

MEDIAWEEK

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ABC's Start Buffets Disney

Network's sluggish early-season ratings no help for troubled giant PAGE 4

TV STATIONS

Buyers Demand N.Y. Makegoods

Ratings drops result from weakened signals

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RADIO

D.C. FM Slashes Commercial Load

Bonneville station cuts back to 6 min./hour

PAGE 6

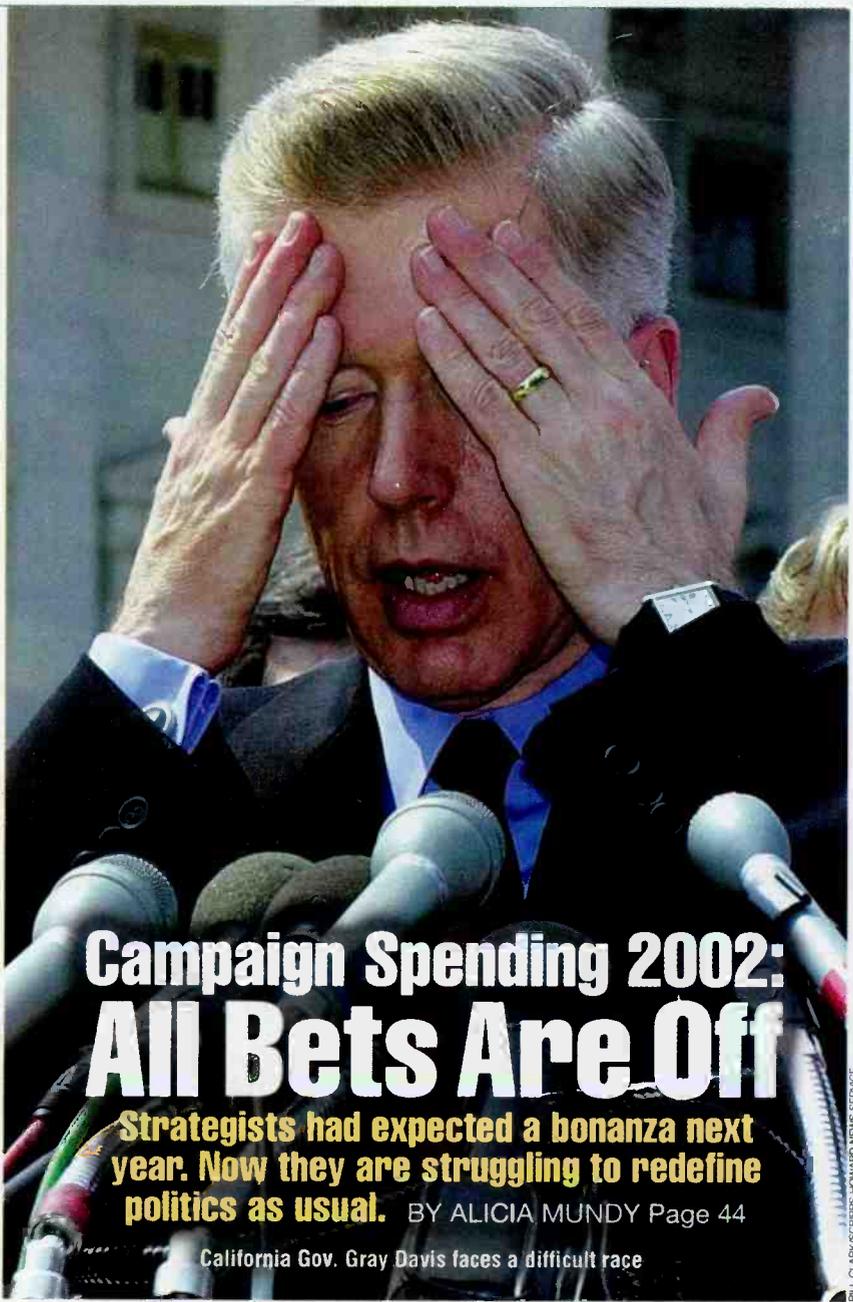
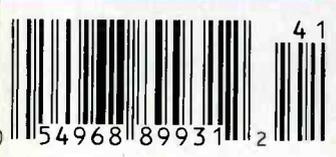
SYNDICATION

Freshmen Face Chopping Block

Ananda, Iyanla, Eliminate, others in danger

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Mediaweek Magazine Monitor PAGE 53



Campaign Spending 2002: All Bets Are Off

Strategists had expected a bonanza next year. Now they are struggling to redefine politics as usual. BY ALICIA MUNDY Page 44

California Gov. Gray Davis faces a difficult race

MARKET INDICATORS

NATIONAL TV: SLOW
Scatter sales are or hold as buyers wait to see how the new season's ratings shake out. Decisions on first-quarter scatter cancellations have been delayed until the end of the month.

NET CABLE: WEAK
Aside from ESPN's NFL inventory, little fourth-quarter scatter activity is working. News networks have picked up new business from beer, movies and cellular phone companies.

SPOT TV: SHIFTING
Stations are still trying to shift inventory preempted by coverage of the Sept. 11 attacks, but a new crisis looms: Retail may be weaker than expected for the next three months.

RADIO: STALLED
Inventory is widely available despite a slight uptick from fast food, autos, soft drinks and beer. Retail, entertainment and TV tune-ins are soft.

MAGAZINES: MIXED
Pharmaceuticals are staying the course in first-quarter spending. Fourth-quarter insurance dollars are dropping off among business and weekly titles.

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ABC Creates Teams to Sell All Dayparts

ABC is reorganizing its sales division, setting up teams that will be able to sell across all dayparts, replacing the network's existing system in which separate sales units sold individual dayparts. The shift, which has not formally been announced, is being spearheaded by Mike Shaw, ABC sales president, to better serve the media agencies, which—especially in the most recent upfront buying period—expressed a desire to buy all dayparts at the same time. Both CBS and Fox have some sales personnel that sell across all dayparts; ABC's move will leave NBC as the lone Big Four network with separate sales units for each daypart. ABC officials would not comment on the reorganization, but buyers familiar with the changes said that Gary Montanus, currently head of Disney Kids Network sales, is expected to get a more prominent position following the restructuring.

Wenner Cuts More Staffers

Wenner Media last week laid off approximately a half-dozen people in production and back-office operations. The latest round of cuts brings the company's total layoffs this year close to 25 percent of its staff. A company representative said the cuts are an attempt to streamline the company during the present economic slowdown. Wenner flagship *Rolling Stone* has slipped 18 percent to 1,207 ad pages through its Oct. 25 issue, according to *Mediaweek Magazine Monitor*.

Stations Resist People Meters

Nielsen Media Research last week said it will turn on people meters in Boston for the May 2002 TV sweeps, dispensing with the current methodology of set-tuning meters and diaries used in 53 other local markets. While cable operator AT&T Broadband and regional news service New England Cable News have signed up for the service, Boston TV stations, which have seen their ratings decline during the demonstration period, are holding out. "We've operated without Nielsen ratings before, and we can do it again," said Michael Carson, vp/general manager of NBC-owned WHDH-TV. Nielsen is helping agencies craft letters to stations encouraging them to sign up for the new measurement device. MediaCom executives have given presentations to all the market's stations advocating meters.

MTV Nets Restructures Sales Unit

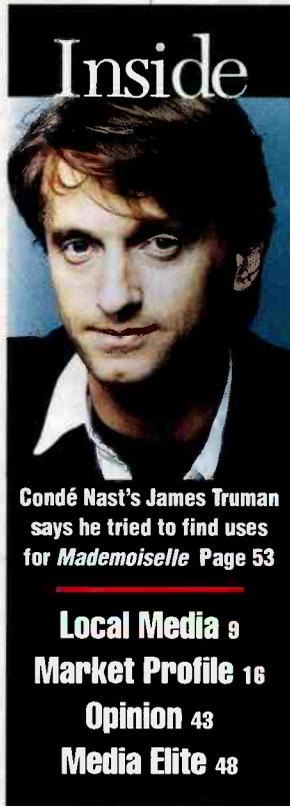
MTV Networks restructured its sales force last week into two groups. Sue Danaher was named executive vp/general sales manager of the new entertainment group, which includes Nickleodeon, Nick at Nite and TV Land, in addition to TNN: The

Laura K. Jones OCT 09 2001

National Network. Doug Rohrer was named executive vp/general sales manager of the music group, which includes MTV, VH1 and now CMT. As a result of the changes, Tom Cavallaro, sales chief for former CBS Cable properties TNN and CMT, has left the company.

Primedia Stock Hits a Record Low

Primedia Inc.'s financial troubles escalated last week as the company's stock slipped to a record low, closing at \$1.82 at press time last Friday. Primedia may also be close to shedding some special-interest magazines. While a Primedia spokesman had no comment, several analysts reported that the company could announce as early as this week which unit(s) it will put up for sale in order to raise the \$250 million it promised investors after its \$515 million purchase of Emap USA in July.



Condé Nast's James Truman says he tried to find uses for *Mademoiselle* Page 53

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Addenda: Rino Scanzoni, former executive vp/managing director of MediaVest, is in talks to fill Bob Igiel's post as president of national broadcast at The Media Edge. Scanzoni may not be able to start until January, when his non-compete clause with MediaVest expires... **The Television Bureau of Advertising** and several major media shops—including Initiative Media, The Media Edge, BBDO/PentaMark, MediaVest and MindShare—last week released a set of uniform standards they would like computer software makers to incorporate into programming that handles electronic data interchange... **Forbes** will freeze its ad rates for next year at \$77,760 for a four-color page. The business biweekly, which raised its rates 20.6 percent over the last two years, has decided a rate increase at this time would hurt business... **News Corp.**'s Fox Stations Group is expected to announce it will swap TV stations with Meredith Corp. Under the deal, Fox would own two stations in Orlando, Fla. (Fox outlet WOFL and UPN affiliate WRBW) while Meredith would own two outlets in Portland, Ore. (UPN affiliate KPTV and Fox outlet KPDX)... **Fox News Channel**

signed Shepard Smith to a multiyear contract last week. Terms of the deal were not disclosed.

Corrections: An At Deadline item in last week's issue about John Rollins' resignation as president of *Spin* should have said that Rollins returned to the magazine, where he spent part of his early career, as group publisher in 1997 after the title was acquired by *Vibe/Spin* Ventures. Also last week, the name of Kristin Peace, vp of development for Paramount Domestic Television, was misspelled in the Movers section.

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Fox: 80% Sold for Baseball Playoffs, 75% for Series

By late last week, Fox had sold about 80 percent of its ad inventory for baseball's American and National League divisional and League Championship Series games. The network had sold about 75 percent of its World Series inventory. "It's definitely been slower than in years past, but we are talking to a good number of people," a Fox network executive said. Fox begins televising baseball's four divisional series tomorrow night.

Most of the remaining inventory for the best-of-five-game divisional series telecasts is in games four and five; for the best-of-seven League Championship Series, most of the avails are in games five through seven, the Fox exec said. Fox has been selling 30-second spots on the divisional games for \$145,000. On the six days when there will be divisional games on Fox's sister cable outlet Fox Family Channel, advertisers will receive an additional spot in those games.

Fox has been selling :30s on the two League Championship Series, set to begin on Oct. 16, for \$135,000. Spots for the World Series, to start Oct. 27, are going for \$350,000. —John Consoli

Nascar Races to Its Best Rating Vs. NFL Telecasts

NBC's telecast of the Protection One 400 Nascar race from the Kansas Speedway on Sept. 30 earned a 4.7 rating/11 share in households, the best ever for an auto race that aired in direct competition with NFL games. The Protection One aired against Fox's NFL telecasts. Nascar's previous best against NFL coverage was a 4.5, delivered by an NBC telecast on Sept. 23 and by CBS for an October 1997 race.

Nascar has averaged a 5.3/13 in households on six NBC telecasts since July. The races have averaged a 4.8 among viewers 18-49 and a 5.4 in 25-54. On the TNT cable network, six Nascar events since July have averaged a 4.4/10, surpassing TNT's NBA playoff ratings from last spring.

In the first half (continued on page 6)

ABC Not Much Help for Disney

Network's slow start this season adding to troubled giant's woes

THE INDUSTRY By John Consoli

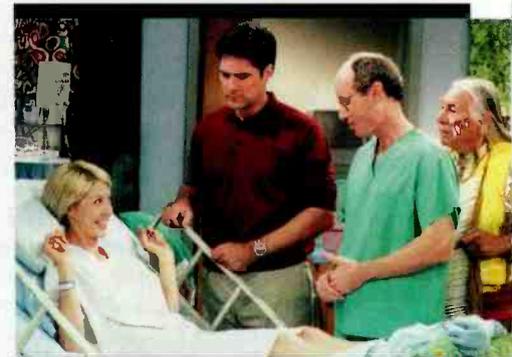
Walt Disney Co., already battered by declining attendance at its theme parks as a result of the lagging economy and fear of travel following the terrorist attacks, could take another financial hit due to weak viewership for many prime-time programs on its ABC network.

While it is still early in the new TV season, three of ABC's mainstay sitcoms—*The Drew Carey Show*, *Spin City* and *Dharma & Greg*—are falling well short of the ratings guaranteed to advertisers. And the network's signature game show, *Who Wants to Be a Millionaire*, is down 35 percent in household audience from last year.

According to financial analysts, ABC provides about 17 percent of Disney's annual revenue and 6 to 7 percent of the company's operating income. A significant underperformance of programming below ratings guarantees in last summer's upfront buying period could lead to significant lost revenue for the network as a result of makegood advertising time.

ABC's early-season woes are not good news for a company that saw its stock price tumble to a 52-week low on Sept. 20 and had its credit and debt ratings downgraded the following week by Moody's Investors Service. While the performance of Disney's theme parks and resorts unit will have a much greater impact on the company's bottom line, the high profile of ABC can weigh heavily on public perceptions.

Media buyers are concerned about how sharply ratings on the network's signature shows dropped from the first to the second week of the new season. *Dharma & Greg* fell from an 8.0 rating/12 share in households on Sept. 25 to a 5.8/9 on Oct. 2. *Spin City*, even with a return appearance by Michael J. Fox in both episodes, fell from an 8.7/12 to a 6.9/10. *Drew Carey*, the network's top sitcom, drew mediocre 6.4/10 and 6.6/10 ratings in its first two outings. Last summer, ABC signed a new deal with Warner Bros. to keep *Drew* on the air through 2004 at a cost of \$3 million per episode beginning next season. ABC is paying about



Weary veterans? ABC's *Dharma & Greg* (top) and *Spin City* declined in both household and 18-49 ratings in their second episodes last week.

