Don't fight TV and cable. Sell radio as an adjunct to TV's increasing ability to segment a market.

- "Continue to offer more targeted syndicated programs. 'Hook' an advertiser by affording the opportunity to be linked with a specific program.

- "Price more aggressively for long-term, large radio users. And help create successful case histories to build more business.

- "Provide more service to the advertiser. Reduce the short-term one-sided sales efforts and increase instead assistance in identifying strategic uses of radio.

- "Improve the ratings systems for more frequent, consistent data, especially for syndicated programs and spot radio."

Guarascio sees radio as "well-suited to the growing tendency by manufacturers to engage in regionalized or localized marketing, and it's favorable for certain

"There are too many stations represented by a limited number of sales firms. And unit pricing is becoming an issue."

demographic target market situations. Radio also offers good opportunities for promotional tie-ins, such as advertising concert sponsorships, giveaways or to simply get people into the dealership. And radio commercial production is still comparatively inexpensive."

Problem areas. But he added that on the local station level, "Sales and service are perceived as problems. There are too many stations represented by a limited number of sales firms. And unit pricing is becoming an issue. A number of stations propose pricing all commercials at the 60-second rate. There is no longer an incentive for using a 30- or 10-second spot. That reduces the advertiser's flexibility.

"The rationale we hear is that fixed unit pricing will lead to fewer commercials and unclutter the medium. But this is perceived by many advertisers as a transparent attempt to raise prices without increasing real value."

He added that the relatively high cost-per-1,000 in local radio "means we can get roughly the same audience count using a 30-second TV spot as 60-seconds in radio. Given that equivalent, advertisers are more tempted to use television—a natural bias because of the visual appeal. You have to remember, some car dealers still love to wear capes and fly across the screen. To counter this bias, spot radio must be priced more aggressively on a CPM basis."

Radio Business Barometer

May spot radio increases 8.6%

After a disturbing little downward blip in April, spot radio resumed its upward, if unspectacular, march in May. There were better months in '88 than May, whether calculated on a straightforward or adjusted basis, but the May figure represented a sturdy, if single-digit, increase.

The latest data from Radio Expenditure Reports, which gathers, combines and analyzes time sales figure from all the major reps, show an 8.6% rise over the May figure of '87. No adjustment was required because of uneven Standard Broadcast Months. May for both years was five weeks long under the last-Sunday-of-the-month rule.

It was a record month for spot radio, topping \$100 million, though there have been other \$100 million-plus months. But none that went as high as \$107,693,500, which was the May figure. During the previous May, spot radio billings were

\$99,179,400.

The last month to top \$100 million was November, 1987, also a five-week SBM. That figure was \$100,028,500. The previous record was June of 1985, another five-week SBM, when billings reached \$104,334,700.

All four market groups showed increases in May, with the top 10 markets doing the best and the 11th-to-25th markets showing the lowest increase.

The top 10 markets were up 12.5%, rising from \$36,133,600 to \$40,647,400. With an increase of 4.2%, the 11th-to-25th markets climbed from \$22,597,800 to \$23,547,100. In between were the 26th-to-50th markets, which went up 10.2%, increasing from \$15,356,900 to \$16,919,400, while the 51-plus markets rose 5.9%, going up from \$25,091,100 to \$26,579,600.

For the first five months of the year, spot radio is now ahead of last year by 4.5%, which is in the general neighborhood of the inflation rate. If this is not impressive, at

least spot radio so far is doing better than it did during all of last year, when billings went down by 1.3%. At the end of May last year, spot radio was down by 1.2% (adjusted by the Standard Broadcast Calendar).

All of the four market groups are ahead of last year, but all of them by modest amounts. The best-performing group is the top 10, which is up by 6.4%. Billings for the five months came to \$136,982,400, compared to \$128,703,600 last year. Thus, the market group accounted for 37.8% of the spot radio total.

The smallest increase for the year to date was turned in by the 11th-to-25th market group, which was up only 1.6%. Billings rose from \$77,404,900 to \$78,631,700, which represents 21.7% of the spot radio total.

As for the 26th-to-50th market group, time sales rose 4.2%, climbing from \$53,606,000 to \$55,866,300, or 15.4% of the spot radio total.

Finally, the 51-plus markets were up 4.3%, rising from \$86,750,000 to \$90,521,800, accounting from 25.0% of the spot radio total.

May

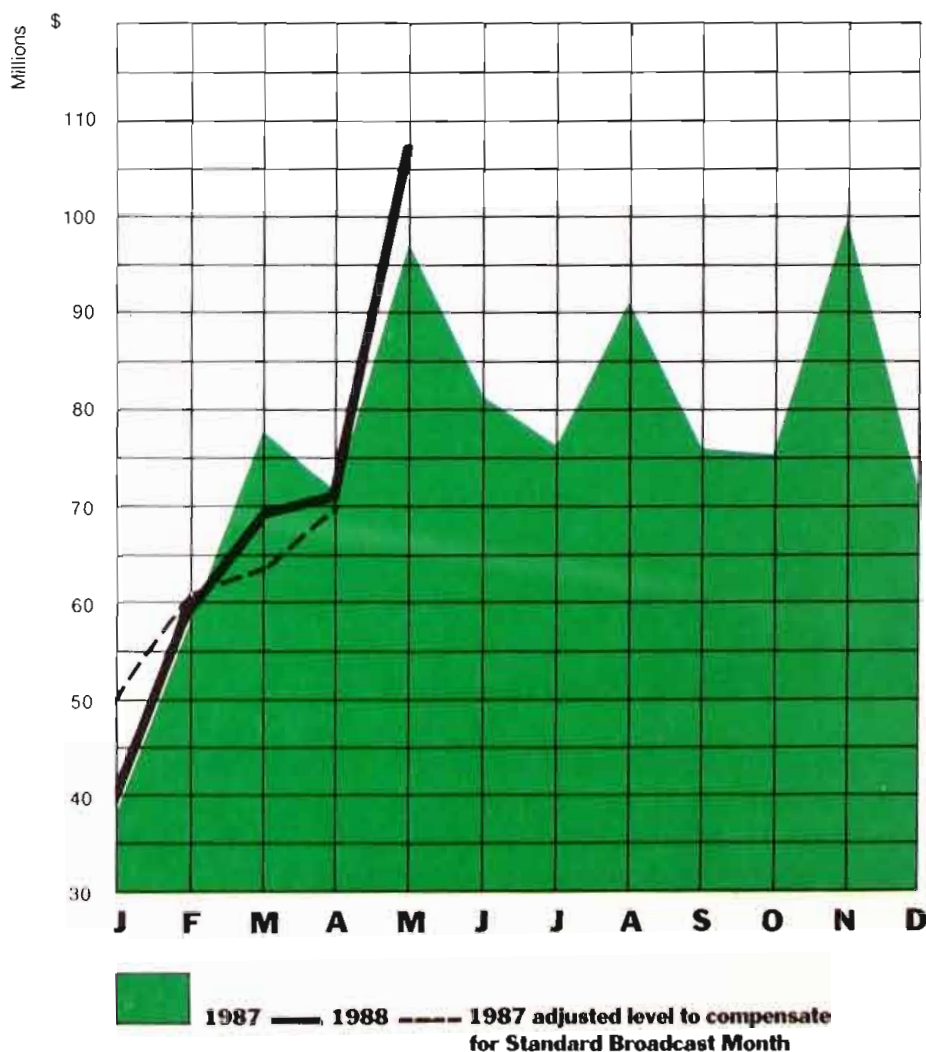
National spot +8.6%

(millions) 1987: \$99.2 1988: \$107.7
1987 adjusted \$99.2

Changes by market group

Market group	Billings (mils.)	% chg. 88-87
1-10	\$40.6	+12.5%
11-25	23.5	+4.2
26-50	16.9	+10.2
51+	26.6	+5.9

Source: Radio Expenditure Reports



RADIO EXPENDITURE REPORTS INC.

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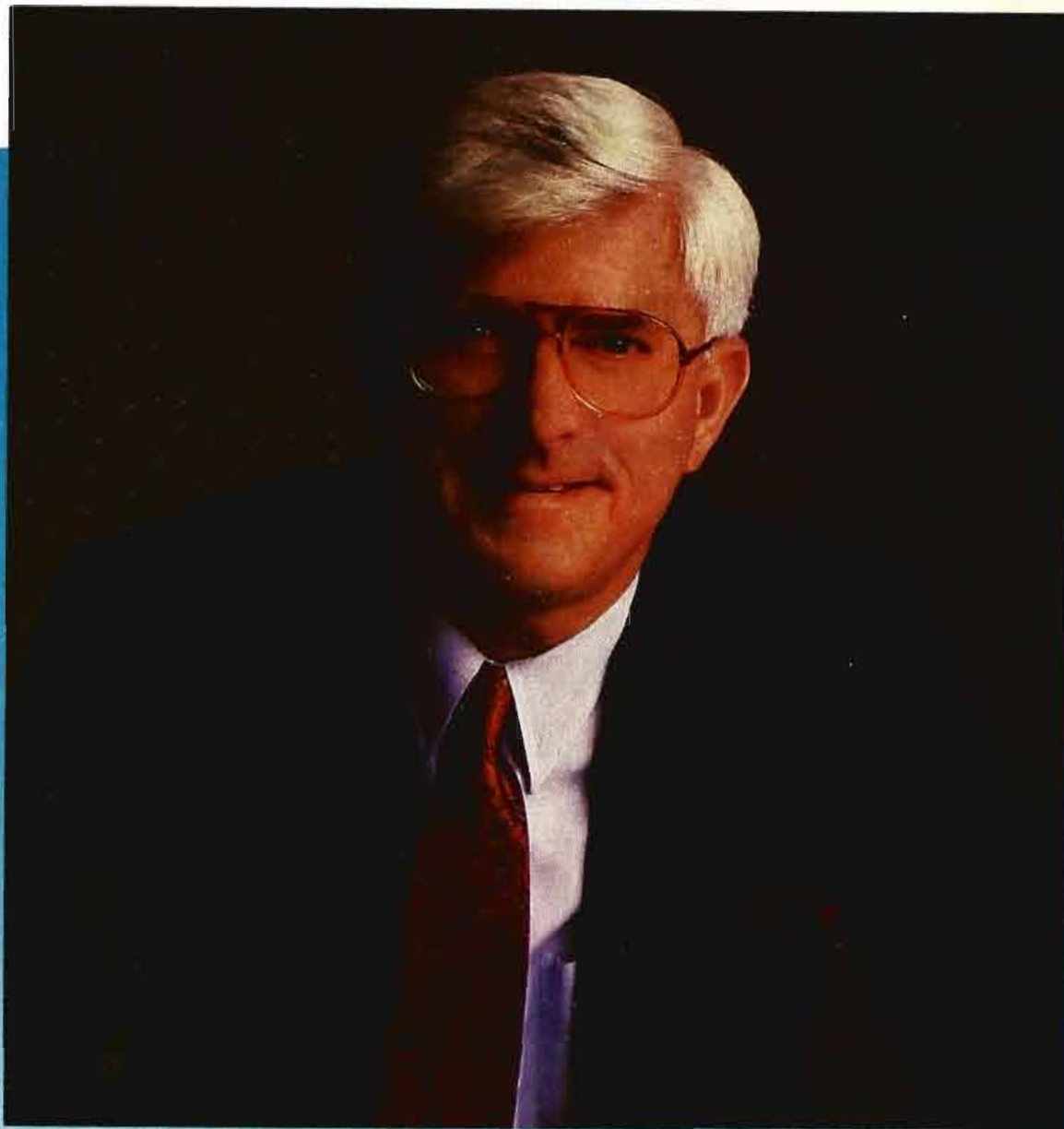
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HITS AND MISSES

Top agencies see Big 3 TV webs finishing in same order next season

Only three series among newcomers picked as sure hits

By JAMES P. FORKAN

As the Big 3 stables approach the starting gate with their best thoroughbreds, the agency buying community has begun placing its bets in the form of upfront network TV purchases for the 1988-89 primetime season.

Only three of 22 fall series entries got unanimous acclaim as hits from the agency media mavens surveyed by TV/RADIO AGE. Ten shows were unanimous choices as misses, while four other misses managed to

collect a sprinkling of maybe votes.

Most major agencies don't expect any surprises in the Big 3's order of finish, with NBC again seen in the winner's circle and ABC picked by most to place. Bozell, Jacobs, Kenyon & Eckhardt's fall analysis notes, "We see little this season to make us like CBS' chances of staying out of third place."

As Mel Conner, Saatchi and Saatchi DFS Compton's senior vice president and director of network operations, says, "CBS has a lot of

How agencies rate the new series

	H	?	M
ABC			
Roseanne	8	0	0
Saturday Mystery Movie	0	0	8
Incredible Sunday	0	0	8
A Fine Romance	0	0	8
Knightwatch	0	0	8
Murphy's Law	0	0	8
CBS			
Murphy Brown	3	5	0
Almost Grown	0	1	7
TV 101	0	1	7
Dirty Dancing	0	0	8
Mary Tyler Moore	0	0	8
Close to Home	0	0	8
Van Dyke Show	0	0	8
Paradise	0	0	8
NBC			
Dear John	8	0	0
Empty Nest	8	0	0
Unsolved Mysteries	0	7	1
Tattinger's	0	7	1
Midnight Caller	0	6	2
Baby Boom	0	4	4
Something Is Out There	0	3	5
Magical World of Disney	0	1	7

Note: Bold-faced numbers indicate whether show falls into "hit," "maybe" or "miss" category. A "hit" (H) is any series with a projected Nielsen share of 26 or better, a "maybe" (?) 22 to 25, and a "miss" (M) 21 or under. Where votes are split evenly, the weight is in favor of the higher category.

HITS

"Dear John" (32 share)



"Empty Nest" (32)



"Roseanne" (28)





"Murphy Brown" (25 share)



"Baby Boom" (22)



"Midnight Caller" (22)



"Unsolved Mysteries" (23)

"Tattinger's" (23)



MAYBES

good shows, but no breakthroughs in the 28 to 30-share level, and that's what it needs . . . It wouldn't take a lot for CBS to recapture second," but he sees nothing on the fall slate that could help it do so. Jon Mandel, vice president and associate media director, Grey Advertising, goes further, foreseeing CBS as a poor third well into fall 1989.

At William Esty Co., Tom Winner, senior vice president and director of broadcast media operations, is in the minority when he anticipates that CBS will retake No. 2 this fall. "Many CBS series have continuing strength, more than ABC," and CBS' new crop is "a little better than ABC's" in his view. Conner at S&S sees ABC second in demographics but CBS edging ABC in fall's household ratings. Most admen agreed that the \$105 million *War and Remembrance* should give ABC the added horsepower to keep CBS well behind in 1989, but Winner is not yet prepared to agree that that will put ABC ahead of CBS.

Looking at the Big 3's individual

horses, this seems like a stronger crop than a year ago. The buyers all agreed three new hits will break from the pack: NBC's *Dear John* and *Empty Nest* and ABC's *Roseanne*. All three—like the sole unanimous pick of last season, NBC's *A Different World*—will get a headstart from their solid lead-ins more than their inherent program strength.

Given the ongoing erosion of the network audience, TV/RADIO AGE again has lowered what it classifies as "hits," "misses" and "maybes." A hit now indicates a Nielsen audience share projection by the key agency buyers of 26 or better (down a point from last year). A maybe falls within the 22 to 25-share range. And a miss averages a 20 share or worse (again down a point).

Many of the agency participants note that they have refined their own definitions in this fragmented era. Says Richard Kostyra, J. Walter Thompson USA's executive vice president and U.S. director of media services, "You have to qualify sometimes because under a 21 share can still be a hit against shows like *60 Minutes* or *Cosby*." He considers shows at 18 or under as misses.

New complication

At BJK&E, Mike Drexler, executive vice president and national media director, points out that a 24 share is "the new benchmark for success." Anything under a 21 is unsuccessful, in BJK&E's estimation. Bill Croasdale, senior vice president at Backer Spielvogel Bates, said series with 25-plus shares should be hits and shows at 21 or under failures. He later bowed out of disclosing his selections for diplomatic reasons, since BSB is CBS-TV's agency. As such, BSB took some flak at CBS' convention in June from affiliates displeased with the network's promotion campaigns.

Complicating the handicapping a year ago was the switchover to A.C. Nielsen Co.'s people meters. This time the confusion owes to uncertainty about the actual start of the fall season, thanks not only to the "Summer" Olympics in September-October but the prolonged

Some series survive kiss of death

Even shares in the miss category no longer doom shows to oblivion.

Last season, 29 programs, including midyear and spring tryouts, had 21 or under Nielsen shares. Of those, ABC's *Full House*, NBC's *Sonny Spoon* and CBS' *Wiseguy*, *Tour of Duty* and *Jake and the Fatman* have been renewed.

Two of ABC's and NBC's biggest hits serve as proof that agencies and networks are not always right, any more than the most expert bettor at the racetrack. Some admen recall that virtually every buyer dismissed ABC's *Growing Pains*' chances of survival in its first season. And NBC's programmers expected no better than second place for *The Cosby Show* against CBS' *Magnum, P.I.*

writers' strike.

In any case, under TV/RADIO AGE's new criteria, frontrunner NBC will have two hits, four maybes and two misses, while runnerup ABC will have one hit and five misses. Also-ran CBS will have one maybe and seven misses. As they approach the far turn, the midseason mark, it will become clear how close the agency picks were.

A night by night evaluation indicates no nights should change hands, though some time periods may be neck-and-neck races. NBC should again win Monday, Thursday and Saturday, most say, though some like BJK&E cite Monday as a "tossup, one of the closest contests" of the fall. ABC should retain Tuesday and Wednesday, and CBS Friday and Sunday; BJK&E anticipates a virtual dead heat for No. 2 between ABC and NBC on Friday.

Other attractions will continue to lure bettors and spectators away from the Big 3 racetrack, in the form of cable, syndication and home video. The Fox Network's fall entries will chip away little. Grey's Mandel, for one, sees *City Court* doing a 6 share Saturdays, *Angels* 88 a 2 Sundays.

According to those divulging their three-network share data, NBC should average a 26 this fall, with its rivals virtually even at 22. That would mean the loss of a point by NBC and CBS, with ABC unchanged from 1987-88. BJK&E calls this erosion to a combined 70 share "minimal."

Here's a look at how the agency bettors size up the steeds in this fall's running of the Nielsen Sweepstakes:

HITS

NBC's **Dear John**, an ensemble comedy about an offbeat support group for suddenly singles, will be in the mid-30s, say Esty's Winner, BJK&E's Drexler and BBDO's Steve Grubbs, senior vice president and director of national TV buying. Average share: 32.

NBC's **Empty Nest**, a sitcom about a newly widowed Miami pediatrician, could outscore its predecessor *Amen*, say BBDO's Grubbs and Grey's Mandel, thanks to *Golden Girls*' lead-in and the promise of crossover episodes. Grey's Mandel is among the few picking *Nest* (34) as hotter than *Dear John* (30), but S&S' Conner calls *Dear John* a much funnier show. Average share: 32.

ABC's heftiest newcomer will be **Roseanne**, described by ABC as "a female Ralph Kramden." Grubbs and Paul Schulman, president, Paul Schulman Co., concur with JWT's Kostyra that the acid-tongued Roseanne Barr's sitcom will be a hit "more for its hammock position than for the show itself." Average share: 28.

MAYBES

CBS' **Murphy Brown**, a sophisticated comedy about a TV newsmagazine's star reporter, is dubbed CBS' sole hit by three buyers—Kostyra, Schulman and Grubbs—but a maybe by the rest of the agency crystal-ball gazers. Drexler notes BJK&E's projected 24 share translates into "a success" at that agency. That'd put it in the *Newhart* and *Designing Women* fall '87

range versus ABC's football and NBC's movies. Average: 25.

NBC has the rest of the maybes. Most buyers regard **Midnight Caller** as only slightly stronger than last season's *Crime Story*, and two deem it a miss. Schulman says this drama about an ex-cop turned late night radio host, "has a chance to surprise," and Winner says it "could possibly win" its slot. Average: 22.

Unsolved Mysteries, which got one miss vote (BBDO), also could surprise given weak CBS competition, Schulman feels. Calling it "moderately successful," BJK&E's Drexler sees it cracking the top 20 among men 18 to 49 and 25 to 54. Average: 23.

Baby Boom, the movie spinoff, split four votes each in the maybe and miss columns. With ABC and CBS seen in a virtual tie 9 to 10 p.m. (ET) by Esty's Winner, *Boom* could be a bust. Schulman projects it as a fall maybe, fading to a miss in 1989. Average: 22.

Tattinger's got one miss vote, but most pegged it as a maybe. Though BJK&E feels heavy promotion in the Summer Olympics will help, Schulman foresees this light drama slipping from a 25 in the fall to a 22 by spring. Winner sees it lagging as ABC's *China Beach* and CBS' *Wiseguy* compete for the lead. Average: 23.

MISSES

Of the 14 misses, five are given qualifiers that could mean survival:

ABC's **Saturday Mystery Movie** may be in the 19 to 20 range but that would be "respectable" on a woeful ABC night, says Schulman. This "wheel" concept should roll over CBS' cellar dwellers, says Winner, and could even "build to give *Hunter* a run for its money," adds BJK&E's analysis. Average: 19.

CBS' **Almost Grown** drama has little room to grow versus football and NBC movies, but it may run second occasionally, notes Winner at Esty. JWT's Kostyra gives it a 21 share, just under its forerunner in the slot, *Cagney & Lacey's* level. Average: 21.

CBS' **TV 101**, sort of a *Broadcast News* in high school, could run

second in Esty's view, though BBDO's Grubbs calls it "a miss with an asterisk." Schulman says it'll fail—but could get a passing grade if moved elsewhere. Paul Isacson, Young & Rubicam's executive vice president of broadcast programming and production, says CBS may be happy with a 20 share here. Average: 21.

NBC's **Something Is Out There** got three maybe votes, but most admen fear it'll be another *V*. Drexler says this "should be left out there," though it has a shot at No. 2 behind *Dallas*, while Winner sees ABC's sitcoms beating this sci-fi entry. Average: 21.

Magical World of Disney on NBC, another "wheel," is a miss in household ratings but could retain its clout among teens, kids and women 18 to 34, to edge ABC's *Incredible Sunday*, most buyers feel.

Average: 18.

As for the outright duds, ABC has four and CBS five, all languishing in the 13 to 17 range.

CBS' **Van Dyke Show** and untitled **Mary Tyler Moore** series will "go the way of *Lucy* on ABC," Drexler forecasts. Grey's Mandel gives its lowest fall share projection of all (a 12) to *Van Dyke*, which Schulman calls "a terrible miss." Average for *Van Dyke* is 15, for *MTM* 16.

CBS' pseudo-western **Paradise** is dismissed by Kostyra as "a disaster that doesn't stand a chance and shouldn't even be on the schedule." It's headed for Boot Hill, given its lowly average: 13.