\$2.4 million per episode this season.

Millionaire, which averaged an 11.6 rating last season on Thursdays, is averaging just a 7.5 this season; on Mondays, the show is at a 7.2.

Other trouble spots for ABC are the new shows *Bob Patterson*, which premiered to only a 6.7/10, and *Philly*, which opened with a 9.2/15 but dropped to a 7.2/12 in its second week.

Kevin Brockman, ABC vp of media and artist relations, said criticism of the network's programming is "premature." Brockman noted that ABC's total first-week prime-time ratings were up to a 3.9 among viewers 18-34 (from a 3.7 last season) and up to a 4.7 in the 18-49 demo (from a 4.6). "That's what advertisers buy," he said. The median age of ABC's viewers has been reduced from 47.1 years to 43.9 this season, giving ABC the youngest audience of the Big Three nets, Brockman said.

One success so far among ABC's veteran

shows is *The Practice*, with an 11.4/19 in households and a 7.2/18 in 18-49 in its premiere. Three new series have shown some promise: *Alias* (9.5/14 in homes and a 6.2/14 in 18-49 in its premiere); *According to Jim* (8.0/13 HH, 5.7/15 in 18-49); and *Thieves*, which earned a 6.3/11 on Friday, a night with low viewing.

Yet the improvement in ABC's median age is primarily the result of the network dropping two hours this season of *Millionaire*, which has a high percentage of viewers 50-plus. And while ABC was up in 18-49 demo ratings over last season in its first week, demo results for several key shows did not advance in week two. *Dharma & Greg* fell from a 5.0/14 to a 3.3/9, *Spin City* dipped from a 6.5/13 to a 4.3/10 and *Drew* was flat at a 4.9/12. Media buyers said that for all three shows, those second-week numbers were lower than what ABC guaranteed in the upfront.

For any network, an erosion of several veteran shows can signal long-term problems. "If you have a core of established shows doing well, then even if your new shows fail, you have something to fall back on," said Steve Sternberg, vp of audience research for Magna Global USA. "But if your returning shows are in decline, you must develop new hits."

"Right now it's a war of attrition for ABC," said John Rash, chief broadcast negotiator for Campbell Mithun. "*Dharma*, *Spin City* and *Drew* are not going to bring in any new viewers at this point, but it's important for them to hold on to their traditional audience and not erode. Unfortunately for ABC, that is not happening."

ABC had problems even before the season began, having suffered the biggest decline of any of the Big Six networks in last spring's upfront. ABC sold \$1.7 billion of upfront time this year, down 26 percent.

A bright spot in Disney's portfolio is its TV studio, which, after 20th Century Fox Television and Warner Bros. Television, has the third-largest number of prime-time series on the networks this fall. The studio, headed by Steve McPherson, placed 7 new series on the nets, bringing its total to 12. New shows include *Alias*, NBC's *Scrubs* and the WB's *Maybe It's Me*, a coproduction with Warner.

Syndication, however, is a different story. Although *Regis and Kelly* continues to succeed, Buena Vista's new *Iyanla* has done poorly (see story on page 6). And the prospects for the syndie version of *Millionaire*, set to premiere in fall 2002, have dimmed considerably.

Despite the company's current problems, most analysts don't see Disney as a takeover target, primarily because all of the bidders would face antitrust problems. As one analyst noted: "All the likely suitors have financial problems of their own." —with Alan James Frutkin ■

N.Y. Signals Falling Short

Media buyers demanding local makegoods following poor ratings results

TV STATIONS By Jeremy Murphy

Four weeks after terrorist attacks destroyed the World Trade Center—upon which several TV antennas were built—many New York TV stations are still without powerful over-the-air signals and are now scrambling to find replacement antennas as their ratings in the No. 1 market drop. But that's not the only crisis they're battling—media buyers are now demanding the stations offer makegoods because the stations have thus far failed to make ratings guarantees.

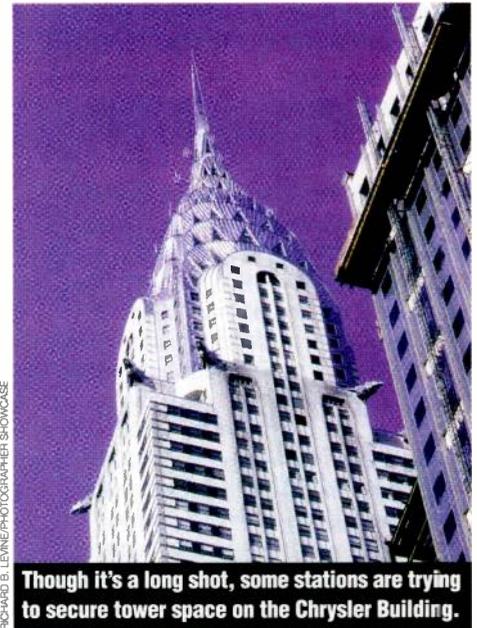
"All the stations are telling us that they're working to get their antennas back up, but the bottom line is we've made media buys guaranteed at certain points," said Allison Shapiro, vp/assistant director of local broadcast at Zenith Media. "If they're not going to generate the points, the stations are going to have to make good. A lot of bonus points are going to have to come from the stations that are suffering. They're going to have to offer [inventory] at lower prices."

"Any buyer worth their salt should be doing this," agreed Pam Austin, broadcast account supervisor at MediaVest, noting that "it's been a real give and take. Everybody's pulling punches, trying to be very conservative with their estimates. No one knows what's going on."

One executive said that stations are still assessing the ad-revenue losses, but expects them to go "well into the millions."

Most of the market's big stations—including network flagships WNBC, WABC and Fox's WNYW, as well as UPN affiliate WWOR and Tribune's WB affiliate WPIX—saw their main antennas (and backup signals) go down with the WTC, and it could be months, if not a year, before they can erect replacement antennas with the same reach and power. (WCBS and Univision's WXTV—which have their antennas atop the Empire State Building—are the only two stations in the market operating at full power.)

Eighteen percent—or 3.3 million—viewers in the New York DMA do not subscribe to cable and are forced to rely on over-the-air signals. The loss of those stations' antennas has left more than 48 percent of homes in the Brooklyn area alone unable to receive over-the-air signals, according to Nielsen Media Research. Stations must now assure advertisers their messages will be seen and heard just weeks before the November sweeps begin.



RICHARD B. LEWIS/PHOTOGRAPHER SHOWCASE

Though it's a long shot, some stations are trying to secure tower space on the Chrysler Building.

WABC, which is now using a weak 2 kilowatt antenna, averaged just a 3.7 rating/9 share sign-on to sign-off the first week of October, down from last year's 4.5/11. The station is now virtually tied with WCBS, which has shot up to a 3.8/9 from last year's 3.1/8. Despite its weakened signal reach, WNBC is still tops in the market, at a 4.9/12.

"They're going to need to get all this done by November," Shapiro said. "Is that going to happen? Who knows? But probably not."

WNBC, WABC, WPIX, Telemundo's WNJU and public TV outlet WNET are all using temporary antenna masts in Alpine, N.J., across the Hudson River from the city; but at 920 feet, the site is far shorter than the WTC's 1,725 ft. height. Any effort to make it taller will require approval from Alpine city officials. Additionally, the temporary antennas are not nearly as powerful as the original antennas used atop the WTC. The temporary antennas are using a directional signal that is aimed southwest and northeast but has trouble penetrating parts of Brooklyn and Long Island. Stations are hoping to start using an omnidirectional antenna by the end of the month.

But it's going to take a lot longer for them to build permanent antennas. Stations are looking at staying in Alpine or putting up new antennas atop the Chrysler Building or on Bear Mountain, north of New York City. ■

of this year, Fox aired 14 Nascar telecasts, averaging a 6.2/15. —JC

Allbritton, Cox at Odds Over Carriage in Suburban D.C.

An Allbritton Communications executive said last Friday that Cox Cable would be subject to Federal Communications Commission fines and a copyright lawsuit if the cable operator continued to carry Allbritton's ABC Washington affiliate WJLA-TV and local cable service News Channel 8 over its Fairfax County, Va., system after the two parties' carriage agreement expired on Oct. 6.

Jerald Fritz, Allbritton senior vp, said that Cox had received advance notice of Allbritton's intentions to pull the two stations off Cox's systems in Fairfax County, which reach more than 200,000 homes. Cox said last Friday that it would not remove the two stations' signals.

Allbritton has been negotiating to renew its retransmission deal with Cox. Cox claims Allbritton's renewal price is too expensive; Allbritton says Cox is using its monopoly position to demand lower rates. —Alicia Mundy

AT&T Pulls Out of Cable's Western Show in November

AT&T last week joined the growing list of companies that have dropped out of the annual Western Show, to be hosted by the California Cable Television Association next month in Anaheim, Calif.

Advance registration for the convention is down 10 to 20 percent from last year, according to a CCA representative.

While most major cable operators outside of AT&T are still expected to attend, about 30 programmers have opted out, including Turner Broadcasting System and Fox Cable Networks Group.

Most companies that have pulled out have cited the poor economy and their bans on air travel following Sept. 11.

However, the Western Show will go on. The tenor of the confab has changed in recent months to be less about cable carriage negotiations and more about broadband technologies. There are 336 exhibitors signed on, of which 30 are programmers and 93 are tech firms that did not attend last year. —Megan Larson

Bonneville Cuts Spots

Takes risk by reducing hourly ad load to six minutes on CHR outlet in D.C.

RADIO By Katy Bachman

Bonneville International's Contemporary Hit Radio outlet WWZZ-FM in Washington, D.C., has boldly moved to reduce its commercial spot load to an unprecedented six minutes an hour—four minutes less than any major-market station. Z104's hourly spot load had been 14 minutes in morning drive and 12 minutes elsewhere.

At the same time, WWZZ is tweaking its programming to appeal to an older 18-49 female audience in order to differentiate the station from Clear Channel's WIHT-FM. In April, CC flipped WIHT's format from Jammin' Oldies to CHR and quickly gained on WWZZ, overtaking it by one-tenth of a rating point among 18-34 year olds in the two most recent Arbitron monthly ratings trends.

The far bigger risk for privately held Bonneville is the spot-load reduction since it plans WWZZ to hike ad rates by 40-50 percent in order to cover the loss of inventory, at a time when the marketplace is extremely soft. "This experiment works if ratings go up and if advertisers are prepared to pay more," said Bruce Reese, president/CEO of Bonneville.

Since consolidation, radio stations have loaded up their commercial pods, causing an outcry among both listeners and advertisers. Spot loads of 14-15 minutes are common and they can run up to 20 minutes. "It's gotten

worse and worse," said Mark O'Brien, vp/general manager of WWZZ.

Listeners are tuning out. Time spent listening has slipped 9 percent since 1996, while female listening levels have dipped nearly 14 percent. According to a recent Arbitron study, 76 percent of women surveyed cited commercial clutter as the primary reason they tune out.

But will radio buyers be willing to pay a premium for leaner pods? "Fewer spots gives my spots more impact," said Charli King, vp and associate media director for Arnold Communications, who placed a full schedule on WWZZ as the regional buyer for McDonald's.

"Advertisers would pay a little more to have their ads stand out. It's money well spent," agreed Sylvia Shammah, local broadcast supervisor at The Media Edge, who buys for AT&T.

Naturally, rival radio execs are more cynical about Bonneville's move. "The reason they went to a low spot load was not to save the industry, but to save themselves in a battle against Clear Channel," said David Pearlman, Co-COO for Infinity Broadcasting.

"Fewer spots will not necessarily equal more or better results, and to expect advertisers to pony up due to fewer spots is unrealistic. I'd bet that the spot load will increase from six units in less than six months," predicted John Hogan, Clear Channel COO. ■

New Talk Shows in Trouble

Several weak daytime strips are expected to get a quick hook this season

SYNDICATION By Daniel Frankel

Adding bad premiere ratings to poor ad sales for most of their new first-run strips, syndicators this year are likely to cancel many of these shows before January rather than produce full-season commitments. And syndication execs, eager to fill those gaps with new product and double-runs of existing shows, have started circling.

At risk of cancellation because of their high production costs are several new daytime talk shows averaging below a 1.5 household rating. For the week ended Sept. 23, King World Productions' *The Ananda Lewis Show* (1.3), Buena Vista Television's *Iyanla* (1.2), and NBC Enterprises' *The Other Half* (1.0) all fit this criteria,



Divorce Court, starring judge Mablean Ephriam, is being pitched as a fill-in for canceled strips.

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according to Nielsen Media Research. The syndicators of these shows declined comment.

"This has been one of the most troublesome years ever in syndication," said Dick Robertson, president of Warner Bros. Domestic Television. "Most of the new shows clearly aren't working. And once stations downgrade them, it'll be over for them. How long do you want to stick with [a low-rated strip] in this economy?"

In early and late fringe, the new reality dating strips *Elimidate* from Warner Bros. (1.0), *Rendez-View* (0.8) from Paramount Domestic TV, and *Shipmates* (0.8) from Columbia TriStar TV Distribution are also off to slow starts.

"Looking at these business models, I don't know how they can keep producing them with ratings under a 1.0," said Laura Caraccioli, director of Starcom Entertainment.

Among all the new first-run syndie pro-

grams that aired in the week ended Sept. 23—during which news pre-emptions were still a factor—only Studios USA's *Crossing Over With John Edward* (1.7) finished above a 1.5 rating.

With good time periods expected to open up in January due to cancellations, syndicators are positioning themselves to take advantage. NBC has set a Jan. 7 debut for the syndicated version of *Weakest Link*, hosted by George Gray (of TLC's *Junkyard Wars*). NBC is looking for more early-fringe clearances for *Link*, currently cleared in 60 percent of the U.S.

Distributors of lower-cost court shows are pitching double-runs to fill gaps. "We're anticipating that there will be opportunity in January," said Paul Franklin, executive vp/general sales manager of Twentieth Television, distributor of *Divorce Court* and *Power of Attorney*, which posted 2.5 and 1.7 averages respectively for the week ended Sept 23. ■

Attacks Alter Cable Lineup

24-hour news nets break into top 10; Lifetime, Nick still tops in prime, total-day

CABLE TV By Megan Larson

Though Nickelodeon and Lifetime again won the total-day and prime-time ratings competitions respectively, cable's third quarter belonged to the 24-hour news networks. CNN proved again last quarter that it is indeed the preferred network to watch in times of crisis. Boosted by high September audience levels tuning in for coverage of the terrorist attacks and their aftermath, CNN edged out Lifetime for the No. 1 slot last month with an average 2.0 rating (1.2 million households). CNN became a top-10 network in the third quarter, growing its household ratings 100 percent over the same period last year to a 1.2 (1 million households). Outside of the *MTV Video Music Awards* (the highest-rated show in the third quarter with an 8.6, or 6.9 million households), ESPN Sunday-night football and Nick's *Rugrats*, the top 100 programs in the third quarter were primarily CNN news reports on the attacks and President Bush's addresses to the nation.

Fox News Channel, which generated a 1.5 rating (1 million households) in September, also made it into the top 10 in the third quarter, growing its household ratings in prime time 120 percent to a 1.1 (735,000 homes). And MSNBC, scoring a 1.1 (742,000) in September, had its best quarter ever, growing prime-time ratings 75 percent to a 0.7 (449,000). While MSNBC typically attracts younger audiences, a higher number of viewers



18-49 and 25-54 tuned in to CNN in the third quarter. CNBC also experienced gains in September. And CNN's oft-criticized Headline News, which was recently revamped, earned an 0.5 (413,000 homes) in September and grew its prime-time ratings in the third quarter by 50 percent to a 0.3 (251,000).

The irregular news-viewing patterns shook the cable network hierarchy, but little changed in the third quarter in terms of audiences lost or gained by the non-news networks. Discovery, A&E, TBS Superstation, TNT and USA remained flat to slightly down in households, while TBS and USA beat Lifetime among viewers 18-49. ESPN was also down, while BET and younger networks like TNN, Hallmark Channel and Game Show Network grew their ratings and household delivery in the quarter. The History Channel and Food Network also registered growth. ■

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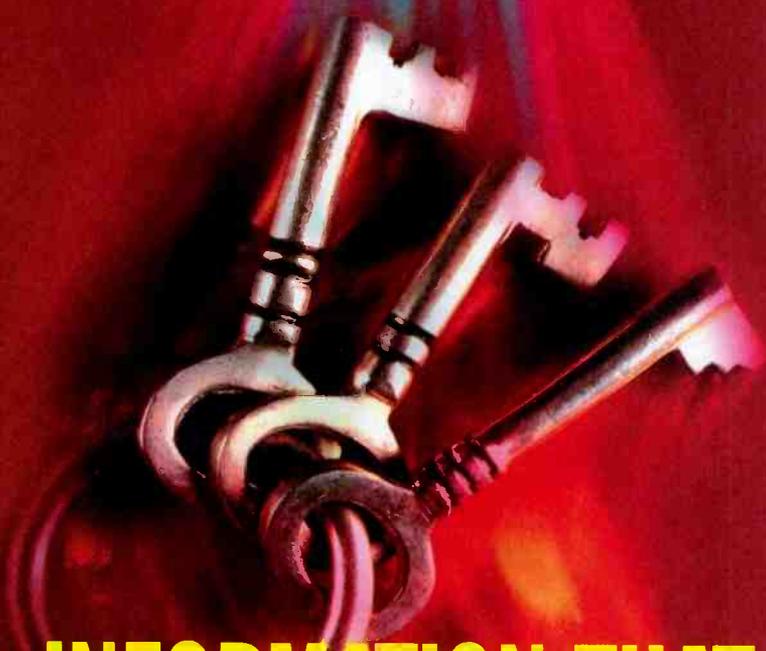
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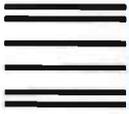
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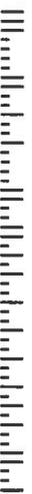
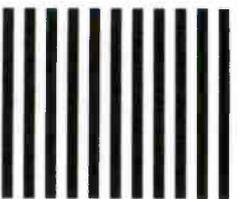
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MAGAZINES

Regional Titles Focus on Tourism at Home

BY LORI LEFEVRE

As tourism slows throughout the country in the wake of the Sept. 11 terrorist attacks, city magazines are developing programs to help local tourism advertisers reach people within their own backyards, as well as bolster their weakened bottom lines.

Tourism advertisers have already started to rethink their plans. "Just like many hotels, we are going to concentrate on reaching people within driving distance," said Peter O'Colmain, regional vp and general manager of the Regent Beverly Wilshire, a Four Seasons Hotel in Los Angeles. "Local magazines could be a good outlet for that."

New York magazine has already responded, both editorially and with advertising. The Primedia-owned weekly created a special editorial package in its Oct. 8 issue urging readers to spend money at local businesses. Publisher Alan Katz and his staff are in the process of meeting with theater, restaurant, city hotel and travel advertisers to discuss possible marketing options.

Initially, *New York* has offered many of these organizations space for nearly nothing, considering it charity and recently setting a special rate for tourism clients. "We're really thinking of ways to get their message out as a group," said Katz. *New York*, which is flat over last year with 2,044 ad pages through its Oct. 8 issue, has seen its advertising growth slow in the last month.

Other publications are also reacting as their cities feel the crunch from the downturn in convention and tourism business.

"We're a part of the community, too, and if there's something we can do to spur spending, we're going to do our part," said Edward Mansfield, advertising director of *Washingtonian*. The independently owned monthly, which is up 1.3 percent with 932 pages through its October issue, decided last week that it would

offer promotional rates (which haven't been set) for hospitality advertisers running in the December and January issues.

San Diego magazine has developed a special ad section for its November issue called "Celebrate San Diego." The monthly has gotten nibbles from local restaurants and tourist spots, including Cafe Sevilla, Bazaar del Mundo and the Restaurant Events Association.

Similarly, in San Francisco, which has already been struggling due to fallout from the collapse of the dot-

com industry, the Bay Area's regional magazine has been working closely with the local tourism bureau. *San Francisco* will postpone its ad section on the city until December to accommodate more advertisers. In addition, it will give the bureau, as well as other first-time hospitality advertisers, a 12-time frequency discount, which translates roughly to a 13.5 percent discount off of its open rate of \$14,580. The magazine, which is flat in revenue and up slightly in pages through November, rarely offers discounts much beyond a rate it would give to a three-time advertiser, said publisher Steven Dinkelspiel. It has also given two pages free in its November issue to the Union Square Association, which represents downtown merchants.

Even *Los Angeles*, which has a policy against discounting its rate card, will create added-value programs, including special advertising sections, for tourism advertisers. The title plans to write "advertorials" about local destinations. Also, it is working with the L.A. Convention and Visitors' Bureau to develop a program promoting area restaurants called "Dine LA," which will include promotional events and in-book ads. "[Advertisers] have the best opportunity to offset tourist dollars lost by aggressively going after local dollars," explained Liz Miller, publisher of the Emmis Publishing title.

Metrocorp's *Philadelphia* magazine is working on a special section on local hotels for its December issue. Advertisers will be rewarded with a 50 percent discount off the rate card. Sibling publication *Boston* magazine won't be creating a custom section but is offering tourism advertisers a free ad page if they buy two pages over the next three months.

"It's really a win-win situation," explained David Lipson, president of regional magazine company Metrocorp and publisher of *Philadelphia*. "We're getting advertisers we wouldn't normally have gotten because they've never really had a need to reach people within driving distance, and they are getting to reach this audience for a highly discounted price."

ST. LOUIS TV STATIONS

Sinclair Scratches ABC Affiliate's Local News

BY JEREMY MURPHY

St. Louis TV viewers now have one less choice for local news. Sinclair Broadcasting's ABC affiliate KDNL shut down its entire local news department on Sept. 28 after years of dismal ratings and increasing costs.

"We closed it because the increasingly competitive landscape in the market made it extremely difficult to operate a competitive news department," said Tom Tipton, vp/general manager of KDNL.

Close to 50 people will lose their jobs when the station ceases local news coverage on Oct. 12. KDNL produces only two half hours of local news a night—5 p.m. and 10 p.m. And yet it has never been able to make a



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- ESPN.com
- Monday Night Countdown
- ABC's College Football
- Sidelines
- NFL Wildcard Playoffs on ABC
- ESPN GamePlan
- NFL Films Presents
- ESPN Bowl Week
- NFL 2Night
- Heisman Award Presentation
- AFC-NFC Pro Bowl on ABC
- Rites of Autumn
- NFL Match-Up
- College Football Thursday

dent in the competition. Gannett's NBC affiliate KSDK has been the news leader in the market for years, followed closely by Belo's CBS affiliate KMOV. News Corp.-owned Fox station KTVI has made ratings gains producing an earlier 9 p.m. local newscast. Compounding KDNL's troubles is the fact that it has a UHF signal, as opposed to its competitors' VHF signals.

"KDNL has had a lot of trouble with their signal in this market," said Marci Fine, associate media director for Adamson, Inc., a St. Louis-based media buyer. "It's not a strong signal, and there are pockets they don't even reach."

KDNL, which signed on as an ABC affiliate in 1995 after the Fox-New World merger stripped it of its Fox affiliation, was a late-comer to the local news race. When it became an ABC affiliate six years ago, the station started a local news operation, but it has never been able to lure many viewers. "They don't have a strong following," Fine said.

An average of 50,000 viewers—only seven percent of the market population—watch KDNL's 10 p.m. news, according to Nielsen Media Research. The station is generally thought to be one of the country's weakest ABC affiliates. In fact, a bad transmitter often knocked the station off air, even during ABC's *Monday Night Football*. KSDK, on the other hand, is one of the strongest NBC affiliates in the country, according to media buyers, while KMOV was the country's most watched CBS affiliate last May.

Tipton, who has not decided what to put on in place of local news, doesn't expect any kind of backlash from market media buyers. "I think they understand why the decision was made," he explained. "I'm sure they're disappointed, as are we, but I think they understand."

ABC representative Julie Hoover had no comment, except to say "we regret their decision." KDNL becomes one of the only top 25 Big Four affiliates to go without a local news operation. WWJ, CBS' Detroit owned-and-operated station, still does not have its own local news department.

Earlier this year, Sinclair moved to scrap the local news department of WTWC, its NBC affiliate in Tallahassee, Fla. Like most pure-play broadcasters, Sinclair has also encountered rough economic waters recently. The ad slowdown continues to hamper its performance. And the company, which owns 62 TV stations, was forced to refinance \$1.75 billion of debt.

OUTDOOR

Advertising Goes Underground in Philly, Atlanta



Submedia ad displays, like the above demo, use the subway's motion to animate the message.

Philadelphia subway riders were treated last week to a new type of outdoor ad that turns the view of a dark subway tunnel into 20- to 30-second motion pictures.

The computer-generated ads depicting pouring water with the tagline, "Treat yourself every day," are created by New York-based Submedia and are part of a three-month test of the new medium by Coca-Cola's bottled-water brand, Dasani. The first Dasani animated ad launched in the Atlanta MARTA system two weeks ago.

"We saw it as an innovative and breakthrough way to advertise to a captive audience," said Jennifer Jacobs, advertising manager for Coca-Cola's Dasani brand. It is also the first time the company has used an out-of-home medium for Dasani. The movement of the train brings a long set of sequential images to life. Each individual image is slipped into pre-set aluminum and steel frames, which vary in length. In Atlanta, where the train moves at 35 mph, 950 feet of images produces a 20-second ad. In the Philadelphia subway system, which travels at 20 mph, 450 feet of frames produces a 15-second ad.

Developed by Joshua Spodek, a Columbia University physicist turned president/CEO of Submedia, and his co-founder Matt Gross, the company sells the space to transit systems, which then offer their underground space to advertisers for \$35,000 to \$250,000 a month, depending on the ridership of the system. The MARTA system could support about 20 such animated ads. In New York, there could be hundreds, Spodek said. —Katy Bachman

ATLANTA RADIO STATIONS

Radio One Goes Gospel

Radio One's Sept. 21 launch of The End, an Active Rock format on its newest and fourth station in Atlanta, will be short-lived. In the next few weeks, the station's frequency, 107.9, will be the new home of Urban Hip Hop, WHTA-FM. The 97.5 frequency will then be programmed with Gospel, one of the few Gospel stations in the country on the FM band and the first Gospel FM in a major market.

The younger-skewing WHTA was up in the Summer ratings to a 4.4 from a 3.5 share. But despite a strong 7.5 share among its 18-34 target demographic, it still lags significantly behind the Urban leader in the market, Infinity Broadcasting's WVEE-FM, which has a 15.7 share.

"We'll be able to gain more listeners when we increase coverage with the new [107.9] signal," said Wayne Brown, vp and

regional manager for Radio One.

Programming for the new Gospel station on 97.5 will be modeled after WNNL-FM, Radio One's highly successful Gospel station in Raleigh, N.C. Ranked sixth in the market, with a 5.4 overall share, WNNL scored third in the market among adults 25-54.

Radio One's simulcast of Smooth Jazz on WJZZ-FM (107.5) and on 102.5 is also due for a split in the next 30 days. The company is currently determining what the new format will be to fit into its strategy to "super-serve the African American community," said Brown. As for the ill-fated Rock experiment, Brown said: "We thought there was a niche there."

In the near term, Radio One's advertising could take a hit. "With WVEE strong in every daypart and [Cox Radio's] WALR-FM, the No. 2 Urban station in the market, I'll wait and see how it shakes out," said Elaine Pearson, the Atlanta media buyer for The Media Edge. —KB

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WHERE "THE CATCH" WAS CAUGHT, WHERE A DYNASTY WAS BUILT.
I GO TO CANDLESTICK.
I GO TO ESPN.COM

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Market Profile

BY EILEEN DAVIS HUDSON



MICHELE AND TOM GRIMM/KLOS ANGELES CONVENTION AND VISITORS BUREAU

Los Angeles

AN INCREASINGLY FRAGMENTED AUDIENCE FOR LOCAL TELEVISION NEWS HAS SHAKEN up the Los Angeles media business this year. There are now seven TV stations broadcasting regularly scheduled newscasts in the country's second-largest market, a proliferation of news programming that has

caused major headaches for the market's two longtime news leaders, NBC's owned-and-operated KNBC-TV and ABC O&O KABC.

In last May's sweeps, both KNBC and KABC suffered significant news ratings losses, while CBS O&O KCBS, which has trailed in the market for years, enjoyed strong gains. At 6 p.m., KNBC plummeted to a 4.1 rating/9 share in households, down 28 percent in ratings and 18 percent in share from May 2000. KABC posted a 5.8/12, off 8 percent in both ratings and share. Meanwhile, KCBS gained 54 percent in ratings and 33 percent in share, to an average 2.0/4.