CBS's Saturday lead-off combo, **Dirty Dancing** and **Close to Home**, will do better than CBS's Wednesday openers, thanks to an even weaker ABC series. Averages: 17

for *Dancing*, 15 for *Close*.

ABC's **Incredible Sunday** ratings will be far from incredible, but Kostyra of JWT thinks it'll do "as well as Disney did" last fall, a 17. BBDO's Grubbs, however, sees Disney benefiting from ABC's woes 7 to 8 p.m. Average: 16.

A Fine Romance on ABC, about a mismatched pair of TV travel show cohosts, won't travel far, given the buyer's average share: 15.

ABC's **Murphy's Law** is a drama Schulman labels "a big miss" and BJK&E calls "a lightweight." Average: 14.

Knightwatch on ABC, about inner-city crimefighters, faces a losing battle in its killer Thursday time slot. Drexler predicts it will beat CBS's *48 Hours*, but Esty's Winner expects just the opposite. Y&R's Isacson sees it as for teens only. Average: 14. □

MISSES



"Dirty Dancing" (17 share)

"Close to Home" (15)



"Saturday Mystery Movie" (19)



"The Van Dyke Show" (15)

"Paradise" (13)



"Almost Grown" (21)



"Something Is Out There" (21)

"A Fine Romance" (15)



"Murphy's Law" (14)



"TV 101" (21)

"Mary Tyler Moore" (16)



Writers' strike, 54% penetration figure into selling strategy shifts

Cable networks direct ad pitches at Big 3's jugular

By EDMOND M. ROSENTHAL

While the broadcast networks swim upstream against audience erosion that can only be heightened next fall by the rerun-necessitating writers' strike, cable networks are making big splashes in the mainstream. As evidenced by the cable webs' new and upcoming pitches for ad dollars, cable's current 54% penetration of U.S. homes is making for a shift in sales strategies.

No one is more aware of the difference than Doug Greenlaw, senior vice president, advertising sales at MTV Networks, who moved over from a similar post at CBN Cable Network a few months ago: "When I started six or seven years ago, everyone was waiting for the magic number to open the floodgates. First they said it was 30-35% penetration; then it went to 40-45%. But when we got to 50%, they started taking cable seriously. "Now the media people are pay-

ing attention, and cable is part of the media plan. Of course, we still represent only \$1 billion of a \$25 billion television advertising industry, but their expectations in terms of audience delivery are exactly the same as they are for the broadcast networks."

Along with these parallel expectations, cable ad executives say, come greater demands for guarantees against demographics and substantiation of audience delivery (see accompanying story). At the same time, the cable webs—without flinching—are asking for a greater share of the network pie and demonstrating more forcefully why they should get it. And the general rule that cable's cost-per-1,000 (CPM) should be half that of broadcast's is going out the window as cable's case gets stronger.

Except for the most specialized networks, the cable webs are broadening their pitch to move away from the perception of cable as a narrowcasting medium. But

Lou LaTorre, senior vice president, advertising sales at pioneer superstation WTBS, says WTBS has the ammunition to sell either as a horizontal or vertical network. He points out it can say, "If you want kids' shows, we've got them. Our *Night Tracks* music video programming and sitcoms deliver more teen viewers than MTV. We've got women-oriented and men-oriented movies—and in sports, we've got the NBA, baseball and motor racing throughout the year."

Meanwhile, WTBS' recently completed presentation for upfront business emphasizes its appeal as a broadbased network, showing growth over the past five years and "our ability to reach certain ratings levels." LaTorre says WTBS is distinguishing itself as "the only cable network that has a 1-2 total U.S. rating in virtually every daypart."

Pitching pretty much in the same direction is USA Network, which is now in 51% of all U.S. households. John Silvestri, senior vice president, advertising sales, says USA is posturing itself as a national version of an independent station, selling horizontally and touting its ability to counterprogram the broadcast networks with similar programming—such as children's, movies and action-adventure hours—at times when the networks are not running such fare.

USA is pinning a good share of its hope for fall on off-network series such as *Miami Vice* and *Murder, She Wrote* plus all-new product such as 26 hours a year of *The Robert Klein Show*, running Sundays at 10-11 p.m. "Where we're different from independents," Silvestri says, "is that we reach approximately 45 million households and program nationally. We're selling to national buyers who understand what we're doing because they buy syndicated programs similar to ours. We feel we're fast approaching the same reach syndication has."

Greenlaw of MTV Networks sees much of the cable approach going into a third stage of evolution: first, the narrowcasting approach; second, a broad-reach phase aimed at replacing the broadcast networks' audience erosion; and now a real-

Nashville pizza party



MTV on the mall



A&E's "Vanity Fair"



ization that the vertical networks are the ones that are reaching the light TV viewers.

To Greenlaw, the vertical approach is selling four entities that are age-segmented: MTV for the 12-34 demographic, VH-1 for 25-54, Nickelodeon for age two to early teens and that network's later-in-the-day programming, Nick at Nite, for an audience that generally gets progressively older as the hour gets later.

Value-added television

For MTV in particular, the ace in the hole is what Greenlaw calls the "value-added" environment, in which MTV creates special events that supplement what advertisers do on-air. One such event is "MTV's Museum of UnNatural History, a shopping mall exhibit that's scheduled to appear in 28 locations around the country this year with 11 advertisers in tow. Polaroid, for example, supplements its advertising for its newest instant camera, Cool Cam, with an exhibit where youngsters can be photographed posing as "performing" rock stars and can also borrow a Cool Cam free-of-charge for the day to take pictures of friends, family and other MTV museum exhibits.

Such events cost the advertiser more money, but Greenlaw points out the money is coming out of promotional dollars. He explains, "When we talk to an advertiser, we try to integrate into the longterm marketing plan—not just get an advertising schedule. When we talk to them, we bring our marketing people along and do two- or three-

year deals in terms of integrated programs to reach the youth of America."

For The Weather Channel, value-added has become the dominant pitch. The specialized network has developed a multitude of short features that advertisers are part and parcel of—for example, a motor oil sponsoring "Weather and Your Car." The typical approach, according to Ed Peters, vice president, director of advertising sales, is an opening billboard, a 60-second feature and then the commercial.

And with clutter on the broadcast networks becoming a louder battle cry at the agencies, TWC is strengthening its pitch, "Every spot is adjacent to programming—no clusters."

A big part of the value-added approach is regionalizing commercials, using the Weather Star equipment that allows TWC to deliver separate local weather messages as stills to 3,500 cable system headends. In a cooperative adver-

tising effort that starts with the manufacturer, local dealers are tagged at the individual systems. Peters says this helps the manufacturer with its marketing, allowing it to say, "If you'll buy X amount of our product, we'll tag you."

It's this program that has helped appreciably in smoothing out TWC's revenues throughout the year from a previous situation where, as recently as 1986, 55-60% of revenues were in the first and fourth quarters, when inclement weather makes for greater viewing. Also helping to even out revenues has been a greater amount of lifestyle programming, Peters notes.

Whole-hog on the value-added approach is The Nashville Network. According to Peter Weisbard, vice president, sales for Group W Satellite Communications, which handles its ad sales, "We're selling programs vs. a network, and a great many of our programs are targeted demographically and psychographically"—such as fishing, auto racing, country music and rock music.

As TNN produces all of its own programming, it incorporates messages and products into the programming—"something you can't do with broadbased programming that comes out of the can." For example, TNN had its debut last April of the first program it has produced for the daytime audience—*American Magazine*. Crisco sponsors the cooking segment, and its product is quite visible in the show.

Most recently, TNN held a pizza party on its *Nashville Now* stripped 90-minute show. It was



USA's Robert Klein



Lifetime's "Cagney & Lacey"



CBN's "Second Honeymoon"

The Weather Channel



NBA on WTBS



NFL on ESPN



A little respect, a lot of headache

Recognition has its price, the cable networks are learning. They're now being pushed into something the broadcast networks had long resisted—demographic guarantees.

Dick Hammer, director of advertising sales for CBN Cable Network, reports, "Agencies originally settled for household guarantees, but in the past year-and-a-half or so, they've been insisting on demographics more." He notes the current difficulty is that, while overnight household ratings are available, demographic data so far is supplied only quarterly.

How does CBN handle this? If it guarantees a rating against women 18-49, it watches the overnights and, if household ratings go down, it just assumes that demographic will follow and puts additional announcements into that quarter rather than waiting for the quarterly demographic data. Hammer says, "This gives us better inventory control so we're not writing off audience deficiency units in the next quarter."

And lots of paperwork comes with agencies' enhanced expectations. Where the agencies previously handled the process of reconciliation against guarantees, "They've now managed to push the whole process onto us," Hammer laments.

Adds Whitney Goit, senior vice president, sales and marketing at Arts & Entertainment, "The broadcast networks fought the idea of providing demographic guarantees in the past, but there's no question they're part of the future. The number of agencies asking for post-buy analysis and demographic guarantees is more widespread than it had been.

"When you look at sample sizes for the industry, you're reluctant to base a whole lot on too small a time period. So, when we sit down with an advertiser, we look at a longer time frame in order to be confident that we deliver." When all else fails, A&E covers itself in advance with extra spots as CBN does.

the setting for Pizza Hut to feed the guests as an introduction for its new Hand Tossed pizza. Weisbard says this type of treatment generally commands a 20% premium in rates over straight buys of spots.

Shifting the target

Some of the networks, meanwhile, are enhancing their revenue potential by refining their targeting. One is Arts & Entertainment, which recently commissioned The Lamont Group, marketing and media specialist concentrating on affluent consumers, to go after print advertisers that don't usually use TV. Whitney Goit, A&E's senior vice president, sales and marketing, notes these advertisers usually engage boutique agencies that A&E doesn't call on.

Goit says A&E has missed out on some of these smaller advertisers to the upscale market because they have found production cost prohibitive, so Lamont is working out ways for them to do commercials at

modest cost. This may mean A&E supplying performing arts footage and music from its programming and running a still of the product.

Financial News Network is now attempting to broaden its advertising base in another way. Art Miller, senior vice president, national sales, points out that financial services have represented the bulk of the network's business but that it is now going after more broadbased advertising—for example, credit cards, which index higher in usage, via Simmons research, on FNN than elsewhere.

He says FNN is attempting to develop more longform programming that is "consumer friendly" as an environment for such categories as travel and business-to-business. For example, in September FNN will launch a weekly half-hour on the art market: "We're trying to get away from the pure financial investor aspect. Since the October crash, people have been looking for more things to do with their money."

The cable networks are also hoping advertisers are looking for more things to do with their money because of the impact of the writers' strike on the broadcast networks. Reference to this situation is gradually creeping into cable sales pitches. For example, Silvestri says USA Network is emphasizing its "fresh product" against network reruns. He says USA has made an investment of more than \$250 million, which includes promotion, to develop original programming for the next year-and-a-half.

Taking cable seriously

At WTBS, LaTorre says salespeople are pointing to the 9% audience falloff for the three networks between last season and the previous one and what, they say, will be an accelerated loss from delaying the fall season. Against this, they point to the growth in cable penetration and the improved programming on WTBS. Greenlaw at MTV says, "We're just sort of planting the seed because the strike could end tomorrow. We're not going to make too big a thing of it until we get into the summer." But the unofficial slogan is, "No one has more original programs than the MTV Networks."

One indicator that agencies are taking cable more seriously has been the growth in CPMs. A&E's Goit notes there had been a decline in cable CPMs for some time but that it has reversed itself since the beginning of last fourth quarter.

Jack Bonanni, ESPN's vice president, advertising sales, says, "We've always gone after ABC, NBC and CBS sports, and we're no longer half the CPM of network programming, because the marketplace is paying more for cable now."

He points out CPM comparisons depend on the mix of programming that's bought: "We rarely sell anything alone. We package the network, so if an advertiser doesn't buy live programming alone, it brings down the CPM." Individually, ESPN's college basketball could only be 10-20% lower than that on broadcast TV, he notes, and ESPN's NFL football has about the same CPM as ABC's. Against CBS and NBC afternoon



CNN "Money Line"



FNN's new set

football, ESPN's carriage of the sport is even higher, because it's priced as primetime.

Adds John Barbera, senior vice president, advertising sales at Cable News Network, "For the upper end networks, we don't have to settle for 50% of the broadcast CPM any more." He says CNN's *Money Line* business show gets 10-15% more than typical broadcast network programming and "overall, we're about 20% below the networks in CPM."

"But if we target upscale, we're consistently comparing CPM in that demographic against network—and we can be 1/10 of the CPM for upscale demographics." He adds that the current CNN pitch approaches the changing demography of the nation, emphasizing 35-64, "which controls the majority of the income in the country."

Many of the cable webs have premium product that commands higher CPMs because of environment. At Lifetime, the movement has been toward more documentary specials on women's subjects as well as women's tennis, both not only commanding higher CPMs but also bringing in new advertisers, according to Doug McCormick, vice president, sales.

But, like the broadcast networks, Lifetime counts on series as the glue. Its centerpiece these days is *Cagney & Lacey* reruns, which Mc-

Cormick says have "done so much to boost the ratings of the network." Stripped at both 8 p.m. and 11 p.m., he notes, its 12 runs per week command a total of 5.5 million households. But Lifetime hasn't forgotten the likes of parenting shows, which advertisers buy "because there are no other shows like it."

Part of Lifetime's current pitch takes it somewhat beyond selling only against women and toward adults 18-54. It's showing how broader programming like prime-time movies is picking up men, implying that women are controlling the set. McCormick reports Lifetime is also positioning against other cable networks, stating 65% of the women who watch Lifetime never watch USA or WTBS. Another big weapon is MRI data showing the Lifetime viewer's greater disposition to purchase certain products.

CBN Cable Network continues to tout its ability to reach the entire family as well as an upscale viewer with off-network product like *The Paper Chase* and *Crazy Like a Fox* and originals like *The Campbells* and *Second Honeymoon*. And Dick Hammer, director of advertising sales, asserts, "As an industry, we're considered more mainstream now in terms of planning at the agencies."

Hammer implies a pitch against syndicators: "Syndication is not so hot now, because the list of hits is so limited. Many syndicated programs, such as game shows and wrestling, skew 50-plus."

Gutsy sales pitch

Even though cable has been accepted as mainstream among many agencies and advertisers, CBN is maintaining that the education job isn't entirely over. Rick Busciglio, director of sales development, has just put together a new presentation aimed at those who "still have a perception of CBN that was true four or five years ago." The slide presentation asks and answers questions. And the answers include: CBN has 84% of the top 50 advertisers, it sells to all of the top 20 agencies, and 30% of its programming is original and exclusive to cable.

Meanwhile, WTBS is getting gutsier in its presentations. LaTorre reports, "A lot of advertisers say they can't devote 10-15% of their network budget to cable because we're not national. We've put together data on reach levels showing them they can cut back 30-35% of their network weight and put in cable—and their total U.S. reach is maintained."

WTBS, as part of its presentation, is using analyses from Cable-television Advertising Bureau but, according to what other networks indicate, pushing them a lot harder. This is because, where four networks are rotated in the various analyses, WTBS "is the only one consistently in the mix with the lion's share of the money."

LaTorre says the presentation is used to show how cable's proportionate reach goes well beyond the 54% penetration in areas where it counts, like certain demographics: "We show where we can be anywhere from 54% up into the mid-60s. In spending power and consumption, we're much higher than that. It can translate into 70-75% of the consumption."

A&E, according to Goit, has been concentrating more on package goods advertisers, showing them they don't have to leave television and go to magazines to offset network TV's underdelivery. Meanwhile, it's going for premium prices on coproductions that it's getting into, like the *Vanity Fair* miniseries it's doing with BBC. Goit says it's asking for and getting \$5-6 CPMs as against a typical \$3 for run-of-schedule.

One final hurdle that cable is beginning to encounter, according to MTV's Greenlaw, is "making cable easier to buy." He says the people meter should help standardize the cable networks from a ratings analysis point of view, and now Cable-television Advertising Bureau is endeavoring to standardize the paperwork among cable webs.

He states why the latter is important: "Our four networks alone have 6,410 avails to sell per week—more than the entire syndication industry combined, and we limit our commercials more than the others. For the entire cable industry, they're dealing with 155,000 commercials a week." □

Agencies: Cable tries harder

The tortoise is overtaking the over-the-air hare

By GEORGE SWISSHELM

The cable networks have reached parity with the Big Three in at least one area: quality of sales force. In the eyes of some major agency network buying chiefs, cable's tortoise has even managed to nose out the over-the-air hare. Those on the cable side may be a shade better, they say, often working harder and smarter, because they have to. Like Avis, No. 2 tries harder.

"The quality of the cable networks' sales people has improved tremendously, particularly those representing the larger, well-established cable networks," says Mike Drexler, executive vice president, media at Bozell, Jacobs, Kenyon & Eckhardt.

Bart McHugh, senior vice president, director, national radio/TV programming for DDB Needham New York observes, "Not only are most of today's cable sales people originally from the broadcast networks; I'd say most of the cable people are at least equal to, if not a little bit better, if only because they have no choice but to work harder."

And at McCann-Erickson, Bill Sherman, vice president, supervisor of national broadcast, agrees that the cable contingent, "being the newest guys on the block, are



Bill Sherman of McCann-Erickson says cable web salespeople are more visible than broadcast's.

still No. 2, so they're forced to try harder."

Gary Carr, senior vice president, manager, national broadcast for Lintas New York, points out, "It's an apples to oranges comparison because cable is an entirely different sell. Cable has to do a lot more developmental work and say, 'Buy me!'"

At William Esty Co. Tom Winner, senior vice president, director, broadcast media operations, agrees that the matchup "doesn't lend itself to direct comparison because each sales force plays a different role. The cable folk are performing as missionaries who must sell their medium as well as their own particular service or channel. There's a great deal of enthusiasm on their part.

Faster reflexes

"At the over-the-air networks they're working with such huge numbers of viewers and dollars that there are more layers of management to go through before anything a little unique or different can be approved."

Winner agrees that cable's sales people usually can't get an immediate O.K., either, for something off the beaten path," but most usually have to call only one manager to get an answer, so we get our answers back faster."

At N W Ayer, Bob Igiel, senior vice president, group media director, programming and network negotiations, sees "the whole selling environment so competitive that both the broadcast and cable network people are forced to be very hard-working professionals. There was a time, when cable started, and their people were still learning the business. But those days are behind us. Today more talented people have entered cable's ranks, some of them moving in from the broadcast networks themselves. Because of the intensity of the

competition, no one on either side can afford to sit on their hands and take it easy. Everyone on both sides is giving it everything they've got."

Lintas' Carr notes, "Up until fairly recently the TV network people hadn't had much competition. Advertisers *wanted* to be on the networks. The way they 'sold' was really to *service*, to keep existing customers happy. Both the broadcast and cable people are very good at what they've had to do, but they've been doing different things. Cable, because it's had to come from behind, has had to be more aggressive and more negotiable. Cable has far more avails and is still not even close to sold out, so they're eager to help us find more creative ways to package and price all their inventory."

Bozell's Drexler recalls, "There was a day when cable drew its sales talent from anywhere, whether they were familiar with the special requirements of broadcast advertising or not. But that was then. Today more of the cable networks are able to attract sales staff from the three broadcasting networks and from advertising agencies. In doing so, cable has recruited some high quality and very savvy marketing and sales professionals."

One reason cable networks have been able to do this, continues



Mike Drexler, BJK&E: Cable networks are recruiting savvier people than they did initially.



Gary Carr of Lintas points to cable webs' creative packaging.

Drexler, is that "Today they're in a position to offer higher salaries. And more money is the icing on top of more opportunities to sell creatively and to design some unique advertising and programming buys.

"In addition, cable can offer its people a chance to work in a less structured, less political environment with less hierarchy, fewer internal fiefdoms, and less company dictation of hard and fast, inflexible rules. All of this has helped improve the quality of cable network personnel."

At the same time, Ayer's Igiel observes, "While it's true cable's been more flexible in a variety of ways, with fewer built-in traditional rules, the TV networks have come around to recognizing this and have become more open to change themselves. The gap here is narrowing."

Regarding flexibility in guarantees and makegoods, Igiel again finds more similarities than differences between the two. The chief difference he sees is that "There are generally fewer preemptions in cable." And he reminds us, "Audience fragmentation is not something that subtracts only from the broadcast networks. Fragmentation cuts in all directions and takes viewers from cable and from the independents at the same time it's taking them from the Big Three. Everyone is affected, and both sales forces have to work hard to overcome it."

McCann's Sherman sees a difference in visibility: "The cable people call more frequently. They make themselves more visible at the agencies, and particularly at the clients, than representatives of

the traditional networks. They feel they need to be seen by clients to reinforce acceptance of cable, unlike the traditional network people who are willing to depend on the agencies to make their case."

To Sherman, the main difference in the flexibility department is, "There's considerably more paper work in cable, and that makes it a little slower getting to the post buy. Both the major cable networks and the traditional Big Three are computerized, so there's no holdup there except in the case of Turner. Its computers are in Atlanta, and things take a little longer getting back and forth."

Esty's Winner reports, "Both understand our clients' objectives. The TV networks know we're buying them for broad national reach. Cable's people understand we're buying them for a more narrowly targeted audience, and they're more open to new ideas and opportunities. Adding extra merchandising and promotional incentive on top of the straight advertising is a normal part of the cable networks' sales repertoire. At the broadcast networks this is just starting to be accepted."

Looking at research, McCann's Sherman concedes there have been problems with cable's small samples but adds, "That's been a function of the medium, not an indictment of the people selling it. And shortly, in September, the research problem will be taking a turn for the better when Nielsen starts up its people meters."

Bozell's Drexler observes, "Though it's not there yet, the quality of cable research has also improved. But if it's not there yet,



Tom Winner of Esty: Cable's more open to new ideas.



Bob Igiel of Ayer doesn't miss the self-generated research.

it's not for lack of trying. It's the difficulty of measuring smaller audiences that are greatly fragmented and the problems of smaller sample sizes and more unstable samples that the television networks aren't forced to deal with. But in spite of these problems, I have no doubt that the quality of cable research will continue to improve and eventually become as sophisticated as that offered by the television networks."

At Ayer, Igiel notes, "Some of the cable networks have only recently gone on line with some of the newer Nielsen research tools. But the days are gone when cable people came in with those self-generated reports that weren't quite up to snuff. By September, when people meter measurement will be available equally to all, their impact should be the same on cable viewing levels as on over-the-air viewing."

Most of the agency media chiefs declined to publicly rank sales staff quality by cable network "because most of them are very good at what they do." But those whose names crop up repeatedly as standouts include ESPN, The Discovery Channel, CNN, USA, Arts & Entertainment, and the Nashville Network.