Paula Madison, the former news director of WNBC-TV in New York who took over as president/general manager of KNBC last November, is dramatically remaking the outlet, installing

new anchor lineups and moving toward more substantive coverage. Madison has largely done away with freeway chases (a staple of local TV news in L.A.) and grisly crime coverage in favor of segments on topics such as California's energy crisis, education, health-care and politics.

Last week, Madison tapped Kim Godwin, previously vp of news operations for the NBC

station group, as vp/news director of KNBC. Godwin replaced Nancy Bauer-Gonzales, who resigned from KNBC in August following disagreements with Madison and recently joined KCAL-TV, Young Broadcasting's Independent outlet in L.A., as news director.

KABC is the leader in most local-news time periods, but KNBC won at 11 p.m. in households in the most recent sweeps (July), according to Nielsen Media Research (see Nielsen chart on page 20). KABC and KNBC are the only two stations in the market that program news at 4 p.m., although KNBC has said it will cancel its 4 p.m. news in fall 2002 because of lackluster ratings and replace it with the new syndicated talk show *Dr. Phil*.

According to BIA Financial Network, KABC generated the highest total ad revenue in 2000 at \$290 million, slightly above KNBC's \$281.8 million. The No. 3 biller in the market is News Corp.'s Fox O&O KTTV, which took in \$215.6 million in 2000, according to BIA. In July, Fox also took control of L.A. UPN affiliate KCOP-TV, following News Corp.'s acquisition of former KCOP parent Chris-Craft Industries. News Corp. has said it will combine the ad sales staffs of the two stations; the company has not disclosed its plans for the outlets' news operations. KCOP produces an hour-long 10 p.m. news that competes against newscasts on KTTV and KTLA-TV, Tribune Co.'s WB affiliate. David Boylan, gm of KTTV, is now also gm of KCOP.

David Woodcock, formerly gm of KCOP, recently moved over to KCBS in the same position. Woodcock replaced John Severino, who retired. Despite its recent ratings gains, KCBS continues to trail most of its competitors in evening- and late-news time periods by a wide margin. The station has made two significant talent hires this year, wooing Harold Greene, an 18-year veteran of KABC, and

Kent Shocknek, an 18-year veteran of KNBC. Greene co-anchors KCBS' 5 and 11 p.m. newscasts, while Shocknek co-hosts the station's 5-7 a.m. morning news.

KCBS' 5 p.m. news has enjoyed a ratings lift from its syndicated *Judge Judy* lead-in at 4 p.m. The court show, added last September, has been the only program in the market to register ratings gains at 4 p.m.

Over at Tribune's KTLA, the

NIELSEN MONITOR-PLUS

AD SPENDING BY MEDIA / LOS ANGELES

	Jan.-Dec. 1999	Jan.-Dec. 2000
Spot TV	\$1,384,056,800	\$1,590,869,853
Local Newspaper	\$948,761,480	\$933,893,660
Spot Radio	\$561,801,670	\$650,142,500
Outdoor	\$104,968,562	\$121,323,859
FSI Coupon*	\$31,168,370	\$31,986,060
Local Magazine	\$28,107,140	\$27,295,630
Local Sunday Supplement	\$582,350	\$488,840
Total	\$3,059,446,372	\$3,356,000,402

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Market Profile

station's 5-7 a.m. morning news program in July regained the top spot in the ratings from KTTV's *Good Day L.A.*, which had overtaken KTLA in July 2000.

As the owner of both KTLA and the *Los Angeles Times*, the market's largest newspaper, Tribune Co. is busy maximizing its synergies in L.A. On Oct. 31, the media giant plans to turn on TV cameras in the newsroom of the *Times*, enabling the paper's reporters to appear live on KTLA's newscasts to provide analysis and promote stories they are working on.

The demographics of Los Angeles have changed dramatically over the past two decades. Nearly 7 million Hispanics, or 20 percent of all U.S. Hispanics, live in L.A., making it the largest Spanish-language market in the country. The market is projected to become 50 percent Hispanic within the next 10 years. According to Scarborough Research, Hispanics make up 36 percent of the market, although other estimates put it at closer to 40 percent.

Many media outlets target this powerful and growing segment of the population. The L.A. market has five Spanish-language TV stations, more than two dozen Spanish-language radio stations and 17 Hispanic newspapers.

KMEX-TV, the flagship of the Los Angeles-based Univision network, is the top-rated Spanish-language station in the country. KMEX's 6 p.m. newscast ranks third in household ratings (behind KABC and KNBC) and is tops "across the board" among the key demos adults 18-34, 18-49, 25-49 and 25-54, says Patricia Ramos, a KMEX representative.

Telemundo Group O&O KVEA-TV is the No. 2 Spanish-language outlet in the market, averaging a 3 sign-on-to-sign-off to KMEX's 7, according to Nielsen Media Research.

Earlier this year, both Univision and Telemundo moved to extend their reach by acquiring additional stations in the market. Univision acquired KHSC-TV (Channel 46), previously a Home Shopping Network affiliate, and Telemundo picked up former Independent KWHY-TV (Channel 22).

According to Scarborough Research (see chart above), only 67 percent of the market's residents are connected to cable TV, below the national average of 73 percent for the country's top 50 markets.

Local interconnect Adlink serves all 3.3 million cable homes in the market. Thirteen-year-old Adlink, the country's first interconnect, is owned by the major operators Adelphia Cable, AOL Time Warner, AT&T Broadband, Charter Communications and Cox Cable, all of which have cable

SCARBOROUGH PROFILE

Comparison of Los Angeles

TO THE TOP 50 MARKET AVERAGE

	Top 50 Market Average %	Los Angeles Composition %	Los Angeles Index
DEMOGRAPHICS			
Age 18-34	31	36	114
Age 35-54	41	40	99
Age 55+	28	24	86
HHI \$75,000+	25	26	105
College Graduate	12	11	90
Any Postgraduate Work	10	10	97
Professional/Managerial	23	22	96
African American	13	8	64
Hispanic	12	36	290
MEDIA USAGE - AVERAGE AUDIENCES*			
Read Any Daily Newspaper	53	49	93
Read Any Sunday Newspaper	64	58	91
Total Radio Morning Drive M-F	22	25	111
Total Radio Evening Drive M-F	18	20	109
Total TV Early Evening M-F	30	27	92
Total TV Prime Time M-Sun	39	35	91
Total Cable Prime Time M-Sun	13	9	68
MEDIA USAGE - CUME AUDIENCES**			
Read Any Daily Newspaper	72	68	95
Read Any Sunday Newspaper	77	72	94
Total Radio Morning Drive M-F	75	77	102
Total Radio Evening Drive M-F	73	75	102
Total TV Early Evening M-F	71	71	100
Total TV Prime Time M-Sun	91	91	101
Total Cable Prime Time M-Sun	58	48	83
MEDIA USAGE - OTHER			
Access Internet/WWW	58	60	103
HOME TECHNOLOGY			
Own a Personal Computer	64	61	96
Shop Using Online Services/Internet	27	24	91
Connected to Cable	73	67	92
Connected to Satellite/Microwave Dish	14	13	91

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

Source: 2000 Scarborough Research Top 50 Market Report (August 1999-September 2000)

systems in the market.

Adlink inserts local ads on 44 cable networks, up from 40 a year ago. "Our combined share of viewing for those 44 networks in July was 41 percent, up from 34 percent a year ago," says Hank Oster, Adlink executive vp and gm. More than a third of TV viewing in Los Angeles is via cable, Oster says.

Adlink offers advertisers targeted programs including Adcopy, through which an advertiser can run different spots targeting specific segments of viewers simultaneously across several cable networks. Adlink also has a dedicated sales force for reaching Hispanic viewers on cable.

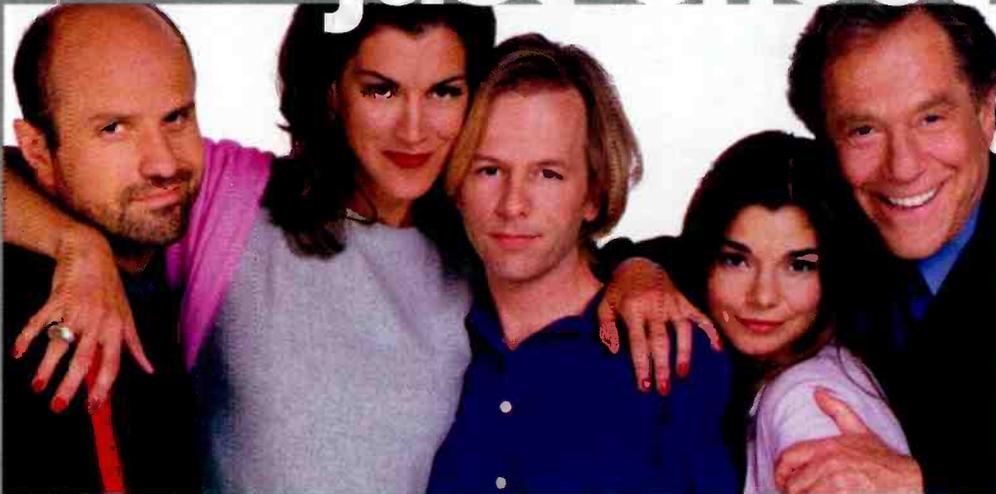
The L.A. market's myriad daily newspapers and other print vehicles offer further evidence of the demographic fragmentation of

this expansive DMA. Because of the splintered audience, no single daily newspaper can provide advertisers total coverage of the market.

Tribune's *Los Angeles Times* has the broadest and largest reach, with circulation of 1,058,494 daily and 1,391,343 on Sunday. The daily circ figure declined 4.8 percent for the six months ended March 31 compared to the same period a year earlier, according to the Audit Bureau of Circulations; Sunday circ advanced slightly. The *Times*' Sunday edition includes the *Los Angeles Times Sunday Magazine*, one of the few remaining Sunday mag sections published by a daily newspaper.

The *Times* has a distribution partnership with the market's leading Spanish-language newspaper, locally owned *La Opinión*, which has circulation of 118,080 daily and 71,495 on

just shoot me!



everybody loves raymond

look for ktla's
syndicated
success to
continue this
fall.



ktla syndication debuts NSI rank

	adults 18-34	adults 18-49	adults 25-54
Cheers Nov. '87/11p	#1	#1	#1
Seinfeld Nov. '95/7:30p	#2	#2	#2
Friends Nov. '98/7p	#1	#1	#1

Source: Los Angeles NSI VIP Reports. Program ranks based on KTLA performance compared to other Los Angeles entertainment programming within designated half-hour time period.

Thank you for your advertiser support!

television los angeles



Market Profile

Sunday. Reflecting the market's rapidly growing Hispanic population, *La Opinión's* daily circ jumped nearly 10 percent in the six months ended last March compared to a year earlier, and Sunday circ increased 6.6 percent.

The second-largest daily in Los Angeles County is Denver-based MediaNews Group's *Los Angeles Daily News*, which has a daily circ of 190,010, a decline of 5.4 percent for the six months ended in March and Sunday circ of 200,419, a decline of 5.7 percent.

In July, the *Daily News* welcomed new publisher John Schueler, previously publisher of the *Minneapolis Star Tribune*. Before going to Minnesota, Schueler had served as president/COO of the *Orange County Register* in Santa Ana, Calif., part of the L.A. DMA.

The *Daily News* is the largest daily in MediaNews' dozen-paper regional chain, the Los Angeles Newspaper Group. The group, with a total circulation of 600,000, includes the suburban papers the *Pasadena Star News*, *San Gabriel Valley Tribune* and *Long Beach Press-Telegram*.

The *Orange County Register* is the flagship of the Freedom Communications group. The *Register's* daily circ for the six months ended last March was 353,334, down 4.1 percent; Sunday circ was 410,207, a 3.2 percent decline.

Los Angeles magazine, founded in 1960, has gone through several management changes in recent years. In March 2000, Emmis Communications acquired the title from Walt Disney Co., following a fierce bidding war with Primedia. Emmis, which publishes several other regional magazines, including *Texas Monthly* and *Atlanta*, also owns two FM radio stations in L.A.

In May 2000, Emmis hired Kit Rachlis, previously Page One editor of the *L.A. Times*, as editor of *Los Angeles*. This past January, Rachlis introduced a complete graphic redesign of the magazine, along with a sharpened editorial focus on topics pertaining to L.A.

LA Weekly, a free-circulation alternative paper owned by the publisher of New York's *Village Voice*, targets young readers in the market.

In radio, Clear Channel Communications and Viacom's Infinity Broadcasting are the dominant owners in the market. With its nine stations, Clear Channel has a combined listener share of 22 and \$284.7 million in ad revenue, 30.9 percent of the market's total (see *Radio Ownership chart at right*). Infinity is close behind with a combined 20.2 listener share for its seven outlets and \$284.2 million in billings, 30.8 percent of the total market.

NIELSEN RATINGS / LOS ANGELES

EVENING AND LATE-NEWS DAYPARTS, WEEKDAYS

Evening News

Time	Network	Station	Rating	Share
4-5 p.m.	ABC	KABC	5.4	14
	NBC	KNBC	3.0	8
	ABC	KABC	4.8	11
5-5:30 p.m.	NBC	KNBC	3.7	8
	WB	KTLA*	3.1	7
	Fox	KTTV*	2.4	5
	CBS	KCBS	2.2	5
	Pax	KPXN*	0.4	1
	ABC	KABC	4.8	11
5:30-6 p.m.	NBC	KNBC	3.7	8
	WB	KTLA*	3.1	7
	Fox	KTTV*	2.4	5
	CBS	KCBS	2.2	5
	Pax	KPXN*	0.4	1
	ABC	KABC	5.8	12
6-6:30 p.m.	NBC	KNBC	4.3	9
	Univision	KMEX	3.3	7
	WB	KTLA*	3.2	6
	UPN	KCOP*	2.9	6
	Fox	KTTV*	2.3	5
	CBS	KCBS	2.2	5
	Telemundo	KVEA	1.5	3
	Pax	KPXN*	0.5	1

Late News

10-11 p.m.	WB	KTLA	3.2	6
	Fox	KTTV	3.1	5
	UPN	KCOP	2.1	4
11-11:30 p.m.	NBC	KNBC	6.8	15
	ABC	KABC	5.6	12
	Univision	KMEX	3.9	8
	CBS	KCBS	3.5	8
	Fox	KTTV*	2.3	5
	WB	KTLA*	2.2	5
	UPN	KCOP*	2.0	4
	Telemundo	KVEA	1.0	2
Pax	KPXN*	0.8	2	

*Non-news programming Source: Nielsen Media Research, July 2001

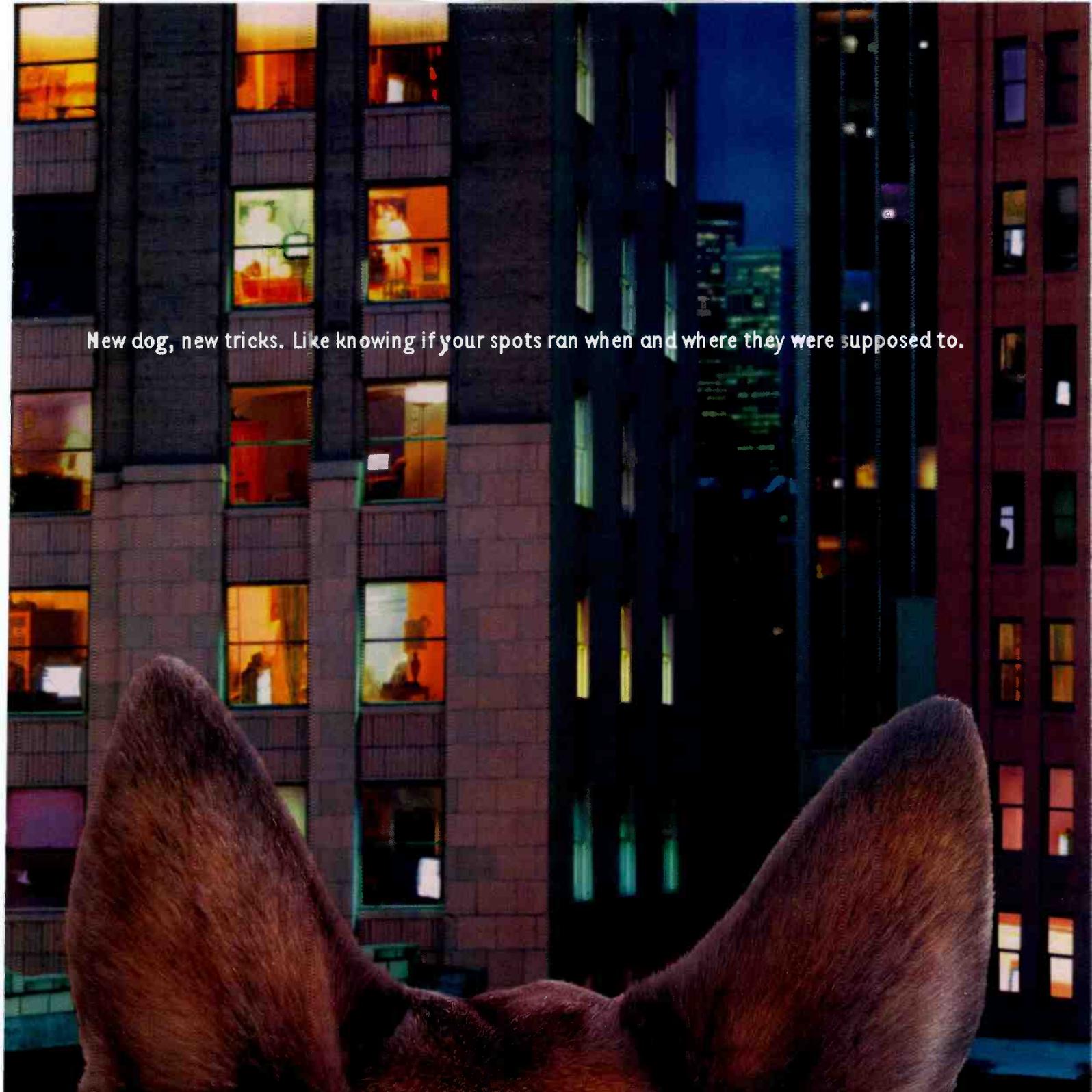
RADIO OWNERSHIP

OWNER	STATIONS	Avg. Qtr.-Hour Share	Revenue (in millions)	Share of Total
Clear Channel Communications	3 AM, 6 FM	22.0	\$284.7	30.9%
Infinity Broadcasting	2 AM, 5 FM	20.2	\$284.2	30.8%
Hispanic Broadcasting	3 FM	9.6	\$71.1	7.7%
Emmis Communications	2 FM	7.1	\$61.6	6.7%
ABC Radio	2 AM, 1 FM	4.9	\$59.5	6.5%
Radio One	2 FM	4.1	\$43.1	4.7%
Liberman Broadcasting	2 AM, 1 FM	3.5	\$23.0	2.5%
Spanish Broadcasting	1 FM	3.0	\$16.1	1.7%
Entravision Communications	2 FM	1.2	\$12.6	1.4%
Mt. Wilson FM	1 FM	1.2	\$9.6	1.0%

Includes only stations with significant registration in Arbitron diary returns and licensed in Los Angeles or immediate area. Ratings from Arbitron Spring 2001 book; revenue and owner information provided by BIA Financial Network.

Third-ranked Hispanic Broadcasting boasts the market's top-rated station, KSCA-FM, which plays a Ranchera format. Other ethnic-targeted stations also attract strong listenership, including Emmis Communica-

tions' Urban/Contemporary Hit Radio outlet KPWR-FM and its competitor, Urban-formatted KKBT-FM, owned by Radio One. Another top performer is Clear Channel's Top 40 KIIS-FM, the highest-billing



New dog, new tricks. Like knowing if your spots ran when and where they were supposed to.

ConfirMedia

For the first time ever, you can precisely track and verify your TV and radio buys the very next day. Introducing ConfirMedia, a revolutionary new broadcast verification system from Verance, a proven innovator of global media information tools and services. ConfirMedia serves as your watch dog, always there to let you know if the right spots ran at the right times in the right places. With accurate, comprehensive, next-morning reports of precisely when and where each spot aired. Or didn't air. This means you'll be able to quickly correct any errors and secure makegoods in-flight. To learn more about how easy it is to leverage this powerful new media information tool, simply call us toll-free at 1-866-VERANCE or visit us at www.confirmedia.com.

 Verance

Market Profile

NEWSPAPERS: THE ABCS

station in the market at \$65.5 million, according to BIA.

Infinity's roster is led by KROQ-FM, an Alternative property. Infinity also owns the market's only FM New Adult Contemporary/Jazz station, KTWV-FM. Privately held Mt. Wilson FM operates KJAZ-AM, a low-rated AM Jazz outlet based in Beverly Hills. The station recently improved the strength of its signal. Mt Wilson also owns the market's lone Classical station, KMZT-FM.

In May, Spanish Broadcasting acquired the 96.3 frequency of KFSG-FM for \$250 million. SB changed the outlet's call letters to KXOL-FM and its format to Spanish Adult Contemporary/Mexican.

The Christian-formatted KFSG-FM is now licensed out of Redondo Beach, Calif., and is at 93.5 on the dial, replacing Spanish Broadcasting's KMJR-FM, which had featured Korean programming. (Several other stations continue to target the market's sizeable Asian population.)

In another recent change, Clear Channel reformatted its KCMG-FM, flipping it from R&B Oldies to Hot Adult Contemporary, with the new call letters KHHT-FM.

Thanks in large part to its unparalleled freeway system, Los Angeles is the No. 1 out-of-home ad market in the country. Prime outdoor locations include the Sunset Strip, West Los Angeles, Hollywood, West Hollywood, Century City, Santa Monica, Venice, the Ventura Corridor and the area around the Los Angeles International Airport, known as LAX.

Los Angeles' strong outdoor market includes a number of players. Viacom's decision to merge its out-of-home companies Infinity Outdoor (now Viacom Outdoor) and TDI solidified the company's presence in the mar-

	Daily Circulation	Sunday Circulation	Daily Market Penetration	Sunday Market Penetration
Los Angeles County: 3,175,119 Households				
<i>Torrance Daily Breeze</i>	84,321	83,805	2.7%	2.6%
<i>Press-Telegram</i> (Long Beach)	92,336	104,560	2.9%	3.3%
<i>La Opinión</i>	81,762	49,747	2.6%	1.6%
<i>Los Angeles Times</i>	711,134	869,481	22.4%	27.4%
<i>Pasadena Star-News</i>	38,873	38,745	1.2%	1.2%
<i>Los Angeles Daily News</i>	178,936	188,508	5.6%	5.9%
<i>San Gabriel Valley Tribune</i>	52,608	54,739	1.7%	1.7%
Riverside County: 517,975 Households				
<i>North County Times</i>	14,339	14,202	2.8%	2.7%
<i>Los Angeles Times</i>	36,351	53,211	7.0%	10.3%
<i>Palm Springs Desert Sun</i>	49,849	51,962	9.6%	10.0%
<i>The (Riverside) Press-Enterprise</i>	155,716	162,563	30.1%	31.4%
<i>Orange County Register</i>	5,482	7,564	1.1%	1.5%
Santa Barbara County: 140,615 Households				
<i>Lompoc Record</i>	7,621	7,799	5.4%	5.5%
<i>Los Angeles Times</i>	13,175	14,258	9.4%	10.1%
<i>Santa Barbara Press News</i>	44,339	47,550	31.5%	33.9%
<i>Santa Maria Times</i>	17,529	18,507	12.5%	13.2%
Ventura County: 244,710 Households				
<i>La Opinión</i>	2,424	1,523	1.0%	0.6%
<i>Los Angeles Times</i>	46,900	61,187	19.2%	25.0%
<i>Los Angeles Daily News</i>	19,281	22,322	7.9%	9.1%
<i>Ventura County Star</i>	93,110	106,151	38.0%	43.4%
Orange County: 955,454 Households				
<i>Los Angeles Times</i>	192,043	256,454	20.1%	26.8%
<i>Orange County Register</i>	338,126	390,841	35.4%	40.9%

Source: Audit Bureau of Circulations

ket. While TDI controls advertising on Los Angeles city buses, Viacom Outdoor offers 1,475 permanent and rotary 14-by-48-ft. bulletins, just less than 3,000 posters, 17 vinyl-wrapped building walls and 3,500 bus shelter positions. "Our inventory with posters and transit combined gives us a pretty good reach throughout the metro area," says Mechele Kern, local sales manager for Viacom Outdoor.

Clear Channel Outdoor also has a significant presence in the market. Clear Channel dominates the 30-sheet poster-panel segment of the business; the company's offerings also include 14-by-48-ft. bulletins, walls, kiosks and LEDs.

While Clear Channel and Viacom have the most outdoor inventory in the market, several other players have held their ground by carving out niches. L.A.-based Van Wagner Outdoor offers a jumbo video board along the Sunset Strip that can be shared by up to five advertisers at a time, at a cost

of \$18,000 per month per advertiser. Van Wagner also controls about 325 bulletin facings in the market.

Vista Media, a division of Entravision Communications, dominates the eight-sheet poster segment of the outdoor business. Vista's 5,500 eight-sheets are situated on surface streets in the urban areas of Los Angeles County.

Regency Outdoor Advertising offers bulletins and some wall positions and has a dominant presence along the Sunset Strip. Regency also has a strong presence in the LAX area. Summit Media, based in Santa Monica, also operates several bulletin positions.

Earlier this year, E-Caps North America, based in Winnipeg, Canada, introduced a new outdoor vehicle to the market. The company's "E-caps" are 17-inch automobile wheel covers that remain stationary while a car is in motion. The caps were fitted to taxicabs owned by City Cab of Los Angeles, the first company in the U.S. to outfit its fleet with the wheel covers. City Cab started out with 50 of its vehicles featuring the branded wheels; the company has plans to increase the total to 200. —with Jeremy Murphy ■

RADIO LISTENERSHIP

STATION	FORMAT	Avg. Qtr.-Hour Share	
		Morning Drive, 12+	Evening Drive, 12+
KSCA-FM	Ranchera	8.2	2.6
KKBT-FM	Urban	4.8	3.5
KLVE-FM	Variety/Spanish	4.6	3.7
KROQ-FM	Alternative	4.2	5.1
KHIS-FM	Top 40	4.2	4.6
KNX-AM	News	3.8	2.0
KLSX-FM	Talk	3.5	2.9
KPWR-FM	Urban/Contemporary Hit Radio	3.4	4.9
KFI-AM	Talk	3.4	2.5
KLOS-FM	Album-Oriented Rock	3.3	2.6

Source: Arbitron Winter 2001 Radio Market Report

HISPANIC LIFESTYLES

A Marketing Opportunity Update

what's harder than **CHOOSING** an Ad Agency?

choosing a Hispanic Ad Agency

You don't want to be a conejillo de Indias (that's guinea pig in Spanish).

To start with, save yourself a ton of time just by looking at the agency's client roster. You know that large companies who believe, and are investing heavily in the profitable Hispanic market, aren't very keen on taking risks. They may have tried more than one Hispanic agency, and if they've stuck to the same one for a long time, that really tells you something.

An agency is its people. In this case, Hispanic people.

You go to a Japanese restaurant and the man preparing your sushi is not Japanese. We've all seen it. Although the sushi may be decent, it's just not the same thing. You want the people that cook up your Hispanic advertising to really know the market, to live it, understand it, and to be able to connect with it. You want the agency team to be as diverse as the market itself. In other words, you don't want no stranger rolling up your burritos.

Independence is a state of mind.

Should you care if your Hispanic agency is an independent shop or part of a large communications group? Sure you should. Being part of an important group means having a wealth of resources, access to an incredible amount of information, and plenty of leverage to negotiate with the media. All this knowledge and power is used to the benefit of your company and your product. The secret is to find an agency that combines the resourcefulness of a large group with the independent thinking and the personal attention you get from a small shop. Not an easy task.

How do you say Creative in Spanish?

Like in any other language: fresh, original, never-seen-before, compelling. But sensitive to the insights that are relevant to Hispanics. Our best advice is: look at the agency's reel like a consumer, not a client. If it bores you, don't touch that agency. Even if they tell you how spectacular the results were. Were they really? See the next point.

You are what you sell.

Any Hispanic agency worth its salt (for margaritas) should be able to show you case-studies and results achieved for their clients. We mean facts and numbers, not a dog and pony show. Not a beautiful piñata that's empty inside. Would you give your hard-earned money to a law firm without any knowledge of their track record? You're hiring their brains, not the designer suits.

Who's paying for this ad?