Meanwhile, some agency executives predict that change looms for the Big Three. Says Lintas' Carr: "The people at the television networks who have only had to do a good servicing job for so long are going to have to start becoming more aggressive, too. The networks have so much new competition, they're no longer the place where everybody places 100% of their budgets." □

Kreek revs up Fox TV stations

New O&O chief places emphasis on original programming

By ELIOT TIEGEL

In 10 years Bob has gone from figuring out ways to increase the production of bananas for United Brands as an operations analyst to increasing the profitability of the six Fox television stations as the new president and chief operating officer of the station group.

In between bananas and *A Current Affair*, one of the group's hot properties, Kreek learned about negotiating film library deals for HBO, so he brings to his new position an understanding of cable as commercial broadcasters battle to expand their grip on what appears to be an ever-changing viewing audience.

Having replaced Derk Zimmerman June 20, several weeks after Zimmerman left to become president of Group W Productions, Kreek, 39, has a full hotplate of objectives and goals for the owned and operated stations in New York WNYW(TV); Los Angeles KTTV(TV); Chicago WFLD(TV); Dallas KDAK(TV); Washington WTTG(TV) and Houston KRIV(TV). A seventh station in Boston, WFXT(TV), is going into a trust situation as a result of the FCC's crossownership rules which prohibit Fox's owner, Rupert Murdoch, from controlling both the station and *The Boston Herald*. Fox will retain an economic interest but not an operating function, Kreek explains.

Of prime concern to Kreek are improving sales, creating original programming, enhancing the image of the group stations, improving cost controls in overhead and licensing agreements and exploiting the synergies between Fox Broadcasting and the station group.

Where they've never gone

"We've got to take the stations to a place they've never been before," he says.

With revenue in the industry "quite tight," and with a variety of viewer options trimming audiences for over-the-air broadcasters, "the only way you can win is to get programming that advertisers and the audience demand to see at a price that is somewhat reasonable. Prices for licensed shows have gone through the roof, so the answer is original programming."

Several of the group stations are already producing shows which air on the O&Os and the Fox network.

WNYW produces *A Current Affair* and *DJ Cat*, WTTG produces *America's Most Wanted*, and WFLD produces *Over 17 Not Admitted*. *Dr. Science*, a weekend half-hour from KTTV, was dropped after 13 weeks. KTTV gets another shot with *King of the Mountain*, half-hour game show debuting this month, Saturdays at 8:30 p.m.

Upcoming from station group members: *The Reporters* from

WNYW and *Wonderama* from WFLD, which will strip daily from 7-8 a.m.

The Reporters debuts July 30 on the full Fox Network, while *Wonderama* debuts sometime in the fourth quarter on the seven Fox stations.

The station group has some ambitious plans for additional first-run original programming.

Stephen Chao, vice president for program development, is working up a projected series of monthly one-hour news-related specials. Involved in this project are Jake Tauber, vice president for development, and producers Todd Meisrow and Mike Meadows.

Kreek says these news-oriented shows will offer points of view and perspectives that will be different from normal news specials. They'll start this fall.

Tauber, who is the liaison with Nickelodeon, which provides Fox with *Double Dare* and *Finders Keepers*, a new game show which debuts this fall, has a number of game shows in development, Kreek points out.

Fox Broadcasting could pick up any of these specials, but having them run on the network is not a priority for Kreek, he says. Coming up with a good idea is paramount. "Then we'll see where it plays and how it get distributed."

Kreek says these monthly in-house specials will be augmented with third-party distributed programs. He also is looking to get involved in coproduction deals for miniseries and original specials to solidify the Fox Stations image for unique, different programming.

Each of the O&Os can refuse to take any of the offered shows. "But as a practical matter," notes Kreek, "when a station sees success on any of the other Fox stations, they tend to change their minds and test a show they didn't have confidence in before."

"The big home-run area for us is 8-10 p.m. Monday through Friday, starting this fall," Kreek stresses. He wants to wean Fox stations off

"Over 17 Not Admitted"



Several of the group stations are already producing programs which air on the O&Os and Fox Network.

movie packages during those hours.

A second adventurous project for the station group will be its political convention coverage.

WYNW producer Kim Montour will handle Fox's convention coverage for the network and the station group. Working with a staff of 18, borrowed from group stations, the election unit will produce two 2½-minute updates airing at 8 and 9 p.m. for each of the four nights of both conventions in Atlanta and New Orleans. There'll also be softer pieces prepared for use by individual station news departments. Five Fox stations have regular newscasts; Boston and Dallas do not.

There'll also be three- to five-minute convention news reports for network and O&O use.

Notes Kreek, "This is pretty ambitious. But we're doing it the right way by utilizing our own people and equipment. We'll use KTTV's satellite newsgathering truck and the cost for covering the two conventions is a few hundred thousand dollars." Kreek says no decision has been made yet about what the network will do on election night itself.

Improved market share

Kreek sees the current station group growing financially as the much sought-after original programming is secured and clicks. (He's looking to purchase stations in major markets, only they're not available at a reasonable price.) He acknowledges Fox Broadcasting's Saturday night programming has problems, while Sunday's line-up has fared much better.

Since Fox purchased the former Metromedia stations in March 1986, their sales and market share performances have been rising, Kreek claims. New York, Los Angeles and Washington are the strongest outposts. According to Kreek: In New York sales are up 13.5% and the market share is close to 16%; in Washington sales are up 20%, the market share exceeding 25%; in L.A. sales are up 16%, market share stands at more than 13%; and in Chicago, sales are up 20%, market share 13.5%.

Boasts Kreek, "We're moving in the right direction, but to a station, they haven't reached their poten-



Kreek believes the individual stations will gain from recent revision of the syndex rule.



Bob Kreek

tial." Chicago and Houston follow New York, L.A. and Washington in terms of strong performance rankings, with Dallas and Boston on the third level.

"Chicago is just rebounding from 18 months of having a tough time," notes Kreek. KDAK Dallas started out two years ago as a Spanish language station, and Kreek calls it a "startup" as an English language operation which has "doubled its ratings over last year in a very competitive market." It and WFXT Boston are the two UHF's in the chain.

Kreek, who reports to Fox Inc.'s chairman Barry Diller, speaks to him daily and sees him twice a week on the Twentieth Century Fox studio lot across town. Diller offers Kreek input in programming and promotion: "He's a sounding board for ideas; he has extraordinary program instincts.

"He doesn't so much as knock down ideas but rather redirects or restructures ideas. He also sees the wisdom of Fox Broadcasting and the TV stations cross-promoting each other." One of Diller's own ideas resulted in *Over 17 Not Invited*.

Some 1,250 people work at the Fox stations, a reduction of about 100 during the past several months.

In fact, there is only one station vice president/general manager still on the payroll from the old Metromedia days, Jerry Marcus at KRIV Houston.

There have also been major changes at the general sales manager's level at Fox Stations, all designed to generate excitement, enthusiasm and a new image for the chain.

While each of the Fox stations has some subtle different charac-

teristic, L.A., New York and Washington "have well-established local identities driven by news and news-related programming." KTTV also carries the Dodgers and some NFL/ESPN games; WFLD has White Sox baseball, Chicago Bulls basketball and Georgetown basketball, while WTTG offers some preseason Redskins football contests.

Kreek says he'd like to increase sports, and the stations will bid for local franchises when they become available.

He believes the individual stations will gain from the recent revision of the syndication exclusivity rule. "It was the right thing to do. Stations will benefit from the exclusivity they can now demand in their markets. It's been a long time coming."

Broadening the profile

Kreek is of the opinion that the network's weekend programming has given the company-owned as well as affiliate stations a new profile in their markets, and this is the foundation on which he plans to build other evenings for the O&Os.

While he hopes to feed the network with station-produced shows, he recognizes the network may not accept all his offerings. *Over 17* is probably going to be a little younger than Fox Broadcasting may like, he points out, and thus it may not be interested.

"They are in our program development meetings and know what's going on. But I'm producing for the stations foremost. I develop programs based on our stations' needs in their markets. Good solid programming cracks a myriad of problems." □

Television/Radio Age

July, 1988

Lower crop yields, export problems, volatile commodity prices may intensify

'Demon drought' widens its impact on farm economy

By FRED ALLEN

A "demon drought"—dubbed the worst since the "Dust Bowl" days of the '30s—is widening its impact on the U.S. farm economy in almost every key agricultural section of the country this year.

At its start, 1988 seemed to be the year when a fragile recovery in American farm and agribusiness fortunes would continue to pick up steam. Instead, the only "steam"

on the farm front this year has been fueled by two years of low moisture, fanning into full-scale drought which has blanketed much of agricultural North America during the first half of '88.

Weather experts point to a split in the jet stream, powering weather changes across the continent, as the probable cause. They explain that a number of unusually stationary areas of high pressure have helped block the normal transcontinental flow of weather, detouring

Soybeans: before and after the drought



Government officials and farm belt politicians are considering options for a wide range of drought assistance programs.

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Orion Samuelson and Max Armstrong, rated #1 and #3, respectively, in the Doane Farm Broadcaster Popularity Survey, serve American agriculture with live-satellite programs 20 times a day on more than sixty radio stations in seven states. Their programs, National Farm Report and Farming America, are also available through tape distribution. Orion and Max host a separate line-up of outstanding midwest agri-business programs on WGN Radio, Chicago, including the Noon Show and hourly reports on activity at the Chicago Board of Trade and Chicago Mercantile Exchange.



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When you review the accomplishments of John Block, it becomes clear why he is considered to com-

Another Exclusive

Mike Perrine heads new 16-station AgriVoice-Indiana

Veteran farm broadcaster Mike Perrine, based in Indianapolis, covers daily Hoosier agricultural activities exclusively by satellite for key Indiana radio stations, in addition to national and midwestern farm news hosted by Orion Samuelson and Max Armstrong.



Max Armstrong, Mike Perrine and Orion Samuelson (left to right) are the team of experienced farm broadcasters for AgriVoice-Indiana.

On this weather, news, commentary, interviews, agriculture positions, all designed to give the advertiser's message and a single invoice.

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Christal Radio

Average U.S. farm prices for selected fertilizer materials

(\$ per ton)

Year	Anhydrous ammonia (82%)	Triple superphosphate (40-46%)	Diammonium phosphate (18-46-0%)	Potash (60%)	Mixed fertilizer (6-24-24%)
1984/May	280	231	271	147	217
1985/May	252	203	240	128	192
1986/Apr	225	190	224	111	179
Oct	174	182	205	107	173
1987/Apr	187	194	220	115	176
Oct	180	206	231	135	183

Source: National Agricultural Statistics Service/USDA Fertilizer Dealer Survey January, 1988

storms to the north and east, away from prime crop-growing regions in Canada and Mexico, as well as the United States.

While this seems to be the general reasoning to explain the drought, scientists have provided few answers concerning how long this combination of weather factors will last. Predictions from the National Weather Service in late June, though, indicated little change in the drought situation through mid-July. So problems of lower crop yields, volatile commodity prices and transportation and export difficulties may very well intensify in the last half of '88.

Already, the drought is producing fears of economic disruption far beyond the farm sector. There is concern that the possibility of higher food prices could power an upswing in inflation. The barge industry on major rivers through the farm belt is losing time and money because of tie-ups and lighter loads brought on by drought-produced

low-water conditions. And the list of new economic problem areas lengthens with each additional day of drought.

Meanwhile, government officials and farm belt politicians are considering options for a wide range of drought assistance programs. So far, more than 850 counties in 18 states had been declared disaster areas by mid-June, triggering some assistance programs.

President Reagan has appointed an interagency task force to deal with the drought situation. And last month, Secretary of Agriculture Richard Lyng gave the green light to farmers in over a dozen moisture-shy states to harvest hay on idled acreage set aside under the government's Conservation Reserve Program.

Possible cutbacks in the government's export enhancement pro-

gram are also being considered, if drought conditions intensify. With the prospect of unpredictable supplies of farm commodities available for export, some adjustment of the subsidy program to U.S. exporters, covering the difference between world market and higher U.S. prices, may be necessary.

The northern tier of big farm states across the Plains and the midwest seem to be suffering the most. Crops in much of the Corn Belt and in the south and southeast are reported to be making some progress with the help of moisture in the soil.

In Kansas at mid-June, observers indicated much of the winter wheat crop might still be harvested without extensive loss. The Department of Agriculture at the same time, however, was cutting its yield forecast for winter wheat to

Acres planted/ principal field crops

Leading States/ 1987

(Thousand acres)

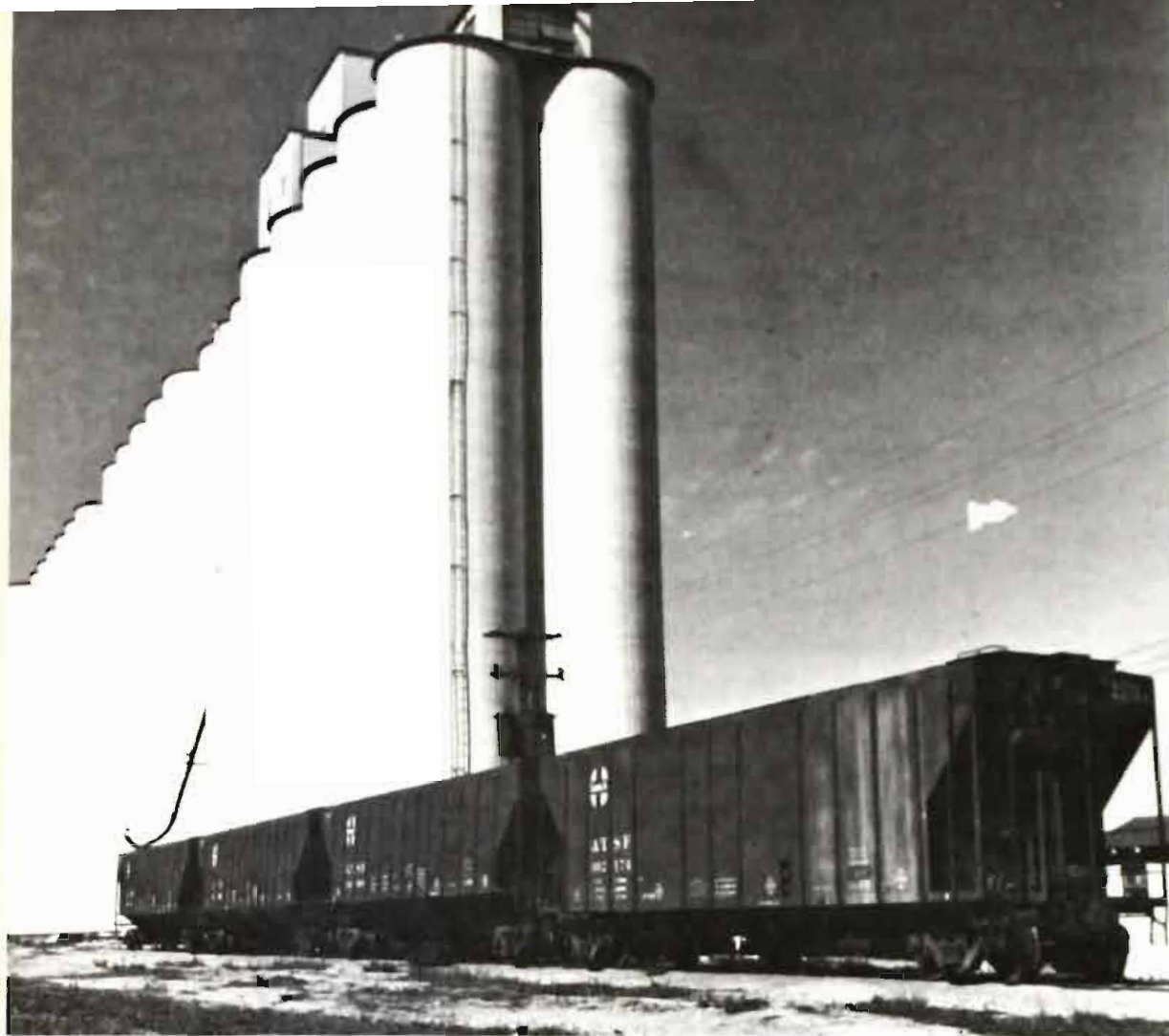
U.S. total/304.5 million

Rank	State	Amount
1	Iowa	24,586
2	Illinois	22,059
3	Kansas	20,267
4	North Dakota	20,163
5	Minnesota	19,305
6	Texas	17,636
7	Nebraska	16,477
8	South Dakota	15,167

Source: USDA/ERS May, 1988.

Kansas' winter wheat may be harvested without extensive loss.





Rail-shipping rates are on the rise.

1.57 billion bushels—a drop of about 50 million bushels, or 3%, from month-earlier estimates.

State and federal officials said drought and disease had caused serious damage to wheat crops in the Dakotas and Montana in May. Even with a break in the drought, observers believe 40 to 50% of the Northern Plains wheat crop has already been lost.

The situation is not quite as grim

in some sections of the Corn Belt, where a scattering of brief thunderstorms added a bit of moisture last month. Early-season drought damage to the corn crop has produced estimates of a drop in yields of 10%. But that figure could rise, say corn crop observers, if dry weather continues into mid-July.

Futures trading in farm commodities has reflected the current uncertainty concerning yields for

specific crops. Corn and soybean futures hit daily limit increases through the early part of June. Wheat futures prices moved up and down.

There's little doubt that yields for all major crops will drop this year because of the historic early-season drought. Midway through 1988, with much of the growing season still ahead, there remain big question-marks concerning the level of future shrinkage in crop yields as they continue to be impacted by dry weather.

Based on acreage planted this spring, the Department of Agriculture issued early estimates for corn of 121 bushels an acre, or 7.3 billion bushels nationwide. Now crop analysts are slashing their corn-yield estimates sharply.

Soybean yields

Observers are certain that soybean yields will also drop, though the soybean crop is generally planted later than corn and is not in as critical a growth stage at this time of year. Late last month, yield estimates had been cut back at least 10% for soybeans. With no significant break in the drought in sight—at least through much of July—those estimates undoubtedly will continue to change.

By late June, no widespread damage had been reported to the cotton crop—concentrated in the

Fertilizer use on selected U.S. field crops

Crop/Year	Acres receiving %			Application rates lbs. per acre			
	Any fertilizer	N	P ₂ O ₅	K ₂ O	N	P ₂ O ₅	K ₂ O
Corn for grain							
1986	96	95	84	76	132	61	80
1987	96	96	83	75	132	61	85
Cotton							
1986	80	80	50	39	77	44	50
1987	76	76	47	33	82	44	45
Soybeans							
1986	33	18	29	31	15	43	71
1987	30	15	25	28	20	47	75
All wheat							
1986	79	79	48	19	60	36	44
1987	80	80	50	15	62	35	43
Sorghum							
1987	85	85	47	17	79	37	40

Source: USDA/ERS January, 1988

Net cash farm income

Leading states/ 1986

(million \$)

U.S. total/\$51 billion

Rank	State	Amount
1	California	\$5,034
2	Iowa	3,596
3	Texas	2,984
4	Illinois	2,727
5	Nebraska	2,674
6	Minnesota	2,625
7	Florida	2,261
8	Wisconsin	2,102

Source: USDA/ERS May, 1988

Mississippi Delta—but continuing drought conditions could adversely affect cotton yields, too. Consequently, futures prices for cotton continued to rise by their daily permissible limits late last month.

Economic uncertainty is mushrooming with every new hot, dry dawn across the farm regions of the country. Farm producers naturally won't benefit from high commodity prices if they've little to sell. So bankers, agribusiness suppliers and those involved in farm real estate are bracing for a much less optimistic period in '88, and on into '89, than had been forecast at the start of the year.

The Farm and Industrial Equipment Institute, in its 1988 "State of the Industry" survey of member companies, tallied first-of-the-year responses, indicating that the industry had "turned the curve" in sales and that dollar sales of farm equipment could rise as much as 5% this year.

Direct govt. payments to farmers

Leading states/ 1986

(million \$)

U.S. total/\$11.8 billion

Rank	State	Amount
1	Iowa	\$1,161
2	Texas	978
3	Illinois	883
4	Kansas	871
5	Nebraska	868
6	Minnesota	802
7	North Dakota	700
8	Indiana	411

Source: USDA/ERS May, 1988

Farm Broadcast '88

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New Conclusive Farm Audience Research Confirms
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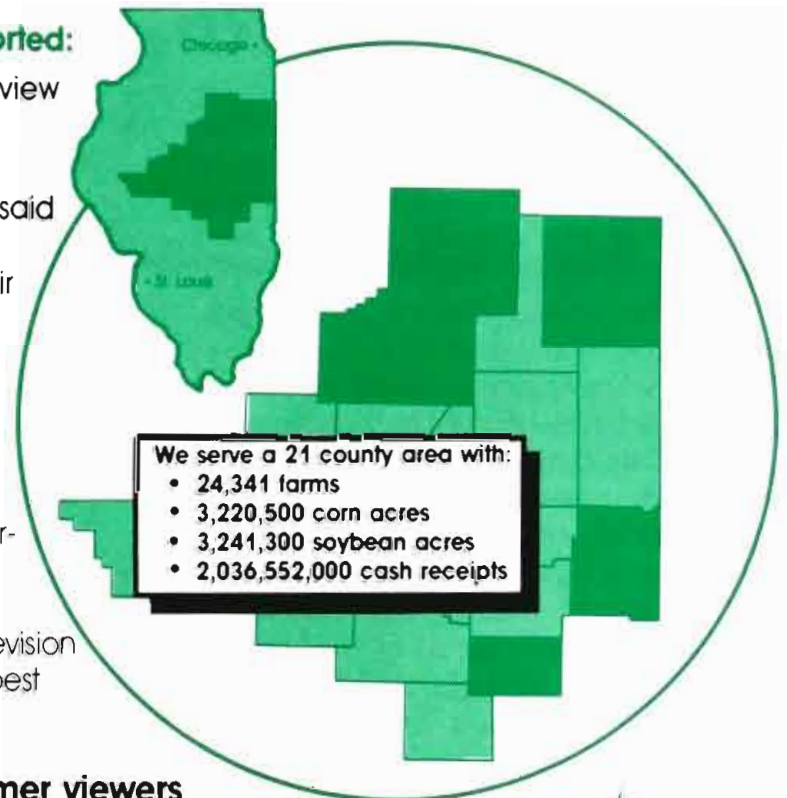
A recently completed survey of 475 Class I farmers in the Champaign-Danville-Decatur-Springfield ADI proves that WCIA outdelivered the competition combined in the key news time periods!