We thought you'd never ask! It's Lápiz, an Integrated Hispanic Marketing agency. Lápiz is part of Leo Burnett USA, Inc., one of the companies of the Boom3 Group, Inc., a top-tier global advertising and marketing communications organization. Lápiz has been around for 14 years, it's the only Hispanic agency with 5 EFFIE awards. We work with blue-chip clients, and many of them have been with Lápiz for 10 years. Lápiz is a group of independently-minded people from 10 different Latin-American countries, who would be more than happy to show you what they have done for their clients. Doesn't that sound exactly like the kind of Hispanic agency you're looking for? What a coincidence.

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When viewing the Hispanic audience, marketers should be aware of large family sizes.

Family Affair

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The U.S. Hispanic population boom changes everything for marketers who target families with kids.

RESOURCES

In this advertising supplement, research firms ACNielsen, Claritas and Spectra use their specialized, proprietary data to add insight to the U.S. Census 2000 findings on Hispanic Americans.

ACNielsen, a company of VNU N.V., is the world's leading market research firm, offering measurement and analysis of marketplace dynamics, consumer attitudes and behavior, and new and traditional media in more than 100 countries. Clients include leading consumer product manufacturers and retailers, service firms, media and entertainment companies and the Internet community.

For more information about the ACNielsen Hispanic Consumer Panel, contact Sharon Abish at (516) 682-6011 or sabish@acnielsen.com.



Spectra provides manufacturers, retailers, and brokers in the consumer goods industries with consumer segmentation, data integration, and retail intelligence. Spectra strives to deliver "fully integrated Consumer-Centric Marketing solutions" to the CPG industry. Consumer-Centric Marketing (CCM) creates Marketing ROI by measuring the sales volume impact of all consumer directed spending. Spectra, working with many information partners, is assembling a breakthrough set of tools that provide the new century marketer, sales professional, or advertising manager, the means to create unparalleled efficiency in all marketing spending.

For further Spectra information, please visit our website at www.spectramarketing.com, or call Spectra at (877) 253-4657.



Claritas Inc. is regarded as the premier provider of precision marketing solutions including demographic data, customer segmentation systems and other marketing tools to a variety of industries. Financial Services, Retail, Real Estate and Telecommunications are a few industries Claritas serves. It is a division of VNU Marketing Information, Inc.

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Phone: (800) 234-5973,
email: info@claritas.com



Peeling Back The Onion

Marketers get closer to understanding the segment with each layer.

BY **KEN GREENBERG**

When Isabel Valdes came to the United States in 1974, her first trip to a grocery store proved overwhelming and potentially problematic. She saw numerous products that she didn't recognize, including salad dressing. "It looked like 'gomina,' a type of gel I would see people using on their hair back home, so I thought it was some type of hair product," she said. In her native Chile, salad is a popular dish, but dressing is virtually unheard of—oil and vinegar or lemon are more customary toppings. Today, Valdes and her family have become frequent salad dressing users and she's become a much sought-after consultant to companies trying to understand and serve the Hispanic market.

The business community's growing knowledge of the Hispanic market can be likened to peeling an onion. The first layer, recognition as a whole, was peeled for it. The sheer size of the market has grown too large for anyone to miss the significance of this group. Especially with all the news stories this year detailing the figures reported by the Census Bureau, which pegged the Hispanic community as the largest ethnic group in the United States with 34.7 million constituents. Some suggest that the actual number is even higher.

The next layer of understanding was the realization that, despite many cultural similarities, Hispanics residing in various regions of the United States are distinct from each other. Consumers in Los Angeles are different from those in Chicago, who aren't the same as those in New York. This is primarily

soundbites

I was in the grocery store the other day—the bread aisle as I'm a bread fiend. As I make my selection of one loaf of white bread, one loaf of wheat and the obligatory (wife-induced) 12 grain, I hearken back to my days as a child in Mexico and a specific memory of my mother buying toast at the store. It seems strange today that anyone would buy toast. After all, isn't that why we have toasters? What's an extra 60 seconds of effort to make toast out of bread? I think the whole toast thing goes back to when electricity was not available in many parts of Mexico. No electricity, no toaster. No toaster, no toast. No toast? Well, Bimbo (the behemoth multinational bakery) took care of that problem. They started selling toast. Today, most grocery stores in Mexico and many U.S. grocery stores catering to Hispanics still carry toast. My gut tells me that today toast sales are due to nostalgia and tradition, but most ways you slice it, so is Hispanic marketing.

—JOSE VILLASENOR, VICE PRESIDENT, KETCHUM TEXAS

because immigrants from each country tend to cluster in specific geographic areas—such as Mexicans in Southern California or Cubans in Miami—and some Hispanic communities are more acculturated than others because residents migrated to the U.S. earlier. Marketers soon discovered that their product preferences differed as well.

ACNielsen tracks those differences with our Scantrack Ethnic Service, which compares product purchasing in large supermarkets located in metros with heavy concentrations of Hispanic residents—Los Angeles, Miami, New York, Chicago, Houston and

San Antonio—to those in the general market. Some products are big sellers for the Hispanic community across all six markets. Lard, for instance, because it's used in preparing traditional foods such as Mexican enchiladas and tamales. But each market also shows many unique product preferences.

Such as for shortening and oil purchases. Overall, the category indexes high in the Hispanic community in all six cities monitored by Scantrack, especially Houston, where the index is 184. But as we drill into

the category, which is comprised of cooking sprays, salad and cooking oil, olive oil, shortening and lard, we see several important distinctions and preferences.

While cooking sprays tend to under-index across all six markets, lard over-indexes in each. Olive oil, on the other hand, only indexes high with the Hispanic community in Miami, home to immigrants from Puerto Rico, Cuba and other Caribbean islands. This is because the Spanish brought olive oil to the

Hispanic Shopping Index for Six Major Markets

To determine the dollar volume index, ACNielsen takes the total dollar sales of Hispanic-area stores to determine what percentage of the total a specific item comprises, then compares that figure with the figure for the general market. For example, if three-tenths of a percent of sales comes from table salt in the Hispanic area stores compared with two-tenths of a percent in the general market, Hispanic-area stores would have an index of 150.

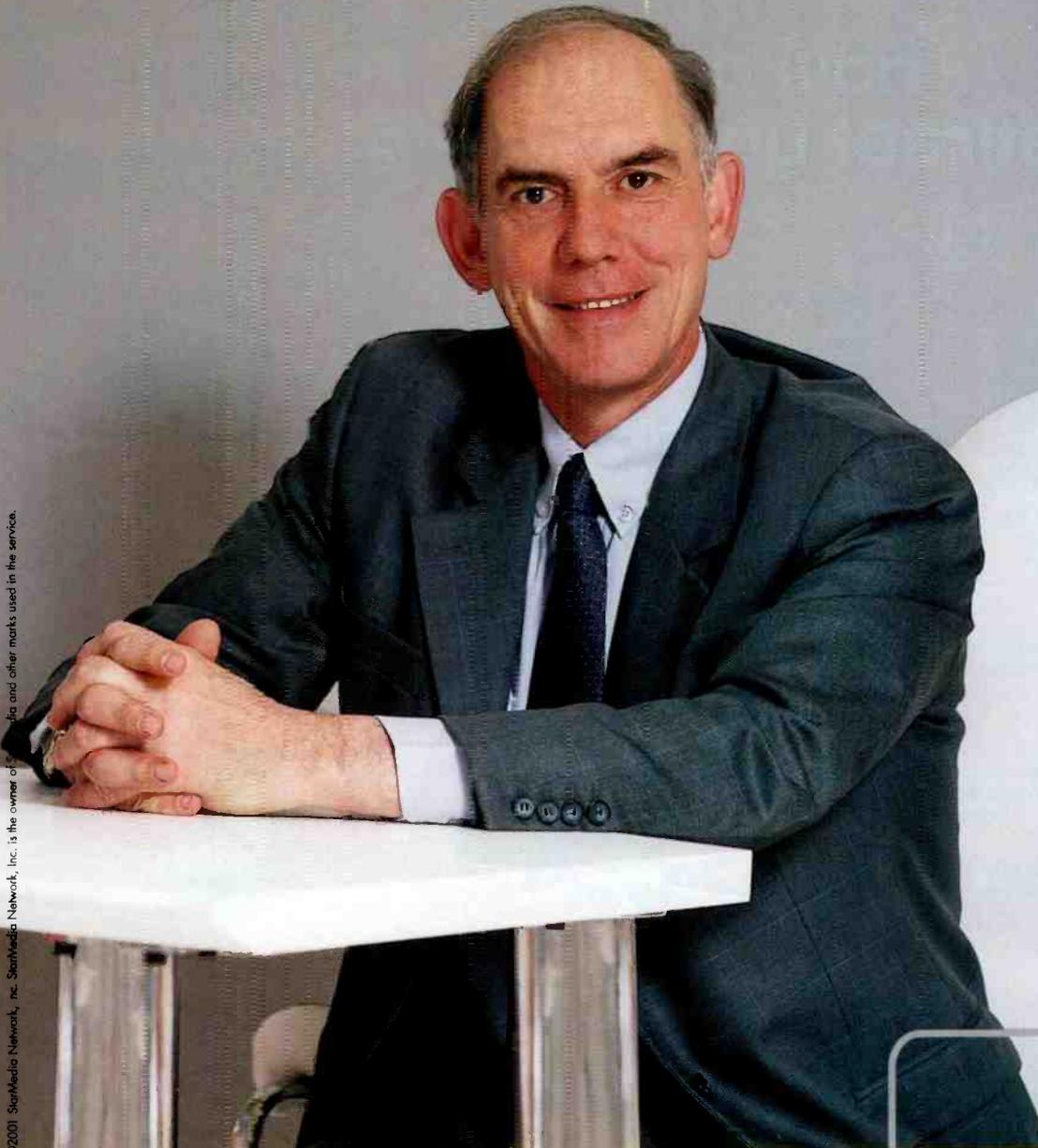
	DOLLAR VOLUME INDEX					
	Chicago	Houston	Los Angeles	Miami	New York	San Antonio
Total Shortening/Oil	117	184	150	136	144	159
Cooking Sprays	68	46	43	68	65	74
Salad/Cooking Oil	160	227	189	137	229	178
Olive Oil	75	72	56	159	94	56
Shortening	12	23	47	240	90	206
Lard	270	521	245	205	505	302

Source: ACNielsen

L'ORÉAL



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Olivier Richard
General Manager,
L'Oréal Mexico

"L'Oréal provides the most advanced technologies to all of its audiences regardless of frontiers or cultures. Thus joining with StarMedia, a global leader in Internet technologies, is important for our communication strategy."

The idea is to create an on-line tool where thousands of Spanish- and Portuguese-speaking women can find information on beauty and other topics relevant to their lives. A place where they can be heard and advised. Where they can have a one on one relationship with L'Oréal and its products.

The result: Cadamujer.com / Viamulher.com. The first on-line destination entirely dedicated to Spanish- and Portuguese-speaking women. The powerful results generated by this pioneering venture demonstrate what two leading companies can accomplish together, taking full advantage of everything that the Internet has to offer.

Cadamujer.com is yet another example of how StarMedia can help advertisers connect with their target audience. To learn more about our services call us at 1-305-938-3000 or send an email to advertising@starmedia.net
StarMedia, effective solutions on the Internet.

www.starmedia.com

how do you attract your target?

shopping channel



Services especially created for the Hispanic Community.

- **Regalos Sin Fronteras:** Send gifts to Latin America without paying import duties and international shipping.
- **Centro de Idiomas:** Learn Spanish, English or Portuguese.
- **Envíos de Dinero:** A convenient and safe way to send money to Latin America.
- **Terra Mall:** Search and compare prices at more than 2,000 U.S. merchants.
- **Compras USA:** American products available from anywhere in the world.
- **Sabor Hispano:** The place to find authentic Hispanic treats.

An innovative concept on the Internet created exclusively for teenagers.

A virtual world where there's always something for them:
Fashion, Music, Love, Celebrities, Concerts, and more.

A place where you can talk to them in their own language.



teen channel

ice cream patrol



The only bilingual channel designed just for kids, so they can learn while doing what they like best: Playing!

A special, magical place where kids and their parents can have a **one-of-a-kind interactive experience.**

A wonderful, kid-friendly place to learn and have fun at the same time!

Terra offers you the key to successful and cost-effective online advertising

Contact us at 1-888-MYTERRA

Telefonica

with what interests them the most.

Programs aimed to catch the attention of the Hispanic Market. For example:

TerraGol – 1st Hispanic Beach Soccer tournament that allows fans to play their favorite sport while competing for great prizes.

Virtual Soccer Cup – Fans of all ages can play online, allowing them to enjoy the excitement of the game without ever leaving their home.

TerraRock – A hip musical event dedicated to "Rock en Español". Users can be part of a live concert featuring their favorite artists while helping local bands realize their dreams.



Events and promotions



TuMonitor allows our users to access the Internet in a quick and easy way.

With **TuMonitor**, users can track their e-mail accounts, award programs and packages while also accessing a wide array of financial services. They can follow their horoscopes, local weather and much more.

All in a secure fashion and with a single **Terra username and password**.



TuMonitor

with highly targeted channels, services, promotions and events.
or advertising@terra.com

terra



Internet,
más tuyo que nunca.

HISPANIC LIFESTYLES

Peeling Back The Onion

Americas, Valdes explains, and its use is particularly strong in the Caribbean because of that region's ongoing ties to Spain. These findings are helping marketers determine where to offer various products and how to best promote them.

Today, marketers are in the process of peeling back the third layer—they are exploring nuances that exist within the Hispanic community in a given market. Since January 1999, ACNielsen has been running a consumer panel in the Los Angeles area consisting of Hispanic households across the spectrum of language preferences, a proxy for acculturation. For a portion of the 1,500 households, Spanish is either the preferred or only language spoken, other households are bilingual and the rest use English as their preferred tongue. Each segment is represented on the panel according to its size in the population of the four-county Los Angeles area: Spanish only/preferred, 47%; bilingual, 37%; English only/preferred, 16%. Again, when one digs deeper, more telling buying trends emerge.

When shortening/oil purchases are compared, it appears that the category is only slightly more important to Hispanic households—88% purchase the category compared to 79% of non-Hispanic households. But when the data is broken down by language preference, we see that the least acculturated households are a bit more likely to purchase the category than the more acculturated households: 92% vs. 82%.

The difference is even much more dramatic with lard. Only 3% of the most acculturated households purchase it, but more than three times as many Spanish only/preferred households (11%) do. Similar results are observed in many categories. These findings have significant ramifications for the marketing efforts and strategies of manufacturers, both in terms of whom they target with their messages and how they communicate.

The findings also have ramifications for retailers. A separate ACNielsen Homescan study found that the least acculturated Hispanic households in Los Angeles are less likely to have easy access to transportation, making it more difficult to get to large supermarkets. They are therefore more likely to utilize smaller and closer shopping outlets, such as neighborhood bodegas rather than large supermarkets. At least one innovative grocery

retailer is aware of this conundrum—it now offers bus service to deliver Hispanic shoppers to its doorstep.

It is doubtful that many Hispanics are confusing salad dressing with hair gel today. However, data from the ACNielsen Homescan LA Hispanic panel shows that the least acculturated Hispanics are still much less likely to purchase salad dressing than their more acculturated counterparts. And herein lies an important lesson for marketers. It is much easier to learn about and cater to the food preferences recent immigrants brought from their home countries than to educate them about products that sell well to Americans and convince them that they should buy those products as well.

Ken Greenberg is vice president, consumer marketing services, for ACNielsen Homescan, ACNielsen's consumer panel consisting of 67,000 North American households. ACNielsen (<http://acnielsen.com>) is headquartered in Schaumburg, Ill.

Top Five Category Indexes by Geographic Area

SAN ANTONIO		LOS ANGELES	
	Dollar Volume Index		Dollar Volume Index
Toilet Bowl Deodorizers	439	Vitamins/Tonics (Liquid, Powders)	302
Lard	302	Lard	245
Mexican Foods (Canned)	232	Ham (Canned, Refrigerated)	240
Orange Juice (Shelf Stable)	230	Dry Beans	232
Infant Formulas	226	Bouillon	228
CHICAGO		MIAMI	
	Dollar Volume Index		Dollar Volume Index
Malt Liquor	294	Children's Cologne	449
Lard	270	Cooking Wine & Sherry	324
Flea Collars	233	Colognes and Perfumes	263
Glazes	231	Rem. Chilies (Canned Pimentos)	256
Cranberry Juice (Refrigerated)	231	Flaked Soda Crackers	237
HOUSTON		NEW YORK	
	Dollar Volume Index		Dollar Volume Index
Toilet Bowl Deodorizers	577	Children's Cologne	566
Lard	521	Lard	505
Battery Chargers	478	Near Beer	448
Flour(-All Purpose,-Remaining)	465	Deodorant (Cologne Type)	439
Cameras	446	Rem. Packaged Meat (Refrigerated)	407

soundbites

One of the most compelling stories coming from Census 2000 is that of Latino youth. Did you know that one out of every five births in the U.S. today is to a Latina mother? The Latino population skews significantly younger than the mainstream, and a key trend here is "retro-acculturation." Many of these youth are growing up as American as apple pie, watching network TV and rejecting Spanish language influences. But as they enter their teens, they begin to embrace their Hispanic heritage and learn more about their roots. Effectively reaching this burgeoning audience of consumers will be a significant source of volume for many products. We will see more media programming and advertising focused on this group. Right now, Nickelodeon's most popular shows are "Brothers Garcia" and "Dora the Explorer," both produced by Si TV. Showtime offers Latin-themed "Resurrection Blvd." Look for major media conglomerates Disney, Viacom and AOL Time Warner to expand English-language Latino media offerings, through acquisition or start-up. The need to market to this young Latino audience has grown significantly, and thus, ad sales look bright. At Prime Access, we're seeing clients place new priority on Latino marketing programs. Soon 40% of all new consumers will be Latino, either by birth or through immigration. Now is the time to make your marketing commitment.

—HOWARD BUFORD, FOUNDER & PRESIDENT, PRIME ACCESS



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The House That Roared

When viewing the Hispanic audience, marketers should be aware of large family sizes.

BY LINDA JACOBSEN

How important is the Hispanic market in the U.S.? Consider the fact that there are more Hispanics in the U.S. than there are Canadians in Canada and you begin to appreciate the size and potential of this consumer segment. But it's not just their increasing numbers that make Hispanics important.

"Hispanic culture has permeated the U.S. and is transforming our society. If you look in the average refrigerator in the U.S. today, you will find a jar of salsa next to the bottle of ketchup," explains Pablo Izquierdo, Vice President of Hispanic marketing at EMM Creative in Bethesda, Maryland. From the cross-over appeal of Hispanic stars like Jennifer Lopez and Ricky Martin to the growing prevalence of Cinco de Mayo celebrations in schools and communities all over the U.S., Hispanic is hot.

One of the most buzzed about trends revealed by the 2000 Census is the significant increase in the size and share of the U.S. Hispanic population. Not even the Census Bureau predicted that Hispanics would outnumber African Americans in the most recent once-a-decade head count.

Additionally, the ranks of Hispanics are projected to grow to more than 40 million by 2006, when the segment will comprise almost 14% of the total U.S. population. They exert even more influence in a number of key markets across the country. Hispanics make up over half of the population in the Miami and San Antonio areas, almost half in Los Angeles, about one-third in Houston, and one-quarter in New York. Chicago pegged its Hispanic population at 1.4 million in 2000, a 68% increase over that of just a decade earlier.

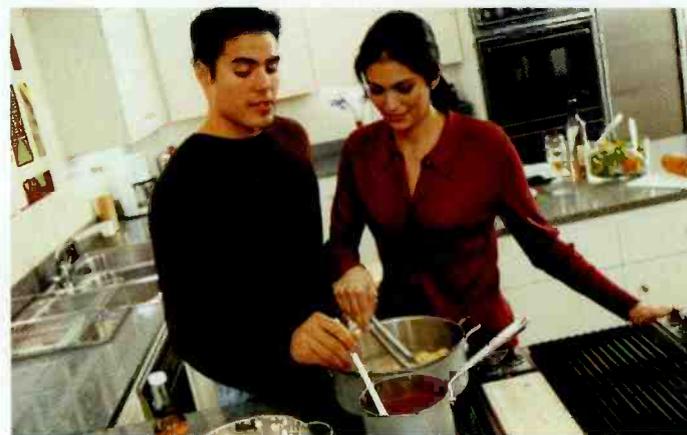
Since many marketing efforts are focused on households rather than individuals, it is important to understand the key characteristics of Hispanic homes and how they compare with those of non-Hispanics. While it is generally acknowledged that Hispanic households differ from those of non-Hispanic whites in ways that can impact marketing efforts and success, recently released Census 2000 data reveals that these contrasts have become even sharper over the last decade.

Naturally, the number and share of households headed by

Hispanics has increased right along with the Hispanic population. Almost 9% of all households in the U.S. were headed by Hispanics in 2000, and the ratio in such Hispanic hotbeds as Miami, Los Angeles and San Antonio is considerably higher.

One major difference is the larger family size of these residences. A whopping 80% of Hispanic households in the U.S. contain families compared to 67% of non-Hispanic white households. Only one-third of all Hispanic households in the U.S. contain just one or two persons, compared with almost two-thirds of non-Hispanic white households. While the average household size for total U.S. has not yet been released from Census 2000, Hispanic households average one to two persons larger than those of non-Hispanic whites across the six key Hispanic markets profiled by ACNielsen.

Less than 10% of non-Hispanic white homes contain five or more persons, but such large households are much more prevalent among Hispanics. In fact, more than one-third of Los Angeles and Chicago Hispanic households fall into this category. As a result of their bigger size, Hispanic households consume larger quantities of certain products and services. Even though they may account for fewer households, Hispanics can therefore be an even more



soundbites

One of the most exciting findings from the 2000 Census has to do with the geographical dispersion of the Latino population. California, Texas, New York, New Jersey, Florida and Illinois are now joined by a host of other states as host to Latinos who have demonstrated phenomenal rates of growth. Concentrations of subgroups within this population are also changing as evidenced by the growth of the number of Mexicans in New York and Central and South Americans in Florida. The border and all it signifies vis-a-vis ethnic concentration and the interactions of distinct cultural groups is no longer and probably has never been geographically fixed and limited. Rather, the border is a fluid psychological construct.

—DR. ANDREW B. ERLICH, PRESIDENT, ERLICH TRANSCULTURAL CONSULTANTS

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The House That Roared

attractive market than non-Hispanic white households in many metropolitan areas.

The preferences and consumption patterns of households are greatly influenced by the age of the head of family as well as the composition of the household: A married couple in the 35-44 age bracket with dependent children will exhibit different consumption patterns than those who don't have kids. In general, Hispanic households are headed by younger persons than those of non-Hispanic whites. More than one-third of Hispanic households in the U.S. are headed by someone who is younger than 35 years of age; only 20% of non-Hispanic white households are. The gap among heads of households age 65 and older is also substantial. Only 10% of Hispanic homes are headed by someone 65+, while almost one-fourth of non-Hispanic white households are.

Because they skew younger and have higher fertility rates, Hispanic households are also more likely to be comprised of couples with children under the age of 18. Over one-third meet these characteristics, while less than one-fourth of all non-Hispanic white households do. When you add the number of Hispanic households headed by a single parent to that figure, over half of these homes include at least one child under 18 years of age (compared with only 29% of all non-Hispanic white residences). This makes Hispanics an ideal market for many products and services targeted towards children and families with dependent children.

Partially as a result of their concentration in the younger age groups and early family lifestages, Hispanics display lower overall rates of home ownership than non-Hispanic whites. Less than half of all Hispanic households own their home, compared to almost three-fourths of non-Hispanic white households.

Even though we can make some overall generalizations about the segment and contrast to the general population, marketers must be careful not to assume that Hispanic households in all markets are the same. The size of Hispanic households, the age of their members and home ownership rates can vary substantially across different metropolitan markets.

While their households on average are larger, it is more common for Hispanic homes in Miami, New York and San Antonio to include 1-2 persons than those in Chicago, Houston or Los Angeles. A much higher proportion of Hispanic households in Chicago, Houston and Los Angeles are also comprised of

married couples with dependent children than those in New York, Miami or San Antonio.

Hispanic heads-of-household in Miami are much more likely to fall in the 65+ age category and much less likely to be in the 25 to 34 age group than Hispanics in the five other markets. There are slightly higher shares of elderly Hispanics running households in New York and San Antonio as well. The share of female-helmed households with children is almost twice as high in New York as in the other metro areas.

Rates of home ownership among Hispanics are somewhat higher in Miami and San Antonio, but are significantly lower in New York and Los Angeles. But one must take into account that levels correlate to the cost of housing in different metropolitan areas. The high cost of housing in New York and Los Angeles is reflected in the lower rates of home ownership among non-Hispanic whites in these markets, too.

It is easy to think of Hispanics as a homogeneous group unified by the Spanish language, but it's naive to assume that the same advertising message can be used to reach all households. There are significant differences in the national origins of the Hispanic populations living in different regions—the vast majority of those in Chicago, Houston, Los Angeles and San Antonio are of Mexican origin, while those in New York are predominantly Puerto Rican and Dominican. While these Hispanic groups share many similar characteristics, there are still important cultural differences that may impact the effectiveness of advertising and marketing messages.

"Successfully reaching Hispanic consumers requires more than a simple ethnic translation of a general campaign," Izquierdo says. "There are nuances of culture, language and market trends that must be taken into account."

Hispanics represent a growing, lucrative market with much untapped potential. But quantifying that potential and capitalizing on it requires a detailed understanding of both the similarities and differences of Hispanic subgroups. Additional Census 2000 data that is due out next year details the household income, language usage, education and country of birth of Hispanics. This will be vital to completing our national portrait of this **changing market.**

Linda Jacobsen is senior vice president, strategic resources, at Claritas (www.claritas.com), a provider of precision marketing solutions.

soundbites

Currently, about one-third of all Latinos do not have bank accounts. Also, about one-third of all Latinos are completely uninsured. Given the explosive growth of the Hispanic market, it behooves the financial services industry to devise better ways of tapping into this extremely brand loyal market segment. Marketers must work from within their own organizations, creating a more in-depth awareness of the market and its components, adapting their own cultures to better reflect—and connect with—the Latino consumer. And they must develop or evolve customized products and services designed to better meet the unique needs of Latinos. In the end, all of these efforts must be brought together under a consistent long-term branding effort that forges and cements an enduring bond between the marketer and the Latino consumer.

—RUDY RUIZ, PRESIDENT & CEO, INTERLEX

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Source: 2000 Simmons Hispanic Study



AOL Keyword: Latino

Family Affair

The U.S. Hispanic population boom changes everything for marketers who target families with kids.



BY TIM KREGOR

From sociologist to marketer to the man on the street in any major city, very few Americans could voice real surprise at the findings in the 2000 Census. The fact that the various communities comprising the Hispanic population are growing fast is especially evident to anyone residing in Mexico border states, as well as in New York, Atlanta and Washington, D.C. Now pegged at 12.5% of the population, the U.S. Hispanic segment is nearly double that measured by the previous Census. And the likelihood is, this group will more than double again in the next 50 years.

But with this population shift comes a crossroads for marketers. A great many of the best-known brands in America have traditionally been, and remain today, largely dependent on families with kids. The focus—from geographic markets to advertising media and copy—has

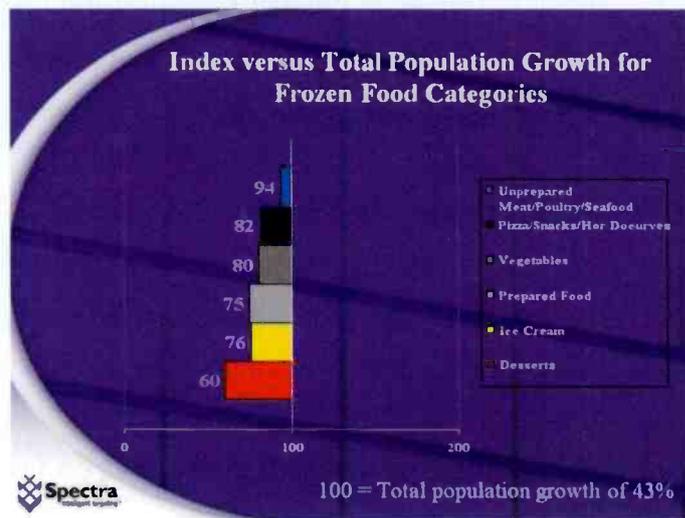
soundbites

While the family unit continues to be an enduring, central element in the lives of Hispanics, the role of Latinas in the household is changing with acculturation to the U.S. Traditional Latinas are groomed to become homemakers, but many are now cultivating personal aspirations to the world outside the home—advancing their education, seeking professional livelihoods and pursuing artistic impulses. This is requiring family members to adjust their attitudes and expectations as well. However, this is not an either/or conundrum between the family and self—these new Latina aspirations are driven by a desire to fulfill their own needs while maintaining family unity at the same time.

primarily been on targeting the broad Baby Boomer market. To fully take advantage of this newer booming demographic segment, that will have to change.