TIME PERIOD	WCIA PROGRAM	WCIA CHANNEL 3 CLASS I FARMER	
		RTG.	SHR.
12-12:30PM	Noon News	37.7	82.0%
5-5:30PM	Newscope	9.4	52.5%
6-6:30PM	Early News	40.8	54.7%
10-10:30PM	Late News	34.1	49.3%

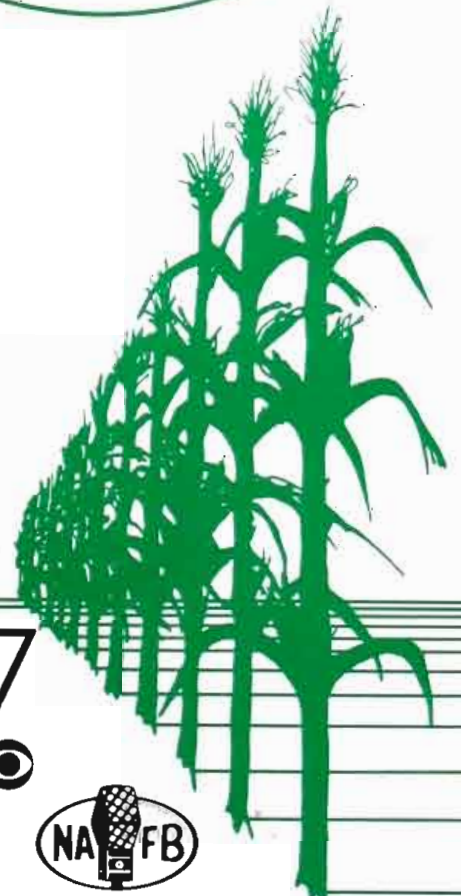
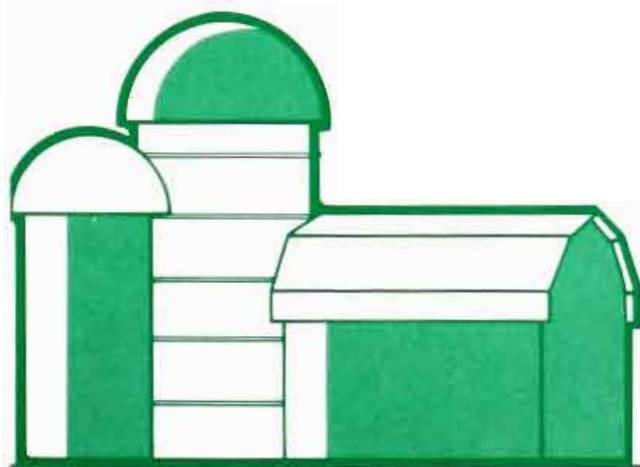
In addition, the study reported:

- **78.3%** of the respondents view WCIA's University of Illinois Basketball telecasts.
- **68.2%** of the respondents said WCIA's NAFB Farm Director, Colleen Callahan, was their favorite farm broadcaster in the market!

WCIA, Channel 3, A CBS Affiliate, is committed to agriculture and the Champaign-Danville-Decatur-Springfield farmer with more farm programming than the competition, the leading television farm broadcaster, and the best coverage of the market.



WCIA delivers more farmer viewers than the competition combined!



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Pesticide demand/projected 1988 use by U.S. field crop farmers

(million pounds/active ingredients)

Crop	Herbicides	Insecticides	Fungicides
Row:			
Corn	192-212	23.8-26.3	.06
Cotton	17-19	16.6-18.4	.18
Grain sorghum	11-12	1.8-2.0	0.00
Peanuts	5-6	1.1-1.2	5.46
Soybeans	99-109	8.7-9.6	.06
Tobacco	1-2	2.2-2.4	.30
Total	325-360	54.2-59.9	6.12
Small grains:			
Barley and oats	7-8	.2-.3	0.00
Rice	11-12	.5-.6	.07
Wheat	13-14	1.7-1.9	.73
Total	31-34	2.4-2.8	.80
Total	356-394	56.6-62.7	6.92

Source: USDA/ERS January, 1988

Tractor sales, in fact, were reported to have increased between 12 and 13% in the first five months of the year. But some equipment dealers are already cutting back fall orders in anticipation of a drop in sales brought on by the drought.

Meanwhile, bankers in farm regions are worrying anew about the financial health of their customers, as the prolonged, intense dry weather and heat brings new economic stress on into the harvest of a year that was hailed at its start as one of the best in a decade. The farm financial stress of the last few years has brought upheaval and change to much of agricultural

banking. And the effect of the drought could trigger more.

In May, the Farm Credit Administration closed the insolvent federal Land Bank of Jackson, Miss.—the first such closing since the land bank system began operations in 1917. The closing has affected farm producers throughout Alabama, Louisiana and Mississippi—the three-state district covered by the Jackson bank.

Two months earlier, three other Farm Credit System banks—those in St. Paul, Louisville, and Omaha—asked the government for financial assistance. The bank in St. Paul is the largest in the 12-district

land bank system.

Assistance programs are underway, but—even before the drought—officials said large portfolios of bad loans, high operating costs and declining loan volumes were posing systemwide problems.

There are concerns, too, that the uncertainties of the drought will have an adverse effect on the value of farmland—a situation that appeared to be turning around at the beginning of '88. Early forecasts indicated land prices in sections of the Corn Belt might continue an upward swing by 5 to 6% this year. Now, however, the value of farmland is just one more big question-mark facing farm producers and financiers as a result of the weather.

Other agribusiness industries—fertilizers, farm chemicals and

Feed situation is becoming more critical for livestock producers

Hogs & pigs

Leading states/Dec. 1, 1987

(Thousand head)

U.S. total/53.8 million head

Rank	State	Amount
1	Iowa	13,800
2	Illinois	5,300
3	Indiana	4,600
4	Minnesota	4,350
5	Nebraska	4,000
6	Missouri	2,950
7	North Carolina	2,500
8	Ohio	2,150

Source: USDA/ERS May, 1988.



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BOX 119

TOPEKA, KANSAS 66601

Seed use/major U.S. field crops

(000 tons)

Crops	1986	1987	1988 (Projected)	% change 1986-1987
Corn	546	437	442	-20
Sorghum	48	45	42	-6
Soybeans	1770	1743	1770	-2
Barley/oats	1128	879	875	-22
Wheat	2790	2520	2400	-10
Rice	130	130	150	0
Cotton	130	133	150	2
Total	6542	5887	5829	-10

Source: USDA/ERS January 1988

seed—are also bracing for the worst after beginning the year with optimism. In a message to member companies of the Fertilizer Institute in May, its president, Gary Myers, urged the industry to “demonstrate our commitment to sustain this recovery.”

In that message, Myers listed many of the positive factors supporting the optimism shared by

most agribusiness leaders before disastrous weather began to change the U.S. farm picture to one clouded with uncertainty and caution. Noted Myers this spring, “The Agriculture Department reports that planted acres rose slightly this year, confirming many of the other positive factors evident in agriculture today.”

“Likewise,” he said, “as car-

ryover stocks of key grains’ are dropping, hopes for a steady agricultural resurgence are rising. Market prices for most commodities are strengthening, as are export indicators. Farm debt is being effectively whittled away, and a new optimism—tempered by the lessons of the recent past—is now apparent in the farm sector.”

An accurate assessment of the

U.S. pesticide production/inventories/exports/and domestic availability

Item	Quantity (active ingredients) Million pounds		Projected change 1987-1988 %
	1987	1988	
Herbicides:			
Production	421	394	-6
Carryover	199	153	-23
Imports	34	33	-3
Exports	134	157	17
Domestic avail.	520	423	-21
Insecticides:			
Production	169	155	-8
Carryover	57	62	9
Imports	7	9	29
Exports	68	74	9
Domestic avail.	165	152	-8
Fungicides:			
Production	52	57	10
Carryover	6	5	-17
Imports	3	4	33
Exports	25	22	-12
Domestic avail.	36	44	22
All pesticides:			
Production	642	606	-6
Carryover	262	220	-16
Imports	44	46	5
Exports	227	253	11
Domestic avail.	721	619	-14

Source: USDA survey/basic pesticide manufacturers (producing major portion of all U.S. pesticides) December 1987

Farm equipment retail sales

January–March '88 vs. year earlier

Type of equipment	Unit retail sales		% change
	1988	1987	
Farm wheel tractors			
2-wheel drive			
40 & under 100 HP	7,749	5,514	40.5
100 & under 140 HP	1,167	665	75.5
140 HP & Over	2,922	1,218	139.9
Total 2-wheel drive	22,226	17,740	25.3
4-wheel drive			
Under 200 HP	252	117	115.4
200 HP & Over	439	204	115.2
Total 4-wheel drive	691	321	115.3
Total farm wheel tractors	22,917	18,061	26.9
Combines (self-propelled)	1,401	314	346.2
Balers			
(Bales under 200 lbs)	632	529	19.5
Forage Harvesters			
(shear bar type)	252	225	12.0
Mower conditioners	1,346	1,101	22.3
Windrowers (pull canvas & powers units)	248	164	51.2
Combination grinder-mixers	893	637	40.2

Source: Farm & Industrial Equipment Institute, May, 1988

farm situation in the early months of '88, his message—and those of other agribusiness spokesmen—will certainly take on new tones as all sectors of American agriculture begin to cope with the economic fallout from this historic drought. Meanwhile, the government is being pressured to react. Some of this early response was detailed earlier in this report. But farm leaders are calling for speedier, more immedi-

ate, assistance. Midway through last month, however, Secretary of Agriculture Richard Lyng cautioned the Senate Agriculture Committee against adopting drought-relief legislation in a hurry. He told the lawmakers that it was still too soon to say we have a grim disaster nationwide, but, he said, "the potential is there."

The Agriculture Secretary did agree to meet once a week with a

bipartisan group of House and Senate Agriculture committee members to begin development of a plan for drought relief legislation. At that hearing, the chairman of the Senate Agriculture Committee, Patrick Leahy (D-Vt.) released the results of a USDA survey, indicating that at least 25% of the soybean crop was in "poor or very poor" condition in Mississippi, Louisiana, Arkansas and Tennessee as

Livestock products/ cash receipts from marketings

Leading states / 1986

(million \$)

U.S. total / \$71.6 billion

Rank	State	Amount
1	Texas	\$5,516
2	Iowa	4,982
3	California	4,556
4	Nebraska	4,260
5	Wisconsin	4,164
6	Kansas	3,447
7	Minnesota	3,395
8	Pennsylvania	2,239

Source: USDA/ERS May, 1988

Cattle producers see declining midyear prices



U.S. Farm equipment

Retail sales and forecasts, 1987-1989

Type equipment	1987 Est. units	1988 Forecast	1989 Forecast
2WD farm tractors			
Under 40 HP	60,333	60,000	60,000
2WD farm tractors			
40-100 HP	30,000	31,210	32,750
2WD farm tractors			
100 HP & over	14,500	14,500	15,300
4WD farm tractors	1,600	1,800	1,900
All farm tractors	106,433	107,510	109,950
Self-propelled			
combines	6,700	6,890	7,200
Cornheads	3,800	4,100	4,250
Windrowers	1,600	1,500	1,600
Mower-conditioners	11,193	11,488	11,483
Balers (bales under			
200 lbs.)	5,400	5,500	5,550
Forage harvesters	2,300	2,400	2,450
Grinder mixers	2,175	2,050	2,000

Source: State of the Industry 1988, Farm & Industrial Equipment Institute

well as Missouri, Indiana and Ohio.

The survey also showed that a quarter of Mississippi's cotton crop was in poor or very poor condition, while nearly half the crop in Louisiana was listed as "poor."

The June 12 survey rated 20% of the sorghum crop as in poor or very poor condition in at least four states—Illinois, Missouri, Mississippi and Louisiana. In the northern tier of farm states, conditions are even worse. Even in mid-June, fields of spring wheat in Montana, the Dakotas and Minnesota were in poor or very poor condition—70% of the crop in Minnesota, 62%, in North Dakota and Montana.

Late last month, Leahy again called for a careful, rather than a

panic approach to drought-relief legislation. "I think," said Leahy, "the immediate impulse—and I believe it's a natural one—is to just go in for legislation right away."

"But," he added, "if we had 40 or 50 pieces of legislation out there, no matter how good some of them might be, the effect of too many, is that none go anywhere. What I would like to do is take the ideas which may be introduced as legislation, along with individual suggestions from Senators or House members, and put them into one consensus piece of legislation."

"I hope," he said, "that's what our task force is about, because that's why I proposed the task force in the first place." □

Stunted corn crop



Farm energy expenditures

(Billion \$)

	1985	1986	1987 (Prelim.)	1988 (Forecast)
Fuels and oil	6.6	4.8	4.5	4.5
Electricity	2.2	2.1	2.2	2.3
Total	8.8	6.9	6.7	6.7
% change from previous year		-22	-3	0

Source: USDA/ERS January 1988

An outlook interview with WEFA Group's Pottorff

In a special interview late last month, TV/RADIO AGE asked Richard Pottorff, director of agriculture for The WEFA Group, for his observations on some of the factors he's watching closely, as the '88 drought continues to produce problems and uncertainty for both the farm producer and his suppliers.

"Soybeans," reports Pottorff, "are near the top of the list. We've been drawing down our soybean stocks significantly over the past two or three years, and the supply situation would be serious this year—even without the drought."

"Now, we believe there'll be a very significant decrease in production—probably on the order of 15 or 20%. Supplies, then, will be extremely tight. We should continue to see some dramatic increase in prices, plus a great deal of uncertainty about the availability of supplies, well into next year."

Wheat stocks down

"Wheat stocks have also been reduced significantly," Pottorff continues, "Two years ago, we had 1.9 billion bushels in carryout. This year, we're looking at 1.2 billion. By the end of '88-89, the supply is expected to fall below a billion bushels—again, even without the drought."

"When you compare," he notes, "carryover stocks of wheat of, say, 850 million bushels—on a demand base of 2.5 billion, roughly a 30 to 35% stock-to-use ratio, that's a whole lot different than 150 million bushels or less on a 2 billion bushel demand level for soybeans. So, the tightness of supply is significantly less critical for wheat than for soybeans."

What about corn? Replies The WEFA Group director of agriculture, "Even though we've reduced our corn carryover stocks significantly over the last couple of years, we still have a lot of corn available. Even with the drought, we believe we'll still have carryover stocks of almost 3 billion bushels of corn at the end of this year."

Adds Pottorff, "That's down from almost five billion a couple of

years ago, and prior to 1982-83, we had never had 3 billion bushels in corn carryover supplies."

"We have made," he continues, "some significant progress in getting these stocks down, but we still have a lot of corn around. Consequently, there's not the concern about tightness or unavailability of supplies of corn, that we have this year for soybeans—and—to a lesser extent—for wheat."

Government cutback

Commenting on reports about possible cutbacks in the government's export enhancement program, Pottorff noted, "If the government has to scale back because of high cost, that will have real significance, particularly in regard to wheat."

"If you look," he points out, "at the crop year that just ended, we increased our wheat exports over the previous year by about 60%. You can trace nearly every last bushel of that to the export enhancement offers made just to the Soviet Union and China."

"If those sales had not been made, or were not made in the future because of cutbacks, the result would be a 400-500 million bushel decline in wheat exports. And

that's even before we consider the impact of higher prices, themselves, on demand, especially in developing countries."

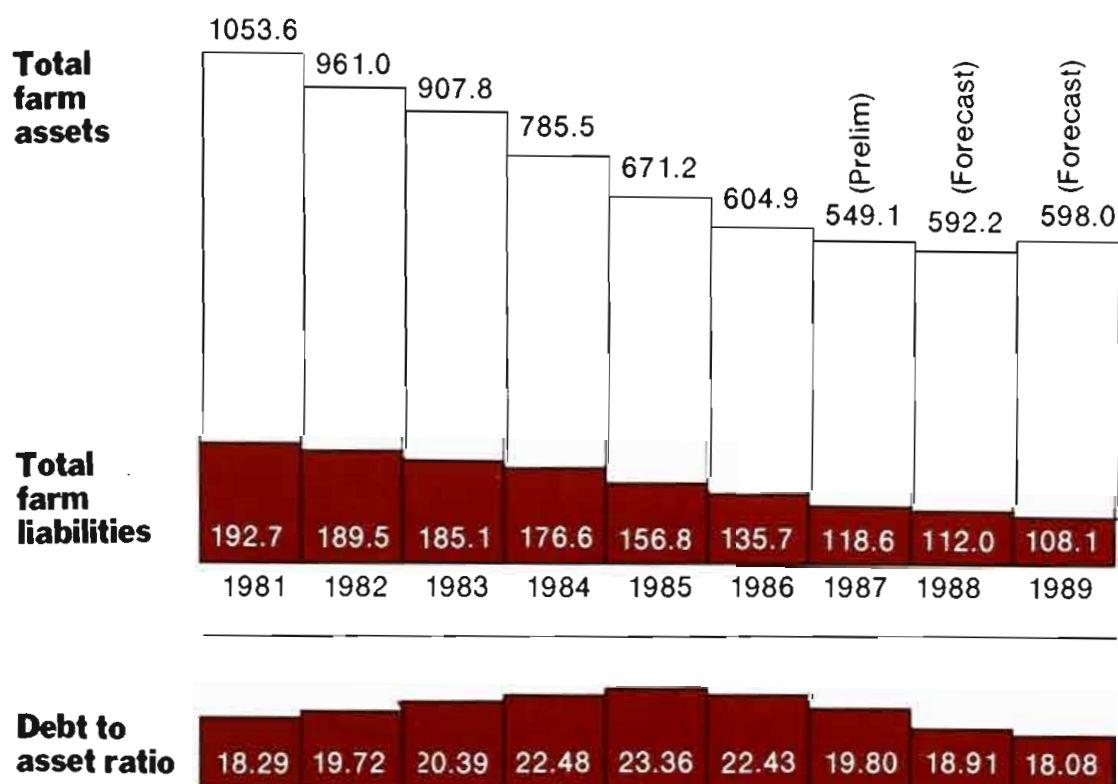
"So," emphasizes Pottorff, "uncertainty about the export enhancement program will be a critical factor in government decision-making that could affect the tightness of wheat supplies over the course of next year."

On the subject of government deficiency programs, The WEFA Group ag-economist forecasts lower payments both this year and next because of the effect of the drought. "Higher prices," he notes, "lower the deficiency payment rate, so payments will decline."

"What remains to be seen," Pottorff emphasizes, "is exactly what sort of drought relief measures may be put in place to lessen the impact of the drought." "I believe," he adds, "that, overall, government spending won't decline very much. Payments through drought relief programs should help to offset the lower deficiency payments."

Commenting on the livestock situation in relation to the drought, Pottorff told TV/RADIO AGE, "There has been some increase in both slaughter and feed-lot placements. Naturally, if you have no

U.S. farm balance sheet (Billion '82\$)



Source: The WEFA Group, June 1988

grass to feed your animals, and no other kind of forage, then you have to do something . . ."

"Right now, putting them in a feedlot is not a very attractive alternative. Current high feed costs mean that the breakeven price for cattle in feedlots is about \$77-78 a hundredweight . . . prices for fed cattle, about \$71. Clearly, there's not much incentive to put many animals on feed. And he adds, "Over the next few months, it should become an even less attractive alternative, and placements should continue to decline."

"We believe there'll be less fed beef coming to slaughter through early '89, and that's going to support prices." He notes that "the inventory of calves under 500 pounds, from which supplies of feeder cattle are drawn later in the year, was down 10% at the beginning of '88, from the previous year. So, we're getting to a point where there's an extreme tightening in feeder cattle supplies. And the impact of the drought is expected to strengthen prices significantly next year.

"But at the same time," says Pottorff, "I think we have to temper the idea that there may be wholesale cattle slaughter because of high prices, similar to what happened in '83."

"The drought then occurred after four years of expansion in the cattle herd, with considerably more cattle on hand than we have now, and prices much lower."

"Producers this year face a different supply-price situation. In

'83, feeder cattle prices stood at about \$65-70 per hundredweight, compared to the current level of \$90-100, expected to hold into '89." So, he feels there'll be more effort by producers to hold on to their cattle than there was in '83.

Food price inflation

On the much-discussed subject of food price inflation, as a result of the drought, the WEFA Group's director of agriculture shared this forecast: "I don't think there's any question that food price inflation will be higher than it would have been without the drought."

"But," adds Pottorff, "the impact of higher commodity prices is really diluted by a whole series of other factors and further diluted by the fact that food pricing contributes only about 15% of total inflation. Unless the drought becomes a whole lot worse than it is now, we expect food price inflation to be up only 1 or 2% higher than it would have been in the absence of the drought during the second half of this year and the first part of 1989." □

U.S. farm cash production expenses

(Billions in 1982 \$)

1981	119.7
1982	112.5
1983	108.8
1984	107.6
1985	98.1
1986	87.6
1987*	83.3
1988**	86.9
1989**	89.8

Source: The WEFA Group/June, 1988. * Preliminary.
** Forecast

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Dix Harper

Ray Wilkinson

Ken Tanner

Farm broadcast to the rescue

Diversification, marketing push recommended

When the weather gets bad—and it certainly has in 1988—the farm sector's "need-to-know" intensifies, requiring more information from meteorologists, commodity trading centers, farm extension offices, from transportation and marketing hubs, from every level of government.

This year as crop-parching, feed-killing weather persists through vital segments of the growing season, and over huge sections of the country, farm demand for nonstop agricultural and economic updating grows more critical with every new day of drought.

Radio and television stations and specialized farm networks—those with a genuine commitment to their unique audiences—are answering that demand not only with dollars but with programming and people dedicated to "living" their listeners business, not just talking about it.

Members of the National Association of Farm Broadcasters are the professionals who staff the stations and farm networks sharing this

commitment. So, TV/RADIO AGE takes its annual look at America's farm situation again this year, through the eyes of the national and regional officers of the NAFB.

In the southeast

From his post in North Carolina, this year's NAFB president, Dix Harper, director of agricultural productions for WRAL-TV Raleigh-Durham and for the TRN Farm News Network, shares some comments from the Agriculture Commissioners of North Carolina and Georgia, and a look at some new alternatives in agriculture.

North Carolina's Commissioner of Agriculture, James A. Graham, told the NAFB president one of the recent positive developments on the farm front in his state is the success of the "Goodness Grows in North Carolina" marketing program. Under the brand-identity licensing program, in which 90 firms are now involved, farm businesses gain the right to use the slogan, in labeling their product/or products, assuring the buyer it's a locally-

produced quality farm product.

"We've been working for 15 or 20 years," Graham told Harper, to diversify our farm products, so that we aren't forced to obtain income only from our major crop which is still tobacco. Now, we're number one in turkeys, number one in sweet potatoes and number two in cucumbers."

"As we continue our diversification effort," said the North Carolina Commissioner, "we're working to increase our turkey exports and develop new turkey products. And our hog production industry continues to grow. Of the eight largest hog operations in all America, four of them," reported Graham, "are here in North Carolina."

Harper, a 40-year member of the NAFB, is, himself, a leader in encouraging diversification and marketing expansion in the southeast. Continuing to emphasize the positive he sees in new approaches to agriculture, Harper shares interviews from a meeting in Iowa, where he discussed two interesting new ventures growing successfully in the south.

The watchword in setting up these new agricultural opportunities, Harper emphasizes, is to "find your market first." The farm broadcaster from Raleigh talked first to Mrs. Winnie Hawthorne, of Sumter, S.C. She now harvests crayfish in her farm ponds, with a yield of 1,000 pounds per acre. Prices range from \$1.50 a pound, to \$2.00 for the larger size.

In her interview with Harper, she admitted she didn't research the market before setting up her operation but feels that the possibility of success is much greater if the market is targeted before creating any type of new farm business.

That was done by extension agent Larry McPheeters of Halifax County, Va. as he worked with frustrated tobacco farmers, to organize the Southside Virginia Pro-

In the Corn Belt, *Marla Behrends, NAFB regional v.p. and farm director at WKAN Kankakee, Ill., finds the drought-produced economic pressure spreading to other businesses in a farm-based economy.*



ducers Cooperative.

Looking for a supplementary product to the flue-cured tobacco produced in the region, McPheeters and farm producers completed research showing that produce production had potential, since the area was within 500 miles of much of the national population. Operating for only about three years, the cooperative now markets six different produce items, and involves 135 producers from a 17-county area.

In Florida

Moving further southward into one of the top 10 farm states in the country, the NAFB's regional vice president for the southeast, Cindy Zimmerman interviewed both the chairman of the Cattlemen's Beef Promotion and Research Board and Florida's Commissioner of Agriculture for this year's round of regional reports.

Zimmerman, of the Independent Florida Agrinet, based in Ocala, is farm director of the first independent radio farm broadcasting system in the state. In operation since 1985, Agrinet now delivers a half-dozen programs a day via satellite to 37 stations around the state. Specialized programming focuses on both the northern and southern Florida farm regions, on the citrus and livestock industries, on agribusiness developments, and, of course, on weather.

Suffering somewhat less from the intense drought earlier this year, its apparent—in these reports from the southeastern United States—that farm producers throughout the region are engaged



Former Secretary of Agriculture Bob Bergland, r., now exec. v.p. of National Rural Electric Cooperatives Assn., is interviewed by Mark Vail, next NAFB pres. and farm director, Kansas Ag Network.

in a push to better market the commodities they produce directly to the consumer and to new markets overseas. At the same time, diversification efforts are also moving higher on the action priority list.

Jo Ann Smith, a Florida cattle producer and chairman of the Cattlemen's Beef Promotion and Research Board, made this clear as she outlined reaction to the national beef "checkoff" program.

"I think," she told Zimmerman, "that the agricultural community has more or less awakened, and is now playing catch-up, after only recently beginning to realize the need for promotion and research in marketing their commodities."

"Like the dairy industry," added Smith, "beef producers are faced with the same kind of consumer concern about cholesterol and fat. It's up to us in production to supply consumers with the type of product they want. Our current, 'Beef: Real Food for Real People,' campaign will continue; and, now with long-term funding, we can certainly ex-

pand our research. We'll continue to listen and respond to both the producer and the consumer."

Florida's Agriculture Commissioner Doyle Conner told the NAFB's southeastern vice president, "If we continue to do the things we've done traditionally, we're not going to be able to pay back the banks. So, we're looking at new marketing alternatives, ways to develop value-added crops, expansion of international markets for our products."

"Because of our growing population in Florida," said Commissioner Conner, "there's a growing domestic market for us to tap right here at home. We've set up a new farmer's market at the intersection of some of our interstate highways where producers can transfer their products directly to truckers, for quick transfer to nearby markets. And we're enthusiastic about that type of farm marketing approach."

From Louisiana

Swinging westward across the southern tier of farm states, the south central regional vice president for the NAFB, Ray Forcier, contributes interviews updating financial and drought developments in his area—one of those hit hardest by the lengthening drought.

From his post as farm news director of 50,000-watt clear channel KWKH in Shreveport, Forcier directs a heavy schedule of daily farm broadcasts to a primary coverage area of more than 71 counties throughout Louisiana, east Texas and Arkansas.

In a conversation with Darrell

Diversification and marketing are emphasized by NAFB pres. Dix Harper, l., of WRAL-TV Raleigh-Durham, seen here interviewing exhibitors at a farm show.

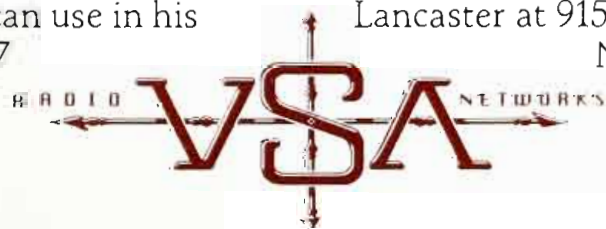




VSA RADIO NETWORK IS HIS SIDEKICK EACH WORKDAY.

Meet your Texas farmer/rancher. He's put in a half day before most of us have had our first cup of coffee. And riding shotgun on his daily rounds is the VSA radio network. He prefers our programming for straight news he can use in his operations, according to the 1987 Doane's Study. And he listens hard, to the tune of \$8 billion

spent on ag products and services each year! (1986 Texas Dept. of Agriculture County Statistics) So when you want to talk to him, you need to talk with us. Phone Roddy Peeples or Curt Lancaster at 915-944-1213. Or write to VSA Radio Network, Route 5, Box 5207, San Angelo, Texas 76904.





Florida's first independent radio farm broadcast system, Florida Agrinet, satellites programs to 37 stations. Cindy Zimmerman, above, is farm director and an NAFB regional v.p.

Jans, vice president of the Federal Land Bank office in Shreveport, Forcier provides some followup on developments since shutdown of the Federal Land Bank serving the area, in Jackson, Mississippi. Jans told the NAFB regional vice president, "During the weekend following the May 20 closing, inventory was taken for the receiver at the 80 offices of the bank in Alabama, Louisiana and Mississippi."

"At the start of the following week," he continued, "we were able to resume serving our customers pretty much as we had prior to the closing. Since then—with the exception of new loans, which we hadn't been making for some time, anyway—basically, it's been just about business as usual."

Forcier discussed crop prospects for TV/RADIO AGE with Marion Faris, county agent for Louisiana's Caddo Parish. "Our cotton crop," said Faris, "is already suffering from dry weather, and—if we don't get some additional rain on down the line—there'll be additional serious damage. Because of the dry weather, though, we don't see as much of the usual problems from pests like the boll weevil."

From Illinois

Moving north, along the low-water, barge-clogged Mississippi into the Corn Belt, Marla Behrends—NAFB regional vice president for the north central area, shares a look at how drought-produced economic pressure is spreading to other businesses in a farm-based economy.

Behrends, farm director of

WKAN in Kankakee, Ill., near the Indiana border, talked to nursery and landscaping businesswoman Nancy Tholen, who reports that late last month, her firm was forced to invest in irrigating equipment in an emergency effort to save a new crop of yews (evergreen trees), planted on recently-purchased acreage.

"Not only are we concerned about recovering the cost of the new land," Tholen told Behrends, "but now we've added the additional cost of irrigation and equipment. We've also cut back considerably on our sod-laying and landscaping operations, and customer traffic is way down because no one is buying our type of products in the middle of a drought like this."

"Already," Tholen told the NAFB vice president, "we've swallowed quite a bit, and—since plantings this year won't be ready for market for three more years—what we lose now will affect our business three years down the

road."

WKAN's farm director also reports that the area's corn crop was hit by an unusual frost on June 8—still another weather negative in a disaster year.

From Minnesota

Further north, in Minnesota, another big farm state hit hard by the drought, the 1988 national vice president of the NAFB—Lynn Ketelsen, farm services director of the Linder Farm Network in Willmar, Minn.—highlights some positives for those farm producers who are able to survive the drought.

Ketelsen interviewed national Ethanol Commission spokesman, Larry Johnson, who reports that new uses for corn-based ethanol should spur the growth of a new domestic market for the state's farmers. A 10-million gallon ethanol production facility, operated by Minnesota Corn Processors, is expected to provide a base for new products like biodegradable plastics and a de-icer that eliminates the damage of salt-based de-icing materials.

Johnson, who's been dubbed the ethanol "answer man," told the NAFB vice president, "We're working to create a new industry right in the rural areas where the crop is, replacing oil-derived products with products made from corn."

In another report, Ketelsen learned details concerning a new printing ink made from soybean oil that's now being used by a number of major farm magazines and news-

Corn-based ethanol should spur growth of a new domestic market, Lynn Ketelson, l., farm services dir. of Linder Farm Network, Willmar, Minn., learns in interview with Ethanol Commission spokesman.



MAJOR BROADCAST MEETINGS, SEMINARS AND CONVENTIONS

1988

September 6-9	4th Pacific International Media Market, Sydney, Australia
September 14-17	NAB Radio '88, Washington Convention Center September 5 Issue
October 14-18	MIPCOM, Cannes October International Issue
October 17-19	Television Bureau of Advertising Annual, Meeting, Las Vegas October 17 Issue
October 25-28	Community Broadcasters Association, Caesar's Palace, Las Vegas October 17 Issue
November 7	London International Advertising Awards, Royal Lancaster Hotel, London
November 9-13	National Association of Farm Broadcasters, Kansas City
November 30-December 3	Radio & Television News Directors Association, Convention Center, Las Vegas November 28 Issue
December 7-9	Western Cable Show, Anaheim Convention Center November 28 Issue

1989

January 4-8	Association of Independent Television Stations Century Plaza, Los Angeles, December 26, 1988 Issue
January 24-27	NATPE International Convention, George Brown Convention Center, Houston January 23 Issue
February 2-5	Radio Advertising Bureau Managing Sales Conference, Loew's Anatole, Dallas
April 9-12	Broadcast Financial Management Association, Loew's Anatole, Dallas April 3 Issue
April 21-26	MIP-TV, Cannes April International Issue
April 29-May 2	National Association of Broadcasters, Las Vegas Convention Center April 17 Issue
May 6-13	Annual Golden Rose of Montreux Festival, Palais des Congres, Montreux
May 21-24	National Cable Association, Dallas Convention Center May 15 Issue
June 17-23	International Television Symposium, Montreux
June 21-25	BPME/BDA Association, Renaissance Center, Detroit June 12 Issue

papers in Minnesota. "We're also finding new uses for soybean oil," said Jim Palmer, executive director of the Minnesota Soybean Association, "finding it efficient as a carrier in pesticides and as a dust-reducing element in hog feed."

"We're working," he adds, "to become not only providers of food to the nation but providers of renewable resources for new products in other industries."

From Kansas

Dropping down into the big wheat and livestock state of Kansas, the next president of the NAFB, Mark Vail, farm director of the Topeka-based Kansas Agricultural Network, provides this report, as he and his staff monitor the drought for farm listeners, in broadcasts via satellite, to 35 stations in the central and southern Plains.

The situation in late June, Vail indicated to TV/RADIO AGE, seemed to be less critical because harvesting of winter wheat—the big crop in the state—was speeding up, as drought conditions intensified. "Our situation," reports Vail, "was helped by the fact that many sections of the state had some very late winter blizzards that dumped from 10–14 inches of snow, giving those areas a little better moisture base earlier in the year."

He adds, however, that "we're going to have a somewhat smaller wheat crop than was expected in the middle of May; not only because of increasingly dry conditions, but because of disease problems and fewer acres planted."

Mike Hansen, *WOW Omaha's farm director.*



In a conversation with Todd Domer, of the Kansas Livestock Association, Vail discussed the outlook for the state's cattle producers, in light of the marketing effort created by the beef checkoff program. Reported Domer, "A lot of consumers have seen the advertising and reports of the less serious health impact of cholesterol in beef. This past year, beef competed effectively against record supplies of cheap poultry and pork, indicating some change in consumer demand."

Both, however, see grim days ahead because of drought-produced shortages and high prices for feed.

From Nebraska

To the north, in areas hit even harder by the lengthening drought, the NAFB's regional vice president for the north central states, Mike Hansen, farm director of WOW Omaha, discusses a worsening outlook with specialists at universities in both Nebraska and Iowa. One of four stations of Wichita-headquartered Great Empire Broadcasting reaching farm audiences from Springfield, Mo. and Shreveport, La., as well as Wichita and Omaha, WOW farm broadcasting covers a 200-county area in six states.

William Edwards, an economist at Iowa State University, told the WOW farm director; "Less grain to sell and higher feed expenses for livestock producers will bring increasingly serious problems as the drought intensifies."

"Deficiency payments," he said, "of course, will be lower. But diversion payments won't be affected by lower yields." One positive factor, though, notes Edwards, is the fact that more farmers have been protecting themselves with federal multiperil crop insurance. "Nearly 40% of the crop in Iowa," he told Hansen, "is now covered by this type of insurance."

In Nebraska, many farmers started 1988 with continuing debt problems, and Larry Bitney, a farm management specialist at the state's university in Lincoln, pointed out, in an interview with Hansen, that they'll be hardest hit, as a result of the drought.

"Some 10 to 15% of our farm pro-



Taylor Brown, *Northern Ag Network, Billings Mont.*

ducers in Nebraska," said Bitney, "are still burdened by a lot of debt, and carryover problems from the recent farm debt crisis."

From Montana

In the last of this 1988 series of regional reports provided by officers of the National Association of Farm Broadcasters, the group's regional vice president for the west, Taylor Brown, adds a final perspective from his post as president and farm director of the Northern Ag Network, headquartered in Billings, Mont.

In addition to the drought, Brown says, crop producers throughout his area have been forced to cope with other adversities—outbreaks of problems such as wheat streak mosaic and the Russian wheat aphid. And, he adds, "this is another bad year for grasshoppers." Discussing the reaction of agribusinessmen in his area to the grim months ahead, Brown passes on these comments from regional executives in the feed and ag chemical industries.

Both Don Carter, regional manager for Loomis Feed Supplements, based in California, and Harold Schultz, vice president and general manager for West Chem Ag Chemicals, emphasized the need to improve contact with their customers, strengthening the ability to share information honestly and with credibility.

Said Carter, "we must clearly define changing needs, particularly in bad times like this. If we give enough of our customers exactly what they need and want, we'll end up getting what we want." Reporting this to be "the most difficult year for his company since 1970," Schultz adds that "if a grower has practiced chem fallow to some degree in this toughest of years, he's going to end up with a better crop than his neighbor who hasn't." □

For advertisers, the biggest pests in their cornfield are environmentalists

Things far from dry in farm broadcast advertising crop

By GEORGE SWISSHELM

Outside the dry belt, still hoping for rain at presstime, the plusses have started to outweigh the farm economy's minuses for the first time in years. With somewhat higher prices for farm products, even farm machinery sales have started to climb out of the cellar.

Nobody likes to be quoted, but some farm broadcasters expect more acres of corn to be planted next year to make up for this year's drought losses. That should translate into more seed, fertilizers, herbicides and insecticides used. And that could mean more advertising by the chemical companies for 1989 spring planting. Farm chemicals are by far the biggest ad category in agriculture.

Higher farm prices haven't boosted farm radio's fortunes yet,

but its sellers are saying, "Wait 'til next year,"

Ag activity on television on the other hand, has seldom been better than just before this year's spring planting. It was so good in fact, it could have turned out to be too much of a good thing for both television and the farm chemical advertisers who made it happen.

Television being the mass medium it is, all those herbicide and pesticide commercials in the evening news were also seen by almost as many environmental activists as farmers. The outcry left at least some ag chemical executives worried about their image. Some reacted with new corporate image spots to replace their product hard sell. Others talk about less TV exposure, at least in local news and other evening dayparts when all those environmentalists are watching.

Still others talk about the need

for more specifically farm-directed television programming in dayparts like early morning, when most environmentalists are still sleeping.

Ed Clement, president, Fletcher/Mayo Associates, St. Joseph, Mo., agrees that "The chemical manufacturers are concerned. They realize they have an image problem among some of the general, non-farm public. But TV does such a great job of building fast awareness of new products, I think the chemical companies will continue to use TV for new product launches. But for existing chemical products I think we'll see more emphasis on doing a better job of isolating their key audience segments and concentrating their advertising on these. Many advertisers already do this, and now I think the chemicals will intensify their efforts in this direction."

Al Wegener, president of Saatchi & Saatchi Wegener, says the flap is nothing new: "Sure, if you show airplanes swooping down over a field, spraying indiscriminately in all directions, you're going to create a negative impression among non-farm viewers who may not realize that farm operators are responsible citizens who are actually staunch conservationists. They're conservationist to their core because their investment is in their land. They bend over backward not to mess it up. These are the facts, and this is the way we portray farmers in our commercials."

Photo provided by the John Volk Co.



"You could spray this product in your bathtub and it wouldn't even hurt little kids. Yet we probably will not use television."

TV's poison could be radio's meat; chemical reaction is less severe

How much farm radio can expect to benefit from the environmentalist-originated controversy over chemical advertising on TV remains a question.

John Beebe, national agri sales manager for WGN Radio Chicago and the Tribune Radio Networks notes, "TV did very well this spring. The chemical clutter we saw on television then, while radio remained relatively flat, may have had a good deal to do with the current anti-television backlash. So we feel very positive about farm radio's prospects for the future, and our business for fall is already pacing ahead of where it was at this time last year."

Beebe reports seeing "some very favorable signs that radio is likely to benefit from the negativism we're finding about chemical advertising on television. Several of the agencies we've called on are exploring alternative creative ideas to television, some for radio, some for print and some for collateral."

Radio vs. print. Adds Beebe, "We think radio stands a somewhat better chance than print to benefit from much of the TV fallout because radio is in the best position to tie in local promotions to farm programming and advertising on the local radio station. Most TV stations find this difficult because so few feature a farm director with programs specifically directed to growers and ranchers."

At Texas State Networks, gener-

al sales manager Richard Fennema reports farm advertising ahead of last year, calling it "one of the brightest spots in our network operation." He says most of the increase "is more spending by the usual chemical companies and the Federal Crop Insurance. The one major new piece of business was messages from The Beef Industry Council urging ranchers to vote in favor of the \$1 checkoff for each head of cattle sold, to build their kitty for their ad campaign promoting beef to the consumers. We got a little machinery business from Case, but machinery remains a small part of total ag dollars."

Lloyd Senn, former Torbet Radio ag director, who's taking over as director of Interep's agri-marketing operation when Lee Bullis retires this fall, says, "Advertisers will still need to use a media mix, whatever the environmental issues. If there is some pullback from TV, we have no way to know at this point whether the chief beneficiary will be farm radio, print, or collateral vehicles like promotion, public relations or direct mail."

"What we *do* know is that the logic of hardnosed business decision making favors radio. That's because radio is the most cost-efficient way to target specific crop and livestock geography, and most of the new chemical and animal health products introduced are one-crop or one-species specific. Close to 100% of their sales potential is in areas that can be mapped



John Beebe

by where the crop or animals they're intended for are raised. Radio can target each of these areas precisely."

Too much TV? Eastman Radio's farm director Ken Gioia believes that "In a lot of ways the chemical companies have been shooting themselves in the foot by spending so much in mass media like TV that reaches so many more nonfarm viewers than actual farm operators. We expect this to show up to radio's advantage starting in first quarter '89. We've already talked to agencies and advertisers who are talking about backing off from so much TV. It looks like both radio and print can expect to be the gainers."

Glenn Kummerow, vice president, director of agricultural services for the Katz Radio Group, reports, "The feedback we're getting from agencies is that there's likely to be some fallout from the controversy that may redirect some TV dollars into radio and print."

Kummerow adds that on top of TV's problem with the environmentalists, "Ever since Starch and Doane first made it possible in 1983 for ag advertisers to pinpoint where their ad dollars were being spent, there's been growing advertiser emphasis on narrower audience targeting. The farm agencies and farm media have had little choice but to respond to that."

He reports that now, as advertisers are planning their 1989 campaigns, "I'm hearing more inquiring about farm radio avails than I have for the past couple of years. Our first quarter started with delayed budgets and delayed start dates, but by the end of first quarter, and continuing on into second, activity picked up to the point that most of our farm stations finished first half ahead of the first six months last year. But business isn't what it used to be."



Glenn Kummerow

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Wegener says, "Television has proved dramatically effective for our clients. We feel we can continue to use it effectively so long as we remain sensitive to the problem and avoid using it in a way that might create misunderstanding among nonfarm viewers."

John Volk, president of The John Volk Co., calls the controversy "a true communications dilemma because television works so well. People may say 'waste circulation,' but the same can be said for the great majority of viewers for whom a Mercedes Benz is not an affordable option. Yet Mercedes continues to find TV efficient in reaching those relatively few among the millions who can afford it, just as agribusiness does."

Environmental pests

Volk adds, "The chemical marketers do recognize that a psychology of concern is out there, even though most of it is a matter of lack of knowledge. We have one client who's going to launch a new product next year in California, and TV would be an ideal buy. We can sew up his crop area with just two ADIs."

"There will be fewer chemicals advertising in primetime entertainment."

Ed Clement

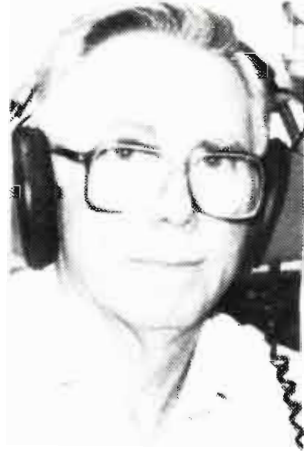


"The big 'but' is that there are more environmental activists in California than in any other state. Legislatively, California has traditionally been an avant garde state. California law states that a grower can use a pesticide *only* on the written recommendation of a licensed pest control applicator. No other state has anything even close.

"Result? You could spray this product in your bathtub and it wouldn't even hurt little kids. Yet

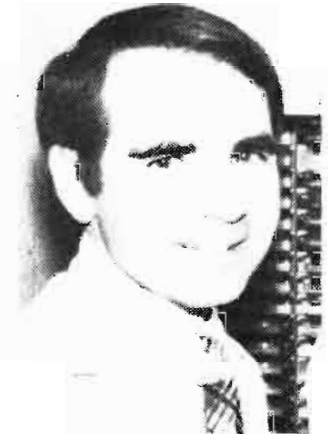
we probably will not use television. We don't want to put the farmers and our dealers in the position of having to face all the questions that are sure to come up."

At Valentine-Radford in Kansas City, vice president, group supervisor Graeme Blasdel has "seen the chemical companies increase their television investment significantly over the years, to the point that some companies' television and radio spending may now be out-



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Metropolitan Broadcasting Corporation



America's 'agformation' boom

As farming has become an increasingly high-tech industry, so has marketing communications to growers and ranchers.

Charles Might, sales/marketing director of the National Association of Farm Broadcasters, reports that satellite transmission technology has spurred the rise of new farm radio networks in Florida, Washington, Oregon, and Minnesota in the past two years, to add to the long list of farm information radio webs already serving the nation's producers of food and fiber.

Meanwhile, on February 9, Capitol Satellite and Communications Systems, a division of Capitol Broadcasting Co., transmitted and provided the satellite network for the first World Tobacco Video-conference, produced in conjunction with the Tobacco Radio Network and WRAL-TV Raleigh, N.C.

John Volk, president, The John Volk Co., Chicago, observes, "Because of the way growers and ranchers segment themselves by crop and livestock species, farm media have always been far ahead of consumer media in pioneering change."

He recalls that in print, "Farm magazines had regional editions long before the first consumer magazine tried them. Today, broadcasters carry on the tradition."

Now available, adds Volk, will be RFD-TV, "a 24-hour-a-day, seven-day-a-week farm program, sent out via [Spacenet I], that any farm operator with a receiving dish can pick up. [The Omaha-based network is] like CNN or an all-news radio station. Much of the information will be repeated, but it's constantly updated with the latest that's new."

weighing their print. And some of the same chemical companies who have been doing the complaining about television continue to use it."

In such circumstances, Blasdel's "guess" is that 1988 broadcast expenditures by the farm chemical companies "will be ahead of what

"Some advertisers will be switching from hard product sell to a softer . . . approach . . ."

John Volk



they spent last year. We need broadcast, and before anyone cuts back, I'd like to see some research on the subject rather than hear a lot of people say things based only on their immediate emotional reaction to the complaints."

Blasdel's own opinion is, "We need more TV programs directed specifically to the growers' interests. Step one should be research to find out what kind of program content growers really need. Growers have changed over the years. The successful ones are sophisticated businessmen, so it's quite possible more of them are looking for information that's more business-oriented."

Blasdel says his clients "already use what farm programming is available on television, but unfortunately there's not enough. That's why I'd like to see the research, then see more programming coming out of the findings that we could associate our clients with."

He adds, "The research already done tells us the growers' viewing habits aren't much different from that of the urbanites. That may be because there's so little TV programming specifically directed to growers and ranchers."

Fletcher/Mayo's Clement

agrees: "The way farm operators watch television is a lot closer to the way the general market watches than a lot of people realize. They watch the evening news for those weather and market reports. It's too cost efficient for the chemical companies to pass up."

On the other hand, Clement thinks "There will be fewer chemicals advertising in primetime entertainment, and I think the first one into a particular newscast will insist on being the only chemical company in its own 15-minute segment. I think most will go out of their way to avoid the situation we've had of seeing two, three—even four chemical companies squeezed into the same 15-minute news segment. It will be more 'first come, first served,' and the second and third chemicals will have to go somewhere else."

Volk believes the uproar "affects the message as much or more than it does the choice of media. Some advertisers will be switching from hard product sell to a softer corporate approach, working to build the image of both their company and of farming. Ciba-Geigy has used television advertising to talk about the benefits of farming to the nation."

Charles Might, executive sales/marketing director of the National Association of Farm Broadcasters,

"We need broadcast, and before anyone cuts back, I'd like to see some research . . ."

Graeme Blasdel





Charles Might

Member NAFB stations carry programs that screen out people who aren't involved in farming.

believes the controversy "could cause some chemical companies to think twice before spending more dollars in primetime television. On the other hand, 39 NAFB member television stations do carry daytime ag shows that, by the very nature of their content, screen out most people who aren't farmers or members of farm families."

Kent Francis, director, agri-marketing for Petry Television, reports that the Morning Ag Report is currently seen on 43 TV stations, up from about 30 stations last year, and that stations in eight to 10 more key farm markets are considering adding the syndicated show. Francis says it's aired "early in the morning when farmers are up but has little visibility among nonfarm viewers. That makes it more desirable to advertisers selling specific chemicals for specific crops. Because of its early hour, it can reach 50% of the national ag population without being seen by too many viewers outside of agriculture."

He adds that the format today is focused more on marketing and says it's the kind of program "I think more stations will want to carry to better serve their ag viewers with advertising directed specifically to those viewers without risking problems with all the non-farm people. At the early hour *Morning Ag Report* runs, TV pricing is lower than the premium many radio stations charge for their early morning drivetime. For that lower price an advertiser can get comparable ag audiences and farm directors comparable to radio's, plus the impact of televi-

sion."

Meanwhile at least some television stations have run up against another kind of problem with farm-directed programming. Says Jim Donovan, director of sales and operations for WMBD-TV Peoria, Ill., "many large agencies handling ag accounts will no longer give consideration to the value of farm-ori-

ented programming as a vehicle to reach their target customers—farmers." As an example, Donovan cites noon newscasts specifically targeted to farm operators "that have to meet the agencies' cost per point goals on men demos in Arbitron and Nielsen, even though such surveys as Doane show the noon news as the No. 1 newscast in the market for reaching farm households. This is a disturbing trend that has developed over the last few years and would seem to be a disservice to the ag accounts."

Fewer companies spend more

Meanwhile, though recent mergers have cut down the number of chemical companies, Volk says that those companies among this smaller universe that are advertising "are spending more because they're racing to introduce improved new products. So though their market has not grown, the level of promotion this year is up considerably." □

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National Association of Farm Broadcasters

*From Rockwood Research

Viewpoints

Thomas F. Leahy



President, CBS Marketing Division, in a speech before the Rochester, N.Y. Advertising Council 39th annual dinner.

CBS poised to fight back; taking on cable, syndie, promotional spending

Television as a category held its own in 1987, doubling to \$17.8 billion and increasing its share of the total advertising dollars from 27% to 29%. However, within that 29%, the percentage of network dollars dropped eight percentage points (from 59% to 51%) and this shortfall essentially enhanced the fortunes of our brethren in the cable industry. The cable advertising dollar grew from \$5 million to \$1.2 billion. These conditions have forced us to zero-base our marketing objectives as the new competitive reality has become painfully clear. Audience habits have gone from habitual viewing to what we refer to as grazing. From limited choices to a wide range of choice. From an annual increase in both total hours of viewing and, appreciation for that viewing, to little or no growth in viewing time, and more and more dissatisfaction with what has been viewed. Clearly, our business has a disease—it's not cancer, it is simply suffering from maturity.

Three ways out

Basically, there are only two ways out of this situation. A third being least attractive is extinction. But as I said there are two others.

We can still expect some additional growth even in our mature condition. This is referred to as growth maturity as witnessed this year when our national home base grew from 88.6 to 90.6 million homes. That is not to be dismissed but obviously of little comfort. The most secure and intelligent solution that we support is the process of what is called innovative maturity.

We are not as powerful as we once were; that's the truth, and so be it. However, we still are the most powerful marketing tool available to the national marketer and as such *indispensable*.

Our problem—we have allowed our strength and effectiveness to be evaluated as a simple commodity

and for years enjoyed the increased revenue that resulted from the competitive auction that ensued in the purchase of our air time. Not a mortal sin for an industry that has a fiduciary responsibility to its stockholders, our sin was much more simplistic. It was one of omission, not one of commission. We just plain forgot to discuss our value. Initially that value was taken for granted, and as strange as it might seem at one point, it was almost insulting for us to discuss this value with our client. The fact that television worked was blatantly obvious. They knew it. We knew it. The world knew it.

Camelot diminished

Now it was simply a matter of negotiating at what price. Well, price became the coin of the realm. And as prices increased, it certainly served our client's purpose to support alternate media as a method to enhance their leverage in our price discussion. As a result, the advertising community was more than cooperative and sympathetic to the sales story of cable and barter syndication when they arrived to sell their wares. Both industries, now representing almost \$2 billion, that essentially would have been allocated for network television, have been institutionalized and we will now have to acknowledge their existence and fight them on the basis of our effectiveness, that "added value," that is intrinsic to network television alone.

While all this was happening in the myopic, one could say, world of buying and selling television, the fragmentation that was taking place as a result of this process did diminish the advertising impact that was previously associated with a television commercial in the days of "Camelot." With more messages fighting for the customer's attention and more distribution forces increases the outlets available for those messages, the consumer-product industry found themselves forced to lean more heavily on promotion to achieve their required quarterly results. Voila! The growth of promotion.

Enter CBS Marketing

So you see, both situations occurred almost simultaneously, and we in the network television business are now forced to deal with them simultaneously. So CBS created a new standalone division, CBS Marketing, with the mission of positioning network television as both an advertising and a promotional medium to the nation's marketers. The goal is to expand the focus of the CBS Network Sales and Marketing mindset, if we were to use 1987 as an example year, in addition to the \$9 billion already allocated for network television, we must also take a bite out of the \$11 billion earmarked for national advertising as well as recovering some of the \$100 billion that has found its way into promotion. To put it bluntly, we are declaring war. Network television still represents the strongest marketing tool know to mankind and it is our objective to make sure that the strength is fully understood and appreciated by our advertisers. We have to serve them better. We have to make their dollar work harder. The goal is not only admirable, it is achievable.

Aug. 4, behind *Cheers* and leading into a one-hour *Night Court* rerun.

As several ad agency execs point out, commitments do not always guarantee telecast. Saatchi & Saatchi notes that eight of the 14 commitments of spring 1987 made the nets' fall rosters. Others aired in the midseason or spring season—or in the case of CBS' *Sid Caesar Show* and an untitled NBC drama from *Magnum's* Don Bellisario Productions, have yet to appear. CBS' *The Cavanaughs* in recent days was given an Aug. 8 return date, with originals.

NBC's *Empty Nest*, a commitment that dates back to 1986, now is due this fall. The show's concept however, has changed. Instead of being about a middle-aged couple, played by Rita Moreno and Paul Dooley, whose children have grown and left the nest, the sitcom now

stars Richard Mulligan as a widower.—**Jim Forkan**



A possible spinoff from NBC's "227" would star the show's Jackee, industry sources report.

'Night Court' sold in 124 markets

Night Court has been sold in 124 markets for next fall, including all of the top 25 and 47 of the top 50 markets, according to William Hart, vice president and domestic sales manager at Warner Bros. Television Distribution.

The most recent stations signing for *Night Court* are WJZY-TV Charlotte, WHIO-TV Peoria-Bloomington, KMEG-TV Sioux City, KAUZ-TV Wichita Falls-Lawton and WOGX-TV Gainesville.

Night Court has been nominated for 13 Emmy awards, including outstanding comedy series. It stars Harry Anderson and John Larroquette, who has won an Emmy three years in a row for best supporting actor.

Update on status of first-run syndicated shows since NATPE

The clock on first-run syndicated shows keeps winding down. And the latest count shows that there are 53 programs in the "go" position for the fall (cartoons include fall, 1989), while 14 remain in the question-mark category. Since the last TV/RADIO AGE report, May 2, about 15 have been dropped or

put on hold for another season.

The number of announced "go's" still remains comparatively high, but much of this is because syndicators are releasing the start button despite clearance levels less than the mandatory 65-70%. Newly introduced programs since the last update include Group W's

Teenage Mutant Ninja Turtles and Cluster Television's *Muppet Babies*.

Updates on "active" programs will continue in subsequent issues until "post time." First number on list under terms reflects the national time for sale the second, local. Each + equals 30-second unit.

First-run half-hour strips (fall 1988)

Program	Distributor	Terms	Stations	Top 10	% of U.S.	Go/No Go
Body by Jake	Samuel Goldwyn	B(3/4)	65	9	70	Go
Family Feud	LBS	C++	101	9	75	Go
Family Medical Center	Lorimar	C++	90	10	70	Go
Gong Show	Barris Program Sales	C++	107	10	76	Go
Group I Medical	MGM/UA	C+	87	10	77	Go
Improv Tonight	Peregrine	B(2+/4)	70	8	60	Go
It's a Living	Lorimar	C	141	8	80	Go
Leave It To Beaver (new)	Hal Roach	C	41	6	45	?
Liars Club	Four Star	B	81	5	63	Go
Mama's Family*	Lorimar	C	159	8	84	Go
On Trial	Republic	C++	78	10	73	Go
Puttin' on Hits	MCA	C	N.A.	N.A.	N.A.	?
Puzzle Pix	M&M Synd.	C	22	0	18	?
Relatively Speaking	Select Media	C++	75	9	64	Go
Small Wonder*	20th Fox	C	94	10	76	Go
Sweethearts	Multimedia	C++	85	8	80	Go
Triple Threat	TeleTrib	B	90	10	77	Go
USA Today	GTG	C++	146	9	89	Go
Wipeout	Paramount	C++	70	8	60	Go

* = fall 1989

(Continued on page 75)

First-run hour strips (fall '88)

Program	Distributor	Terms	Stations	Top 10	% of U.S.	Go/No Go
Liddy	All American	C	65	8	67	?
Live with Regis & Kathie Lee	Buena Vista	C++	120	7	75	Go

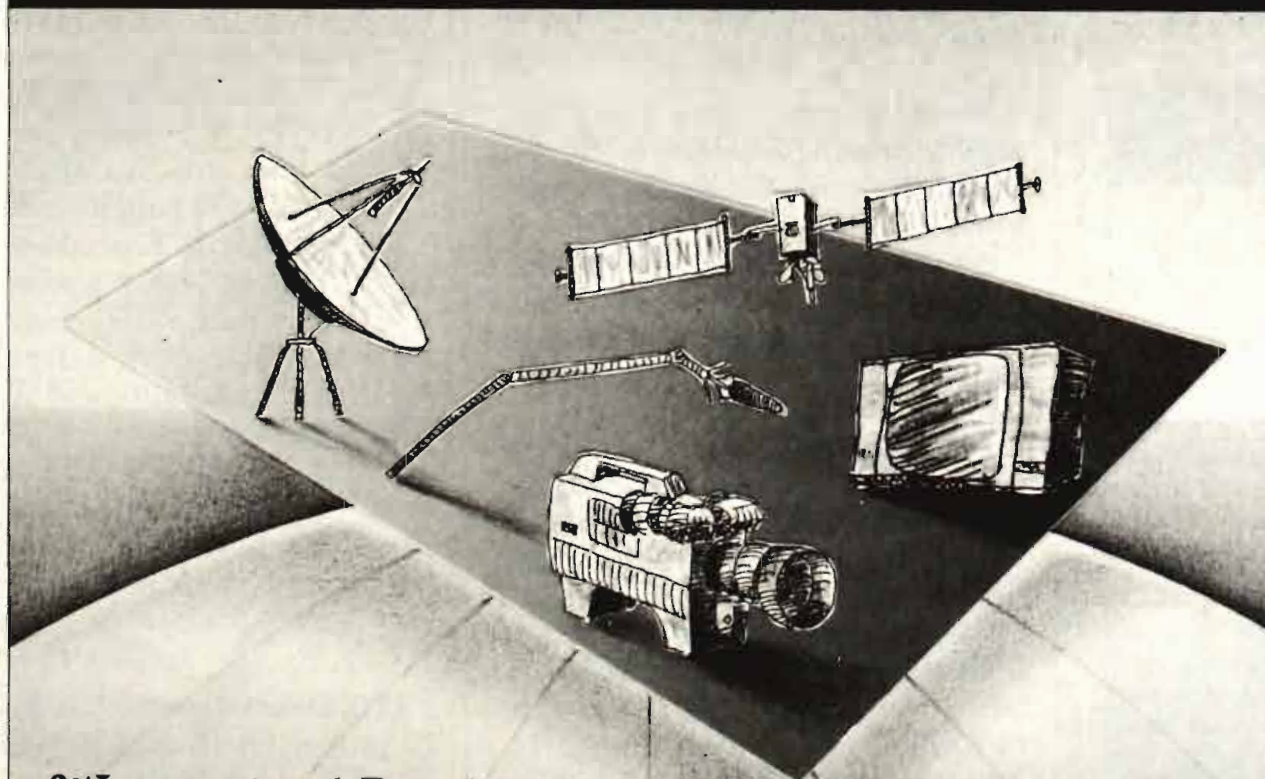
First-run half-hour weekly (fall '88)

Program	Distributor	Terms	Stations	Top 10	% of U.S.	Go/No Go
Candid Camera	Blair	B(3/3.5)	N.A.	N.A.	20	?
Crimes of the Century	Casablanca IV	B(3/4)	N.A.	8	60	Go
Golden Greats	TeleTrib	B(3+/3+)	80	8	74	Go
Great Escape	Genesis	B(3/3.5)	65	6	54	Go
Learning the Ropes	Action Media	B(3/3+)	72	7	78	Go
Life's Embarrassing Moments	Group W	B(2.5/4)	93	8	81	Go
Monsters	TeleTrib	B(3/3+)	105	10	82	Go
Mr. Belvedere*	20th Fox	C	57	9	58	Go
Munsters Today	MCA	B(3/4)	N.A.	10	84	Go
My Secret Identity	MCA	C+++	N.A.	10	78	Go
New Generation	Fries	B(3/3.5)	36	6	25	?
Secret World	Turner	C	N.A.	N.A.	N.A.	?
Starting From Scratch	Worldvision	B(3/3+)	90	10	90	Go
Tiko, Pride of Rockies	ITC	B(3/3+)	25	4	35	?
Twilight Zone	MGM/UA	B(3+/3+)	135	10	86	Go
World Class Women	Select Media	B(2+/4)	67	7	58	Go
World of Guinness Records**	Peregrine	B(2+/4)	90	10	72	Go

* = fall 1989. ** = new episodes. *** = available May 30.

(Continued on page 78)

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Syndication shorts

Palladium/New Century Television has sold its Power Pack feature film package to 41 stations, including WTAF-TV Philadelphia, KTVT-TV Dallas-Ft. Worth, KGMC-TV Oklahoma City, WXXA-TV Albany, WAWS-TV Jacksonville and KING-TV Seattle. Titles include *Straight Time*, *Hercules in New York*, *Cease Fire*, *The Grey Fox*, *Strangers Kiss*. and *Agatha*.

Orbis Communications' *Public People/Private Lives* has been cleared in 72% of the U.S. markets. Among stations licensed in the top 20 markets are WNBC-TV New York, KABC-TV Los Angeles, WPWR-TV Chicago, KRON-TV San Francisco, WCVB-TV Boston, KDFI-TV Dallas, WJLA-TV Washington and KHOU-TV Boston.

Newest stations to sign for *ALF*, distributed by **Lorimar Television**, are KNXV-TV Phoenix, WBNS-TV Columbus and KSTU-TV Salt Lake City. In addition, CHCH-TV, Canadian station in Hamilton, has secured the English-language national rights to air the comedy series throughout English Canada as a strip for the fall, 1990.

World Events' *Saber Rider and the Star Sheriffs* debuts on Superchannel in the U.K. in the fall. Also, *Rider* has been bought by TV-3 in New Zealand. WE's *Voltron* has been cleared in more than 60 international markets to date, including TV-3.

Mint Edition, 25-title film package released by **Lorimar Television**, has added WBZ-TV Boston and WUAB-TV Cleveland, bringing the total number of clearances to 61. Other stations signed include WWOR-TV New York, KPIX-TV San Francisco, KTVT-TV Dallas and KSTP-TV Minneapolis. Among the titles are *The Boy Who Could Fly*, *Power* and *The Morning After*.

Four Star International has added six stations to its *The New Liar's Club* lineup. These are WXON-TV Detroit, KDFI-TV

Dallas-Ft. Worth, KFTY-TV Washington, WVEU-TV Atlanta, KPHO-TV Phoenix and WPLG-TV Miami, bringing the total to more than 50% coverage of the U.S.

M&M Productions has started preproduction on a half-hour strip series *The Search for Missing Children*. The program will cover in detail one child each week and the age covered will range from toddlers to teenagers. Distribution will also be handled by M&M, and the program is available for the fall. Ten-second promos will be produced by M&M, which is located in Voorhees, N.J.

MCA TV Enterprises' *The Morton Downey Jr. Show* has cleared seven additional stations, including two network affiliates, the ABC affiliate in San Diego and the NBC carrier in Green Bay. The indies signed are in Dallas, Seattle, Milwaukee, Providence and Columbia, S.C.

Coral Pictures has added 18 sales to its feature film packages, series and TV specials. Coral Collection I, 16 theatricals, has been acquired by WPMI-TV Mobile; Coral Martial Arts I, 15 action films, was sold to WBNX-TV Cleveland and WPMI-TV Mobile; *Man and His World*, cartoon series, was picked up WNHT-TV Schenectady; *Hollywood and the Stars*, two-hour TV special, was bought by KPBS-TV San Diego; *10 From Your Show of Shows*, two-hour special, was signed by KPBS-TV San Diego, KCPM-TV Chico-Redding, WHRO-TV Norfolk and WCFE-TV Plattsburgh, N.Y. Also, KPBS-TV and KNME-TV Albuquerque acquired the 90-minute special *Tony Bennett With Love*; and KPBS and KNME both licensed *Hey Abbott*, 90-minute TV special.

ITC Entertainment has acquired 10 properties from ABC Distribution Co., in a multimillion dollar agreement. Films include *The Flamingo Kid*, *Young Doctors in Love* plus made-for-TV movies *Jacqueline Bouvier Kennedy*, *Marciano*, *Hot Rod* and *A Time for Miracles*. Also, in the acquisition is *Secrets and Mysteries*, 26 half-hours star-

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ring Edward Mulhare as host.

All American Television has added KHJ-TV Los Angeles and WFXT-TV Boston to its *Liddy* lineup, to debut in the fall. Other recent licensees include WGGT-TV Greensboro, WFAT-TV Johnstown-Altoona, WTGS-TV Savannah and WVGA-TV Albany, Ga.

Claster Television will syndicate *Muppet Babies*, Jim Henson Productions' CBS Saturday morning series, for fall 1989. Claster anticipates talking to potential customers beginning in July. The show has been outdistancing other morning fare such as *Smurfs*, *ALF* and *the Real Ghostbusters*, in shares of kids 2-11 and 6-11, says Claster.

Group W Productions has cleared *Teenage Mutant Ninja Turtles*, weekly series set for September, in 102 markets, including all of the top 10 markets and 36 of the top 40. The lineup is headed by WPIX(TV) New York, WNBC-TV Los Angeles, WPWR-TV Chicago, WGBS-TV Philadelphia, KBHK-TV San Francisco and WLVI-TV Boston.

Harmony Gold's two-hour special, *The Secret Identity of Jack the Ripper*, has cleared in more than 100 markets. Clearances include the seven Fox stations and WTAF-TV Philadelphia, KBHK-TV San Francisco and WXYZ-TV Detroit. The program airs Oct. 28.

Zooming in on people

Jonathan Dolgen has been named president of Fox Inc., and Chase Carey, executive vice president, in a restructuring of the company, the operational arms of Twentieth Century Fox Film Corp., Fox Broadcasting and Fox TV Stations. In addition to his new position, Dolgen will continue as president of the TV division with Twentieth Fox. Before joining the company, he held various positions at Columbia Pictures.

Carey joined Fox in December 1987 as senior vice president of 20th Fox.

Philip R. Farnsworth has been elected secretary of Capital Cities/ABC Inc. He joined American Broadcasting Companies in 1977 as

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Childrens—live action (fall '88)

Program	Distributor	Terms	Stations	Top 10	% of U.S.	Go/No Go
Dr. Fad	Fox/Lorber	B(2/4)	62	9	65	Go
Finders, Keepers	Viacom	B(5/1.5)	98	10	80	Go
Footlight Follies	Peregrine	B(2+/4)	N.A.	N.A.	N.A.	?
Fun House	Lorimar	B(2+/4)	82	9	77	Go
Slime Time/Treasure Hall	Access Synd.	B(2/4)	71	10	75	Go
Superboy	Viacom	B(3/3+)	109	10	82	Go

First-run hour weekly (fall '88)

Program	Distributor	Terms	Stations	Top 10	% of U.S.	Go/No Go
Fairie Tale Theatre	Silverbach/Lazarus	C	35	7	40	Go
Freddy's Nightmares	Lorimar	B(6/6)	100	8	68	Go
Latin Connection	All American	B(5/7)	40	6	40	?
Portrait of Soviet Union	Turner	B(5/6½)	87	8	60	Go
Public People, Private Lives	Orbis	B(5/7)	105	8	75	Go
USA Weekend	GTG	B(5/7)	127	9	85	Go
War of the Worlds	Paramount	B(5+/6+)	140	10	89	Go

First-run cartoons (fall '88 & '89)

Program	Distributor	Terms	Stations	Top 10	% of U.S.	Go/No Go
Alvin & the Chipmunks	Lorimar	B(2+/3+)	112	10	84	Go
Animated Classics	Taffner	B(6/6)	47	6	47	?
Bugsburg*	Group W	B(2+/3+)	53	6	52	?
Care Bears	SFM	B(2.5/4.5)	86	9	71	Go
Chip-N-Dale*	Buena Vista	B	115	9	85	Go
Cops	Claster	B(2/4)	109	10	90	Go
Denver the Last Dinosaur	World Events	B(2+/3+)	115	9	80	Go
Gumby	Lorimar	B(2/4)	82	10	70	Go
Marvel Universe	New World	B(2/4+)	N.A.	N.A.	N.A.	?
Muppet Babies*	Claster	B(N.A.)	N.A.	N.A.	N.A.	?
Police Academy*	LBS/Warner Bros.	B(2+/3+)	48	7	52	Go
Snorks	Worldvision	B(2+/4)	75	10	70	Go
Teddy Ruxpin	LBS	C	76	10	73	Go
Teenage Mutant	Group W	B(2+/3+)	102	10	86	Go
Vytor*	World Events	B(2+/3+)	N.A.	N.A.	N.A.	?
Yogi Bear	Worldvision	B(2/4)	80	10	80	Go

* = fall 1989.

assistant secretary land continued in that capacity for Cap Cities/ABC subsequent to the merger of the two companies. Before joining ABC, Farnsworth was a branch chief in corporation finance at the SEC.

Nancy A. Cook has been named associate sales manager, Multimedia Entertainment. She joins ME after seven years with the NBC Radio Networks. Most recently, Cook was director of affiliate relations at The Source Radio Network.

Alan Cohen has been appointed director of publicity at Worldvision Enterprises. Prior to joining WE,

Cohen was senior account executive at Stone/Hallinan Public Relations, and before that, publicist at WNET-TV New York.

Steven R. Koltai has been named vice president, strategic planning at Warner Bros. Inc., a new position. He joins WB from McKinsey and Co., consulting firm. Earlier, he was president of the first private TV satellite company in Europe, Coronet, based in Luxembourg.

Christopher Rovtar has been promoted to central region manager for first-run programming at MCA TV Enterprises. Rovtar has been sales executive. He joined the

company's New York office in 1986 as a sales rep covering the midwest territory and was transferred to the division's headquarters in Los Angeles the following year.

Charles "Butch" Fries has been promoted to senior vice executive president, administration, at Fries Entertainment. In his new position, he will be the chief administrative officer of the company.

John Starr has been promoted to director of operations, HRI Group, formerly Hal Roach Studios. He has been manager, sales servicing department. Before that, Starr worked in production.

**JUICED-UP
INDIE**

Ex-ABC exec
makes 'em watch
WACH-TV in S.C./81

**BUYER'S
OPINION**

Radio promotions
that benefit both
listeners, clients/83


**SPOTLIGHT
ON...**

Carolyn Wean
stresses news, local
at KPIX S.F./85

TELEVISION/RADIO AGE

Station Report

July 11, 1988



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Ex-ABC sales exec hits paydirt watching WACH-TV Columbia, S.C.; promo blitz boosts juiced-up indie

Leave it to an old pro like Walter Flynn, former head of sales for ABC's owned TV stations, to launch a new station with all stops out and all systems go. That goes for programming, facilities, staff, advertising and promotion. "It's a market waiting for us to happen," says a modest Flynn. "We're filling a need."

Explains Flynn: "Columbia, South Carolina, had only three affiliates, period. To judge from the response to our kickoff and our reception by the local radio stations and press and public, this market must have wanted an independent for a long time."

He reports the market's No. One radio talk and call-in show interviewed him for an hour during morning drive and his new station, WACH-TV—"We pronounce it WAtCH"—got the front page of the local *TV Weekly Guide*, "and you can't buy that. Plus we got a four-page spread on the inside."

WACH-TV is former religious station WCCT-TV, Channel 57. Flynn and his partners took it from 707 Kw to five-million watts and added stereo in a four-station market in which only one competitor

Flynn invited the viewers to help program the station.

can boast a VHF signal.

The power boost, says Flynn, "extended our signal to give us five times our former coverage area. And that's just one of the things we sell" while waiting for the first book, the July report, which should be out in August.

Another thing WACH sells is its Fox affiliation, "which gave us the right to strip all the back episodes of *Married With Children* and *21 Jump Street* five nights a week"—*Married* starting at 6 p.m. and *21 Jump* at 7 p.m.

WACH also ran a full-page newspaper ad listing 75 programs, not counting movies, the station was

"It's a market waiting for us to happen."

able to buy "inviting readers to choose from among the 75 to help us program our new station. The response was overwhelming."

Flynn concedes his response got an extra shot in the arm from WACH's four-day radio schedule telling listeners to watch for the ad. After that the station ran 300 rating points a week on radio, continuing to talk up watching WACH. And it has five billboards going up with "Watch WACH" all over them. So other things Flynn's sales team pitches are the station's media schedule, the response it's gotten and WACH's audience promotions.

Promo pitches. One is the "Find the missing T" (in WAtCH) promotion. For this one Flynn goes on the air, explains that WACH is pronounced "WAtCH," and introduces the announcer who "is going to tell you where to hunt for the missing T and what to do when you find it."

WACH's second game is a cross-promotion with a radio station that asks listeners to answer a question about the following night's episode of *21 Jump Street*, which acts as a fast audience builder for the show.

Finally, Flynn says there's one more thing WACH sells to its ad prospects: "The professionalism and experience of our manage-



Walter Flynn

ment."

As operating general partner, ABC veteran Flynn himself has 25 years in broadcasting. Station manager Murray Michaels comes from 12 years at ABC, where he was programming, news and research troubleshooter, making his rounds of the affiliates.

John Livoti, WACH's general sales manager brings 20 years of broadcast sales and sales management to the station, 12 of those years in WACH's own Columbia market. National sales manager Joe Mahan is also a 20-year broadcast veteran with sales management experience right there in Columbia at ABC affiliate WOLO-TV. And the traffic manager is Jack Colegrove, who moves in from WIS-TV, also Columbia. WACH's rep is Seltel, one of the more successful reps in attracting new station clients in the past two years.

Columbia is the 87th ranked ADI, and Flynn reports it "about 75th in adults 18-49." He says last year the market attracted TV revenue of approximately \$30 million net, not counting network compensation.—**George Swisshelm**

WWOR-TV expands 'People'

WWOR-TV, the MCA-owned station in New York, is trying a summer experiment by expanding its morning talk/interview program *People Are Talking* into two hours.

The four-week special running through July has host Renee Hambley holding down the first hour from 10-11 with her own brand of local gossip and discussions with guests and the studio audience.

Co-host Richard Bey continues the show at 11 with more in-depth interviews and audience participation on the controversial issues of the day.

WWOR has been working to expand its presence in the live and local morning talk show arena.

KING-TV unleashes 16-screen pitch to promote Olympic sponsorships

To attract sponsors for its presentation of the 1988 Seoul Summer Olympics starting in mid-September, NBC's Seattle affiliate KING-TV enlisted its commercials producer Don Wells and a local audiovisual production firm, Watts Silverstein, to create a 10-minute, 16-screen video presentation narrated by NBC sportscaster Charlie Jones.

Clients and prospective advertisers were invited to KING for one of eight daily showings plus catered refreshments. A KING account ex-

KING anticipates heavy political ads to mix in with Olympics.

ecutive welcomed the guests with a brief opening statement and distributed sponsorship packets with rate information. The presentation itself combined Olympics footage with man-on-the-street interviews with Seattleites telling why they want to watch the games.

General sales manager Bob Glover says a single local spot in the opening and closing ceremonies, in primetime, will run between \$15,000 and \$20,000 and that "Packages come in all shapes and

sizes. We're nothing if not flexible."

Glover reports some advertisers in the Olympics only, and others are in all-sports packages, combining, for instance, spots in both the Olympics and Seahawks football. Some are in the Olympics, plus pre- and post-Olympics inventory. One retailer, Glover says, will be in the Olympics and in *Today* for three weeks following the summer games. And pricing "is all over the board."

Glover also reports that more than half of the Olympic events will be fed live from Seoul during primetime. While the East Coast live feed will start at 7:30 p.m. and end at 2:30 a.m., the feed to the west coast and Seattle is scheduled to start at 4:30 in the afternoon and run through until 11:30 p.m.

He anticipates heavy political advertising in the Olympics starting in early September. "We have a state primary coming up September 20. Besides the national presidential contest, we're having gubernatorial and senatorial races this year as well as contests for Congress and some local elections."

He adds that, though most of the 27 sponsorship packages sold so far have been bought by previous TV advertisers coming back for more, "negotiations are in the works with several first-time advertisers."



KING-TV sales exec Barbara Frank welcomes a group of potential clients to the station's Olympics presentation.

'The right time' for WUAB's new 10 p.m. newscast

For WUAB-TV Cleveland, July 4th was not only Independence Day but the six-month anniversary of its successful *Ten O'Clock News*.

That weeknight newscast, the sole 10 p.m. local news show in northeast Ohio, has been setting off fireworks in ratings and sales. Indeed, execs at the Gaylord Broadcasting Co. outlet believe this could well be the most successful startup news at an indie.

It was developed for financial reasons. As Mike Schuch, WUAB's



Anchoring WUAB-TV's "Ten O'Clock News" are Bob Hetherington and Romona Robinson. Standing are, l. to r., Gib Shanley, sports director, and Frank Cariello, meteorologist.

vice president and general manager, noted, "30% to 40% of TV revenues in this market come from news. If you don't have news, you don't get that. We rolled this product off the assembly line [in January] to compete" for ad dollars WUAB previously had no chance at getting.

Looking forward to the July sweeps, Schuch hopes that, with the networks' heavy repeat schedules, "we may get up into the 15 share range."

The Gaylord station has been calling viewer attention to its news success with on-air promos, print, outdoor billboards as well as "extensive radio." Schuch boasted that WUAB ranks among the top three radio advertisers in Cleveland.

The theme line for the *Ten O'Clock News*' promotion is "The right news at the right time."

WPIX-FM in for some big changes under Tribune

WPIX-FM, which has been slipping along in New York, is undergoing a shakeup under the direction of Wayne Vriesman, the new vice president in charge of Tribune Broadcasting's radio group.

In the first step of a reorganization, Vriesman has brought in Raymond A. Gardella as the station's new general manager, replacing Marvin Seller.

"We have to bring the station up to a respectable level," said Vriesman, referring to the outlet's anemic 1.3 Arbitron rating in last winter's book. Among all stations in the market, WPIX ranks in the mid-20s, but more importantly it trails WNSR with its mixture of soft rock and oldies, and WLTW, the light/easy-listening station.

WPIX bills itself as the only pure adult contemporary station in the

"We have to bring the station up to a reasonable level."

market, but it hasn't been able to take that to the bank.

Gardella has been general manager of WICC-AM Bridgeport, Conn., another Tribune station. No word yet on who succeeds Gardella, and Vriesman said he's got a search firm looking.

Fixing things. Since taking over the Tribune radio group job last October, Vriesman has been devoting most of his time to fixing WPIX. In order to get a better handle on any new format changes—and there likely will be some major changes—Vriesman has organized his research around phone surveys, focus groups and now auditorium testing.

Vriesman hopes to have the station's "new formatted direction specifically defined" by the fall. After that, he'll leave Gardella pretty much alone to do the job.

Next mission? Probably station acquisitions, said Vriesman. While there's no timetable, "we've been out there kicking tires."

One Buyer's Opinion



Radio promotions must benefit listeners and meet client's goals

Boyer

Local promotion is what makes radio special. But if you're the client, how can you maximize the effectiveness of your radio promotion?

First, the request should initially come from your buyer to the station account executive, because, based on the ongoing relationship between the a.e., the buyer and client, the a.e., as "an acting member" of the client's marketing team with a good understanding of the client's marketing mission, should be the best person to inform the station's promotions director how a promotion can best enhance the client's advertising. The a.e.'s knowledge of the client's dollar commitment also helps the promotions director know what level of promotions the client should expect.

Then, after the promotions director, a.e., station sales management and program director internally agree on the kind of promotion they can offer, the promotions director can contact the client's marketing representative to discuss specific ideas. The client's rep should:

- Know the promotion's objective: Is it to boost awareness of an existing campaign? Increase store traffic? Enhance product image? Push product demand at retail?

(NOT "Gotta have a promotion to get on the buy." That is not an objective. It's blackmail.)

- Be realistic. Know the level of promotion to expect, based on the buy's dollar value and the station's market. Don't expect a four-week promotion in New York for a one-time \$2,500 buy.

- Be prepared to offer promotional ideas of your own. You know your needs better than a station promotions director who spends probably only one-quarter of his/her time on sales promotion and that one-quarter is split among all the station's clients.

- **Know what the client can supply:** perhaps prizes, such as tickets or product samples, point-of-purchase dollars, tags on other advertising, or an existing and valuable relationship (a soft drink client, for instance, who can involve a grocery store or fast-food chain in the promotion).

- Understand that the promotion must be consistent with the station's format. The station must derive a listener benefit from the promotion.

- Give as much advance notice—lead time—as possible.

Assuming the above "givens," then it's up to both the client rep and station promotions director to coordinate the promotion dates with the client's sales team. And they should make sure all sides have a written understanding of exactly what each is to give and receive from the other.

After all, there should be objectives. Please don't ask for a promotion without a purpose. And involve client marketing people with the authority to make decisions. Too often, promotions are left to the media buyer whose job is to buy time—not to create and manage promotions. You don't hire an electrician to fix your plumbing. Promotions are not the buyer's area of expertise, nor are they something the buyer is usually compensated for. Buyers just don't need this hassle on top of all the responsibilities they already have.—**Madeleine Boyer**, manager, advertising and promotion, WYNY(FM) New York, adapted from her presentation before the 21st Annual Radio Workshop sponsored by the Association of National Advertisers and the Radio Advertising Bureau

KNIX offers double-barreled media approach to its country music fans

Phoenix is still growing and so is the ad revenue for country music combo KNIX AM-FM, says general sales manager Bob Podolsky.

He reports automotive, "both new car and auto-aftermarket, incredible this year. Entertainment advertising is up, with more country concerts coming to town at the rate of about two a week. The fast foods and supermarkets continue to invest in radio here. The only categories flat right now are home building and the banks."

But KNIX wanted more. The station added value in the form of "double exposure," offering advertisers the chance to put their message across in print as well as on radio.

The print is *KNIX Tune-In Magazine*. Podolsky says 55,000 copies are distributed free each month through some 400 Circle K convenience stores throughout the market. "We cross-promote it on the air, tell listeners it's at their



KNIX's Bob Podolsky showing his "Tune-In Magazine" promo pitch.

nearest Circle K, and they have to go in and ask for it. That makes it a store traffic builder for Circle K and it gets high visibility for country music, for country music artists and for our KNIX call letters."

He says advertisers can buy ads in the magazine alone or packaged with their radio schedules. The sta-

tion's radio account execs sell the ads on both KNIX Radio and in the magazine, where space rates run from \$500 to \$3,000, depending on size and placement of the print ad.

Read a radio. Podolsky describes *KNIX Tune-In Magazine* as "A chance for our listeners to read their radio station," because the editorial content is so closely allied with the station's format and the country artists it features.

He says much of the content covers the big names that are famous all over the country but that 30% of the editorial "is about our home-grown local country talent. The readers really go for that because they know most of them. They're like neighbors."

The first issue of the magazine came out last October, and Podolsky says his people "did a year's worth of R&D before we launched it. And we recently did another survey asking people what they like and don't like about *Tune-In*. We got 500 answers back to our mailed questionnaires, so we keep learning as we go along."

Tune-In has its own circulation director who hires a service that monitors the magazine racks in the Circle K outlets. That tells him which store locations pull best, which racks have to be refilled most often.

The radio station publishes a country music magazine, distributed free through Circle K.

Podolsky says *Tune-In* reached break even in May and adds, "We're going to grow. Our radio station is successful because of 21 years of consistency and opportunities to fine-tune our country sound. The Country Music Association voted KNIX the 1987 Station of the Year.

Good idea. "Some of our advertisers have gotten a good idea of the value of our readership from coupon offers they've run and the returns they got back," says Podolsky. "We already have a number of

WWMT flashy promo push

WWMT(TV) Kalamazoo, Mich., has a new promotion campaign themed "We're West Michigan Television," whose on-air logo design also is being incorporated into its fall sales efforts.

The 10-second IDs leading into or out of program promo spots air once an hour.

In search of a new promo look, the Busse Broadcasting Corp.-owned CBS affiliate had five production companies bid on the design project. Guy Taflinger, WWMT art director, chose the effects animation design group of

Editel/Chicago. All five priced the job similarly—about \$15,000—but Editel's unit had "the look, the crispness" WWMT desired, he said.

The art from the promo package also is becoming an integral element in WWMT's sales efforts, Taflinger said, because the new logo and design look are "an essential part of what our station is."

Editel recently completed other promo packages for WTNH-TV New Haven, Conn., WWL-TV New Orleans and WOSU-TV Columbus, Ohio.



New promo push for WWMT(TV) Kalamazoo.

Spotlight On . . .

Carolyn Wean



Vice president
and general manager,
KPIX San Francisco

After almost two-and-a-half-years as vice president and general manager of Group W's San Francisco powerhouse, KPIX, Carolyn Wean believes the secret of the station's success is its ability to carve out a recognized niche in this diverse Bay Area community.

KPIX has put it all together, says Wean, "primarily through our newscasts and local programming. To reflect the area, and hook people to you, you have to pay attention to what's going on locally. And that's what can distinguish you in a market such as this."

And what a market. Not only is it heavily cabled and high in VCR usage, but San Francisco stands as "certainly one of the more complex markets in the country" in terms of both ethnic population, lifestyles and upscale demographics.

"The many, many ethnic groups you have here is just about as diverse as anywhere you can go in the country," says Wean. "Whether you look at Asians and the new immigrants from Southeast Asia in contrast with the second and third generation Japanese and Chinese Americans; Hispanics, mainly from Mexico now, with people coming in from Central America; blacks and other minorities; combined with the national migration to San Francisco during the last 10 years versus the people who had always lived here.

"And so it's hard, when it comes to news coverage and local programming, to find common themes and common issues that cut across the whole society," she said.

repeat advertisers who've come back for more."

Because these new broadcaster-publishers are also in the radio business, where it's not unknown for stations to run contests, they tried it in the magazine, too. They "hid" the KNIX guitar logo all over one issue. It was printed in the corners of articles and in ads throughout the magazine. Then they ran a "Count the guitars" contest with a \$1,000 first prize.

Out of *Tune-In's* 55,000 circulation, the contest generated entries from almost 4,000 readers who sent in their counts. "That's 7% of our distribution—considered very high in terms of average coupon response for print media."

Thirty six radio signals get into Phoenix, and he estimates 1988 radio dollars for Phoenix should come close to \$65 million, vs. to about \$62 million last year.

He's convinced that the success

Add to this diversity the three major urban centers—San Francisco, Oakland and San Jose. "So from a perspective of news coverage or a public affairs campaign, how do you serve all those centers, plus all the surrounding areas? It does pose quite a challenge for everybody in the market and makes competition, which is always tough among broadcasters, even tougher."

Leisure time. Another important factor is the intense competition for leisure time activities. Due to the area's year-round good weather, and the abundance of outdoor activities, stations have to work harder to attract viewers.

KPIX director of sales Kennen Williams elaborated: "In Chicago or Boston, during the winter you're guaranteed that your viewership is going to go up, simply because people don't want to be outside. Here, you don't have those swings in viewership."

Demo power! In the Area Composition Analysis Report for KPIX using ClusterPlus data, released annually by Arbitron, San Francisco had very high indexes for "urban, upscale, professionals, few children" (San Francisco's ADI in this category is 16.44%, compared to the national average of 5.19%); "young, mobile, above average income, white collar workers" (the San Francisco ADI is 23.05% vs. the national 17.78% average); "younger, mobile, singles, few children, urban areas" (San Francisco's ADI is 16.77% vs. the national 12.77%).

Mixed into its strong blend of news and public affairs programming, after more than 11 years on the air, *Evening Magazine*, the forerunner of Group W's syndicated *PM Magazine*, remains the station's showcase. And its offshoot, the morning talk show *People are Talking*, has carved out a respected if sometimes controversial slot for itself as well.

For example, there was the May 23 special on nudist clubs, complete with an all-nude audience. Predictably, the show captured a 29 share.

But KPIX, like most other Group W outlets, is best known for its public affairs campaigns, particularly the *AIDS Lifeline*.

These campaigns, says Wean, "become a community-media-business partnership, something that the TV station could not have done alone. These things we do to serve the community, and what we've seen is that the stations who serve the community remain strong in the market."—**Matteson Barcklay**

of KNIX is due to our consistency—an experienced management team with 40 years of experience running and selling radio stations—and our aggressive sales team. Says Podolsky: "We know how to find and hire aggressive sales people. We hire them for their attitude, then teach them how to sell our audience of country music fans. And now we teach them how to sell both listeners and readers to their prospects."

Appointments

Stations

Robert G. Miller has been appointed general manager of KDIA Oakland-San Francisco. He moves in from Macon, Ga. where he had been general manager of WIBB/WFXM(FM), and before that he had been general manager of Group W Cable in Florida.

Robb Gray, Jr., general manager of WQRF-TV Rockford, Ill., has been elected a vice president of the station. At the same time, Gray has been elected to the boards of both the Illinois Broadcasters Association and the Rockford Area Crime Stoppers.

Gary Dreispul has been named vice president, general manager of Act III Broadcasting's recently acquired WZTV-TV Nashville. He

transfers from the company's WVAH-TV Charleston/Huntington, where he had also been vice president and general manager.

Michael G. Disney has been promoted to vice president, general manager of Cox Enterprises' WIOD/WGTR(FM) Miami. He transfers from Chicago where he had been general sales manager of Cox's WCKG(FM).

Don Kidwell has been appointed vice president, general manager of WEZS(FM), recently acquired by Ragan Henry National Radio from EZ Communications. Kidwell had been vice president, general manager of Voyager Communications' WWMG Charlotte, N.C.

Dick Grimm is now general manager at Lee Enterprises' KGMB-TV Honolulu. The former president of Shamrock Broadcasting's television division has most recently headed his own consulting firm in Honolulu.

Roy Deutschman has been named general manager of Summit Broadcasting's WCAO/WXYV(FM) Baltimore. He moves in from the post of general sales manager at Capital Cities/ABC's WWPR(FM) New York to succeed **Owen Weber**, now executive vice president of Summit.

Representatives

Val Napolitano and **Donald Brownstein** have been elected vice presidents of Petry Television and Petry National TV. Brownstein joined Petry in 1975 and heads the rep's San Francisco sales office. Napolitano, a group sales manager in Atlanta, came to Petry in 1978.

Jerry Jones has returned to TeleRep as San Francisco sales manager and **Mark Winkler** has been promoted to group manager for TeleRep's R Team in Los Angeles. Winkler had been a senior account executive with the R Team. Jones, former TeleRep manager in Memphis, was national sales manager for KTVU San Francisco.



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Television/Radio Age

1270 Avenue of the Americas New York, N.Y. 10020

Wall Street Report

A. H. Belo's fortune tied to Texas economy; rated good longterm buy

Even with much of its potential tied to the lagging Texas economy, A. H. Belo Corp. looks pretty good to three securities analysts at Merrill Lynch. Analysts Peter Falco, Edward Hatch and Lauren Rich Fine agree on a buy recommendation for the longterm but remain neutral for the intermediate term.

The Texas economy is particularly important to Belo because *The Dallas Morning News* is its most valuable property, and of its five TV stations, the biggest and bestest are ABC affiliate WFAA-TV Dallas and CBSer KHOU-TV Houston. It also owns CBS affiliates in Sacramento-Stockton and Tulsa and an ABC franchise in Norfolk-Portsmouth-Hampton-Newport News.

For now, the Merrill Lynch position is that earnings per share will go from \$1.06 in calendar 1987 to 96 cents to \$1 in '88 and \$1.05-1.10 in '89. The stock recently was going at \$30 1/4 per share within a 52-week range of \$21 1/8-38 5/8, and Falco comments, "We believe the stock is fairly valued at current levels and would be attractive after a 10% correction. We feel there is significant upside potential in earnings and underlying asset value when the Dallas and Houston economies improve and with competitive gains in the

Dallas newspaper market. Operationally, the company has done reasonably well in an adverse environment.

Speaking of the performance of the two Texas stations, Falco credits them with "solid competitive performance in a dismal operating environment," as he does the newspaper. He estimates the Dallas ABC affiliate contributes over one-third of broadcast cash flow, noting it is the No. 1 station in the market in most key dayparts.

He adds, "Television revenues were up 6.1% in the first quarter. WFAA and WVEC [Norfolk-Portsmouth-Hampton-Newport News] benefited from ABC's carriage of the Winter Olympics in the first quarter. Given current industry trends, the rate of revenue gain is likely to slow in succeeding quarters. Television costs are being impacted by higher prices for purchased programming, and overall television costs are estimated to be up 8% in 1988."

The Merrill Lynch analysts believe the stock already reflects the improved competitive situation and the possible turn in the Dallas and Houston economies. Falco says, "Recent share prices seem to already presume a bottoming out in the Dallas and Houston economies, which is a good but not certain bet. Additionally, current prices seem to have also factored in a more accelerated improvement in the competitive position of *The Dallas Morning News*, which is also a reasonable but uncertain presumption."

Although there is some evidence that the Dallas and Houston economies have bottomed, he notes, there are only slight signs of a real recovery. He cites the Conference Board's Help Wanted Index for Dallas and Houston as evidence of this.

A. H. Belo Corp. estimated income statements

(Millions, except per share data)

	1986	1987E	% chg	1988E	% chg	1989E	% chg
Newspaper							
Revenue	\$222.5	\$216.5	-2.7%	\$215.5	-0.5%	\$226.7	5.2%
Oper costs	188.5	179.6	-4.7	186.1	3.6	196.9	5.8
Cash flow	34.0	36.9	8.7	29.5	-20.2	29.8	1.2
CF margin	15.3%	17.0%		13.7%		13.2%	
Depreciation	7.9	9.5	19.5	10.5	10.8	11.0	4.8
Segment profit	26.0	27.4	5.4	19.0	-30.9	18.8	-0.7
Segment margin	11.7%	12.7%		8.8%		8.3%	
Broadcast							
Revenue	\$176.0	\$165.5	-5.9	\$167.4	1.1	\$176.6	5.5
Oper costs	95.2	91.6	-3.8	93.9	2.5	100.3	6.8
Cash flow	80.8	73.9	-8.5	73.5	-0.6	76.3	3.9
CF margin	45.9%	44.7%		43.9%		43.2%	
Depreciation	8.8	9.2	3.9	9.4	2.3	10.0	6.4
Amortization	11.6	11.4	-1.5	11.4		11.4	
Segment profit	60.4	53.4	-11.6	52.7	-1.3	54.9	4.3
Segment margin	34.3%	32.2%		31.5%		31.1%	
Total Revenues	398.5	382.1	-4.1	382.9	0.2	403.3	5.3
Net income	20.3	22.3					
EPS	0.90	1.04	15.7	0.98	-6.2	1.08	10.5

Source: Merrill Lynch. E = estimate.

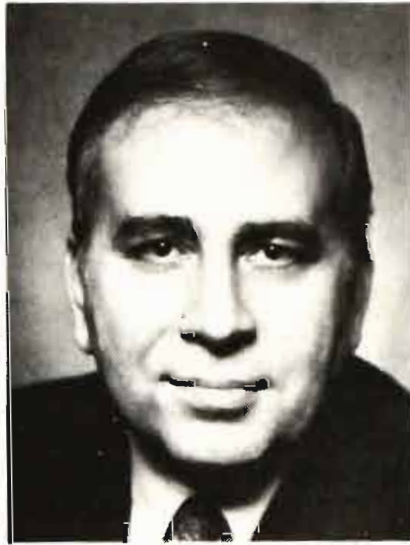
FEEDBACK

What would be the effect on the media marketplace if AGB Television Research closes down?



"I suppose the effect would be to impoverish the number of choices. But other systems are waiting in the wings. I personally hope as many systems as possible stay in the race, because the industry will be better served overall the more competition there is."

*Lucian Chimene
Media research director
McCann-Erickson New York
(nonsubscriber)*



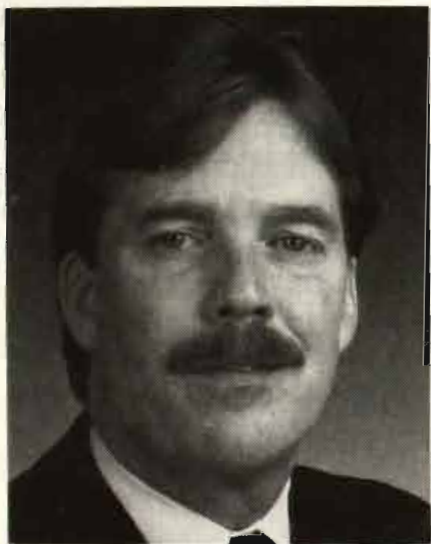
"I think we would lose the advantage we've gotten in having competition there [versus A.C. Nielsen Co.] and in getting improved and reasonably priced service. I think competition has advantages to it. It tends to bring more innovation as well as price leveraging."

*Joseph Ostrow
Executive vice president
Foote, Cone & Belding
Communications
(nonsubscriber)*



"AGB has made some important contributions to the media industry: People meter measurement is the most obvious. But perhaps even more important is the new competitive environment in national television research. AGB has proven that competition is necessary to keep the industry moving forward. For that reason, losing them would be a big loss for all of us."

*Joanne Burke
Media research director
N W Ayer (subscriber)*



"We'd be greatly disappointed. We backed them from day one. Competition keeps everybody on their toes. It's easier said than done; you have to spend the money to force competition. Validity of the results is not the question. It's a matter of responsiveness and innovation."

*Michael J. Drake
Senior vice president
BBDO New York (subscriber)*



"Whatever their fate, AGB has served as an innovative and most welcome player. They have moved our industry forward by introducing several useful tools, including the decade's most important one, the people meter itself. Longtime leader Nielsen has kept pace but remained more reactive. The recent announcements by ScanAmerica and Percy should lead to further refinements and improvements in TV audience measurement."

*David Marans
Vice president
Young & Rubicam New York
(subscriber)*



"I think it would be unfortunate in the sense that a competitive environment always results in a superior service."

*Alan Wurtzel
Senior vice president,
marketing and
research services,
Capital Cities/ABC
(nonsubscriber)*



"Well, it shouldn't have any effect on NBC because we don't use it."

*George Hooper
Vice president, audience
research,
NBC (nonsubscriber)*

Color black-and-white films optimistic, say Hollywood creatives

The creative community seems generally pleased with the progress being made in Washington to obtain legal protection against colorizing all movies. Expectation is that a House-Senate conference body will authorize the formation of a National Film Commission to select 25 films per year which would need formal labeling if they are colorized or altered.

One main proponent of colorizing films for TV is Turner Broadcasting, which indicates it will continue to make available for TV syndication the original black-and-white version as well as the colorized product. While the matter works its way through Congress, the American Movie Classics cable network took a poll recently of viewer's attitudes on colorization. Of the more than 400 letters the company received, it says 99% oppose tampering with classic movies. The survey didn't indicate any of them wouldn't watch tinted films, however.

Patience wailing: Enough is enough, 933 members of the **Writers Guild** said in voting to end the 17-week strike against Hollywood production companies and the TV networks. However, 2,789 writers said nay to the "final" proposal offered by the **Alliance of Motion Picture and TV Producers** and the dissident group itself. The writers voting to end the imbroglio are the big buck fulltime scribes who have more to lose in their wallets than lots of other writers.

So far 114 independent companies have signed special pact with the producers, but the remaining 200 production firms include the top dozen film houses which control upwards of 40 hours of prime-time scheduling.

Comic power: Half of the eight people being inducted into the **Academy of Television Arts & Sciences** Hall of Fame are comics. The whole shebang will be televised Nov. 28 by Fox Broadcasting as a

two-hour special. The inductees are George Burns and his late wife/partner Gracie Allen, the late Jack Benny, Red Skelton, the late Chet Huntley, David Brinkley, David Susskind and David Wolper. The show will be pretaped Nov. 13 at Twentieth Century Fox.

Cover-up: When **KABC-TV** Los Angeles suddenly switched to a rerun of its *A.M. Los Angeles* program recently and told viewers a "technical problem" caused the switch from the actual show to the older taped show, it wasn't telling the truth. The cover-up story was designed to hide the fact the station had received a bomb threat, and everyone in the *A.M. Los Angeles* studio, including the audience, evacuated the building. It turned out to be a false alarm, as no bomb was found.

Sinatra's lure: While Frank Sinatra was being interviewed on *Larry King Live* on **CNN**, King asked him why he didn't do more TV and radio interviews. "Because no one asks me," Sinatra responded. King found that incredulous. So, too, did a number of broadcasters who called his office in L.A. requesting interviews. Susan Reynolds, Sinatra's representative, says the re-



quests came from all over the country from TV stations which have local chat shows and radio stations which play MOR music. But there's a catch, folks. Sinatra isn't doing any interviews this summer.

Fighting back: To stem the flow of runaway TV and film productions, an L.A. city task force has recommended the creation of a film commission to lobby L.A. as the place to stay, or come, to shoot movies. There are approximately 200 domestic film panels promoting their areas, and they seem to have lured enough projects away to force local politicians to say, "Stay home; we'll ease restrictions which force producers to film elsewhere."

LBS live: *UFO Cover-Up* and *Manhunt ... Live* are **LBS Communications'** next two live two-hour specials. The probe of unidentified flying objects takes flight Oct. 14, with the search of the leading mass murder airing Dec. 7. Viewers will be given an 800 number to call in tips to authorities during the program. *Shades of America's Most Wanted*.

Here's Carol: Carol Burnett stars in a one-woman special, *A Conversation With Carol*, airing Aug. 28 on **The Disney Channel**. The show will be taped before an audience at the Disney/MGM Studios at Disney World. She'll also act as host for the channel's fall season preview over the weekend of Aug. 26-28.



George and Gracie are among the new **ATAS Hall of Famers** to be seen in Fox Broadcasting special.

In the Picture

Matthew Field



New 1988-89 NYMRAD chairman says he'll put the association's emphasis on marketing and building new business for radio. He also explains how he turned around classical music WNCN(FM) New York from red to black ink.

Field works to make using radio 'as simple as we can' for its new ad prospects

"With 60 or 70 radio signals coming into the New York market, radio, as wonderful as it is, can be a complex medium for new advertising prospects who haven't been fortunate enough to work with us yet. One key NYMRAD goal is to make radio as simple as we can for them."

That's Matt Field speaking. He's a born and bred New Yorker, vice president, general manager of WNCN(FM) and new 1988-89 chairman of NYMRAD, the New York Market Radio Broadcaster's Association.

Field points to the "tremendous changes in ownership and formats of radio stations across the whole country in general and in New York in particular. The financial pressures on the new owners and their managers have escalated with radio's potential and its opportunities. NYMRAD's job is to keep working to make those opportunities happen. That's why, as long as I've been on NYMRAD's board, I've been a big backer of the work Maurie Webster and our marketing directors, Shirley Baker and Sandy Josephson, have been doing. Marketing is essential if radio is to continue to grow and win a bigger share of retail advertising dollars."

Field adds, "Today, with cable continuing to fragment television's audience, radio has never had a better opportunity to make it happen. Our ability to help advertisers get more for their money by targeting specific groups of their best customers has never been more valuable to them."

The fun part

Up until three or four years ago, he recalls, NYMRAD was known primarily for its social events. "That's the fun part," says Field. "But it's important because of the terrific dialog we develop, both internally, among our station people and externally, as a pipeline to the larger community we all serve."

With NYMRAD's quarterly meetings with community leaders, explains Field, "NYMRAD is the liaison

between New York's radio stations and the community. These get-togethers provide our news directors and correspondents with the key community contacts. It's part of ascertainment. We feel it's still our responsibility, with or without the forms, with or without the deregulation.

"In these meetings we break up into small groups of station people, who, between the groups, interview each of about 150 different community leaders a year. Besides giving our news people and public service coordinators important contacts, our general managers and sales managers find out what's on the minds of the movers and shakers of a market that in many ways is a world capital, even if it isn't an official seat of government."

But Field comes back to the fact that NYMRAD's No. 1 priority is marketing. He recalls, "Before we got into it as deeply as we are now, and the reason we did, was because our board saw the opportunities we'd been missing for radio to get a stronger message across to the hundreds of newspaper advertisers who had never tried radio about the sales impact we can make when retailers know how to use radio. Three years ago we grabbed for those opportunities, and we've been running with them ever since."

Turning WNCN around

Back at his own urban ranch, Field recalls that WNCN had been a classical music station between 1956 and 1974 when Starr Broadcasting bought it and switched the sound to acid rock. Then GAF bought it in 1976 and brought back classical music.

But the station hadn't been a moneymaker under either format. Enter Field, hired in 1976 as program director. With WNCN as the second classical music station in New York, recalls Field, "I kept the music but changed the pace and our air personalities' style to reach the younger, 25-54 audience. We even added contests, some as far out as you'd hear on a rock station only based on classical music." From then on, the audience grew, and the average age of its listeners dropped. In 1976, 65% of the audience was over 50. Today, Field says, 70% is 25 to 54, with a median age of 42. The number of listeners jumped 50% from around 400,000 in 1976 to 670,000.

In 1980 Field was promoted to general manager, and the following year WNCN reached black ink for the first time. He reports WNCN's profit hit \$1.6 million last year: "We play classical music, but we select it very carefully to build a winning playlist. And between the music our listeners hear everything from comedy bits, sports scores and traffic reports to *The Wall Street Journal Report*. And our contests sound as crazy as anything you'd hear on any other format.

"Except for the music, our station sounds like our personalities are wearing T shirts, not tuxedos. And when they introduce a classical piece they don't go on interminably about its history and the composer's entire life history. As our promotion says. 'The music is classical, but the pace is New York.'"

When he's not working for WNCN, NYMRAD or classical music, Field is a practiced magician, good enough not only to entertain his kids but to hold membership in the Society of American Magicians.

WASHINGTON ROUNDUP

Maybe some gains in indie ratings, renewals—not in 'indecenty'

The broadcast industry counted a good string of wins in Washington, getting help from the FCC, the rating services, and the U.S. Congress. The price to be paid was adoption of a piece of legislation the industry would rather not see and escalation of the FCC fight against indecent programming.

All that came while broadcast executives were in town for two separate gatherings, sponsored by the

National Association of Broadcasters and the Association of Independent Television Stations (INTV). The board of directors of the NAB heaped praise on the FCC for issuing a notice of inquiry into some of the methods it can take to eliminate some of the abuses in the comparative renewal process.

Among the proposals the agency is putting out for comment is one that would limit the amount of

money ("greenmail") if any, that should be allowed to change hands in order to get a license challenger to withdraw. Another proposal is to beef up the filing requirements so the agency can determine who are the real applicants and not just those seeking greenmail.

The broadcasters really like the proposal that would give them a certain amount of "renewal expectancy," based on their past service as a licensee, including whether it provided "substantial" or "meritorious" service. All of it, of course, is far short of the reform of comparative renewal that broadcasters want but is as much as they can

the marketplace

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hope to get without as easing of the rules by Congress.

Abused indies. At the other end of town, the general managers of independent stations apparently were able to do what the INTV staff had been unable to do to date—persuade the Arbitron and Nielsen rating services to highlight the differences between the ratings received via the diary method and those obtained off meters. The GMs were shown graphs that purport to prove that independents have been underreported by the diaries used by the two services.

Each of the services has prom-

ised to provide information that the INTV could use as the basis for a report that can be furnished to would-be advertisers to confirm the independents' contention they have more viewers and therefore should attract more advertising than has been the case. But don't expect to see any of it before sometime next year, says Ron Inman, vice president for marketing.

Kristel clear. Despite broadcaster complaints that its policy is too vague to expect anyone to adhere to it, the FCC followed through on its indecency guidelines to levy a fine against KZKC-TV Kansas

City, Mo., for its earlier showing of the movie *Private Lessons*, starring soft-pornier Sylvia Kristel.

The station was one of five that were cited for showing the film. But the commission fined KZKC \$2,000, the maximum that could be assessed, because it found "the station's arguments in defense unper-
suasive."

The FCC said KZKC, as did all other stations, had adequate notice of what type of programming would be allowed, but NAB board chairman Wally Jorgenson said the fine was unfair because the FCC guidelines on what it considers indecent programming are vague.

the marketplace

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Washington Report

'We have met the enemy, and he is us,' says NAB in latest white paper

For many years, as some critics are fond of reminding us, the broadcast industry fought to hamper the ability of cable to be a competitive medium. It lost that battle and now apparently has a new encroaching enemy—itsself.

In 1970, there were 4,344 AM radio stations. As of last February, there were 5,078. The number of FMs has increased at an even greater rate during that period, from 2,651 to 5,950. TV stations have grown from 1,038 in 1970 to 1,622 today.

Enough already, says the National Association of Broadcasters in a white paper just issued, "Is More Necessarily Better?" The handiwork of Jeff Baumann, the organization's vice president and chief counsel, the paper argues against the creation of many new licensees.

The main argument in the white paper? Too much competition. Citing the figures above, the paper says, "Even in light of this highly competitive marketplace, it has been suggested that the FCC crowd in more stations, downgrade some stations to increase the power of other stations and make room for more new stations, permit the use of FM translators to grow without adequate safeguards, consider the use of FM directional antennas which could then permit additional stations to be 'shoe-horned-in,' and authorize a 'low power' FM service. The FCC still has before it a docket dealing with VHF drop-ins.

"Moreover, others have proposed permitting 'negotiated interference,' i.e., allowing a station to negotiate what level of interference it is willing to accept from other stations. Negotiated interference also could lead us down the slippery slope towards the creation of more new stations."

'Marketplace' who?

A strong supporter of the "marketplace" and those who would let it determine governmental policy, the NAB—whose board approved the paper as official—nonetheless says that at least in this instance, the marketplace does not work. "While economic theory would hold that the marketplace should determine when there are too many stations," the paper says, "this theory does not consider the unique nature of broadcasting.

"Unregulated economic competition in the communications industry is likely to destroy a local radio or television station's ability to broadcast nonentertainment programs and fulfill its obligations to its community of license."

The NAB, of course, is an organization composed of those already in the broadcast business and not of those wishing to get in. So the paper takes pains to cite a public interest in curtailing competition. "The intro-

duction of more and more new stations in any market will cause a dropoff in audience and accompanying revenues for existing stations," it says. "Because there would be no accompanying decrease in operating expenses, the station would have to make cuts in staff or make programming changes."

So far, the broadcasters sound like anyone else facing stiff competition for limited dollars. But the public would be affected, too, the white paper adds. "Resources that used to be devoted to programming and community service might, of necessity, have to be devoted to just staying on the air. A station could be forced to choose between subsidizing news and public affairs, thereby reducing an already low profit margin or reducing the amounts of news and public affairs programming, thereby risking the chance of losing its license for failure to fulfill its issue-responsive programming obligations."

The paper goes on to cite other dire possibilities. The amount of diverse programming would shrink while stations program to the lowest common denominator, it predicts. "Innovation and experimentation could become too risky." And narrowcasting would become a thing of the past in some markets, the paper adds.

More not always better

And there is precedent for limiting the market expansion, Baumann's paper says. "The FCC has realized that in some instances, more programming is not always better.

"In eliminating its rules, which limited duplication of programming on co-owned AM and FM stations in the same local area, the FCC noted that the current economic conditions in radio markets justified allowing co-owned stations to duplicate programming. The FCC recognized that it was better to allow stations to duplicate programming and take advantage of economies of scale than for AM stations to shut down."

The paper adds, "Clearly, actions to increase the amount of quality programming are better than simply increasing the number of programming sources." At some point, the paper says, someone is going to have to ask when adding more stations is going to reduce the quality of program diversity.

The paper concludes: "Broadcasters are not afraid of competition, but are afraid of a marketplace so congested with stations that, for technical and economic reasons, no one can compete effectively. The obvious result will be a diminishment of overall service to the community.

"The reality is that creating too many new stations would create an environment which is not beneficial to the public. There are a number of marketplace and nonmarketplace forces at play in determining communications policy. Taking a simplistic approach of pumping more outlets into the system will not assist in reaching the most efficient and socially optimal solution to the diversity quagmire. "To have an effective broadcasting system requires some policy coordination as well as the healthy influences of marketplace forces. In adding new stations, it should be remembered that 'in excess even nectar is poison.'"

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