Looking toward the future, brands selling to families will need to be ready for a world where more than 25% of their consumers are Hispanic, and more than 50% are non-white. Betting that recent immigrants will soon shed cultural preferences in favor of “mainstream” fare is shortsighted, at best. And, betting on the growth of the non-Hispanic white consumer market is also a limited proposition, as today’s majority is expected to contribute only 25% of the population growth over the next decade before steadily declining in influence.

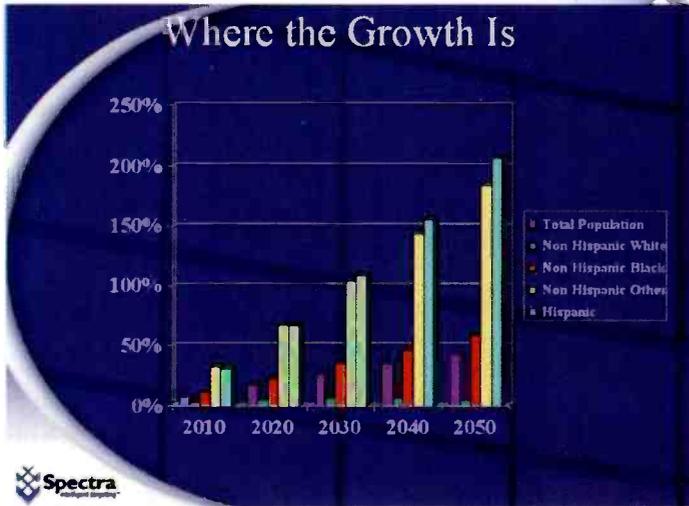
Over the next 20 years, the Census projects, the general-market Baby Boomer population will grow by less than 10% while the Hispanic market will increase by more than 70%. In



—THOMAS TSENG, CULTURAL ACCESS GROUP

HISPANIC LIFESTYLES

Family Affair



50 years, the general-market population is expected to increase by less than 10%, while Hispanic consumers should more than double their ranks.

Even more meaningful for marketers—particular packaged goods manufacturers—is how this population segment will distinguish itself by age. Hispanic consumers will account for

an increasing number of the children in this country over the next few decades. By 2030, we expect more than 50% of U.S. children to be non-white, while the vast majority of elderly

soundbites

It's time for a new investment paradigm. American businesses currently spend \$.004 in media to capture each Hispanic purchase dollar compared with \$.03 per mainstream consumer dollar—an underspending of \$14 billion. In 2001, Hispanic purchasing power is estimated at \$550-\$630—an enormous bounty waiting to be tapped into with the right level of investment. Corporations need to invest a minimum of 8% of their marketing budgets on the Hispanic market to capitalize on its exponential growth. This average should vary depending on the category. Effectively mining the staggering economic clout from the 42.5 million Hispanic market will separate today's corporate leaders from laggards.

—ISABEL VALDÉS, CO-CHAIR & PARTNER, SANTIAGO & VALDÉS SOLUTIONS;
SENIOR ADVISOR, ACNIELSEN; AUTHOR, MARKETING TO AMERICAN LATINOS

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(more than 75%) will be white consumers. Naturally, this shifting population will have its greatest impact on marketers of products that are aimed at families with children at home.

Already, Hispanic consumers are significantly important to a wide variety of food and HBC categories. For example, these households are 28% more likely to be heavy consumers—a heavy consumer is considered one who buys at least 20% more than the overall market average—of lipstick. They're also 13% more likely to be heavy consumers of popcorn, 46% more likely to buy batteries, 19% more likely to buy cookies, 44% more likely to buy shampoo and 41% more likely to buy meat snacks.

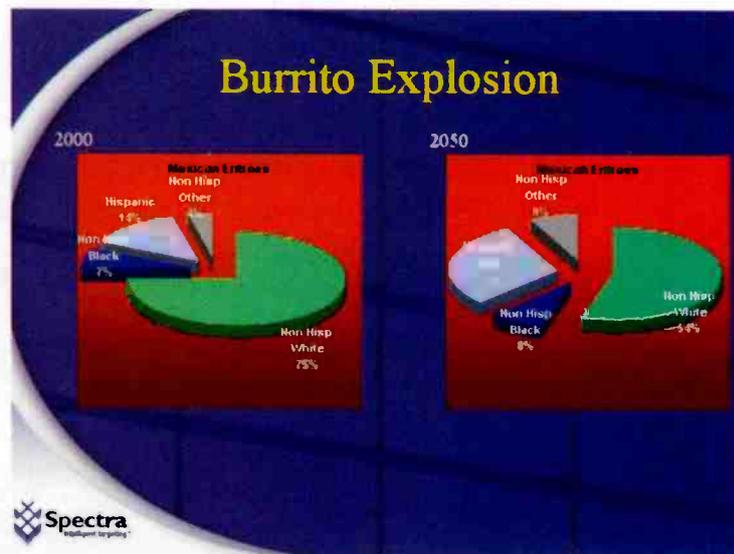
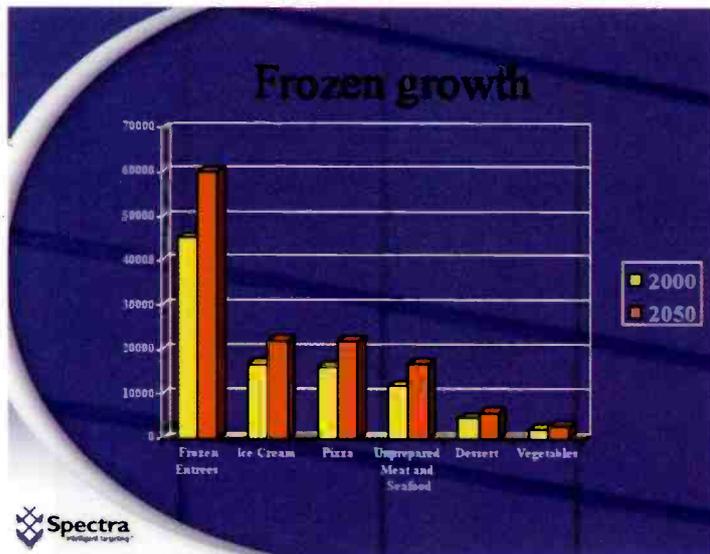
To demonstrate how a category will be affected dramatically by the changing population, we use frozen food as an example. Over the next half century, sales of frozen food items—defined as both Mexican entrees and overall prepared foods—are projected to increase at a pace that's 10% slower than the general population growth: 33% sales growth versus a 43% increase in the U.S. population.

In the process, manufacturers will more than double their

dependency on Hispanic consumers. This is true because of population growth and because of the popularity of ethnic cuisine. Mexican foods are the most popular prepared frozen entrée today, and while the expectation is that they'll decline, they'll decline less and still account for higher sales than other varieties. Specifically, Mexican frozen dinners are expected to decline from 8.5% to slightly less than 7% of all frozen food sales.

And Mexican frozen entrees will remain a favorite for segments of the Hispanic community. Whereas in 2000 Hispanic consumers accounted for 14% of sales, in 2050 that number is projected to be 30%. Conversely, white consumers—who today account for 74% of sales—are expected to be buying only 54% of frozen burritos half a century from now.

Frozen seafood tells a similar story. Today, non-Hispanic white consumers buy 83% of iced fish dinners; in 2050, that number will likely be 68%. Meanwhile, Hispanics are expected to up their consumption of microwave fish from 7% in 2000 to 17% in 2050, making them the clear opportunity segment for the category.



soundbites

Hispanic men are abandoning the stereotype of domineering sexual conqueror. Many are taking more responsibility in sex, relationships and family planning. Our 2001 Macho Poll found that unprecedented numbers of Hispanic men are buying and using contraceptives, engaging in family planning, and talking with their kids openly about sex. This is particularly true among 30- to 44-year-olds. One of the biggest surprises is that 56% of all men surveyed say they would take a contraceptive pill if one existed. The shift is cultural, not just sexual. One reason is that in the U.S., it's easier for Hispanic women to become financially self-sufficient, so there's less need for a domineering man. Also, community groups are helping men create more progressive ideals. For example, thousands of men now attend *Compadres Network* workshops on the new meaning of manhood.

—CARMEN ALICIA FERNANDEZ, EDITOR OF SELECCIONES, THE SPANISH-LANGUAGE MONTHLY PUBLISHED BY READER'S DIGEST ASSOCIATION

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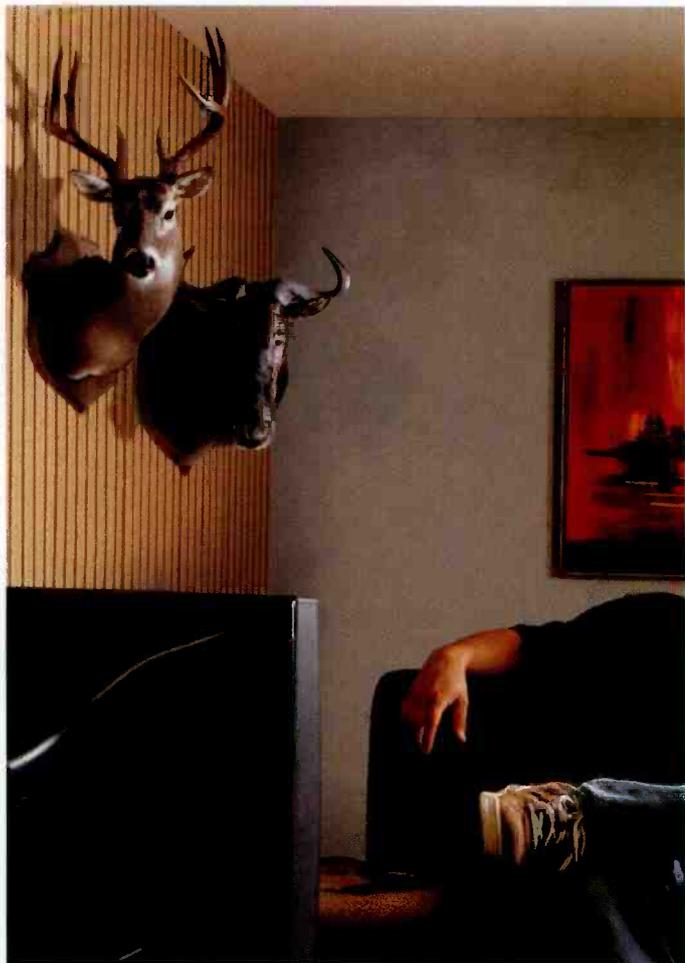
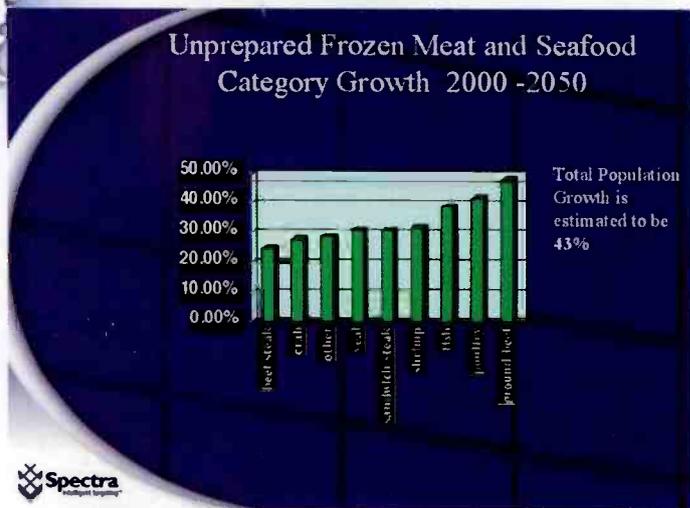
Family Affair

soundbites

Marketers who have invested ad dollars in the growing Hispanic market have been rewarded with exceedingly brand loyal consumers. Because nearly 60% of U.S. Hispanics are foreign born and Spanish dominant, they are particularly reliant on brands for purchasing decisions. According to Yankelovich, 67% of Hispanics say it is risky to buy an unfamiliar brand versus 50% in the general market. More importantly, a recent study commissioned by Time Inc. reveals 68.2% of Hispanic adults expect to purchase the same brand of automobile within the coming year versus only 23.9% of non-Hispanic whites. These findings reinforce the necessity of establishing a strong brand identity among Hispanic consumers.

—LISA QUIROZ, PUBLISHER OF PEOPLE EN ESPAÑOL

Not since the post-World War II era have we seen a population shift that rivals the dramatic change expected in the next 50 years. Much sooner than that, companies competing in the low-margin business of consumer packaged goods will have their fortunes shaped by how well they understand and cater



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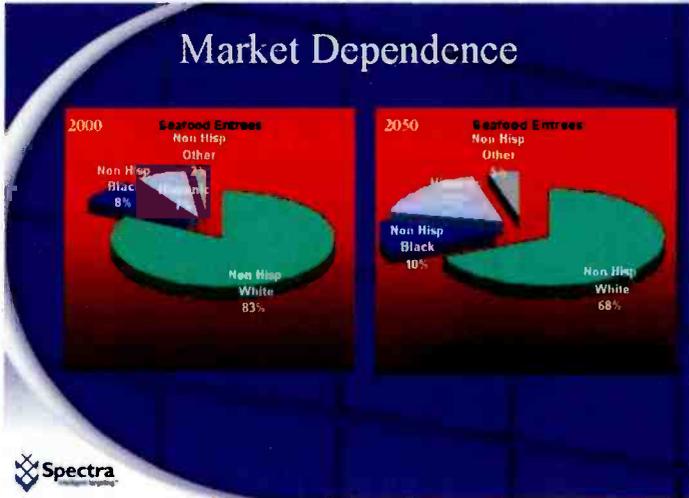
to a new generation of families—one that speaks a different language and responds to different cues.

Tim Kregor is executive vice president, group product management, at Spectra (www.spectramarketing.com), a Chicago, Ill.-based supplier of intelligent targeting solutions.

soundbites

According to the Census 2000 findings, the Hispanic population is a young one. While the median age of the entire U.S. population is 35.3 years old, the Hispanic population registers at 25.9 years. In addition, a greater percentage of Hispanics are under 18 years of age: 30% compared to the entire U.S. 25.7%. There is already movement on behalf of major advertisers to reach this crucial consumer group, whose brand loyalty can be ensured as they grow up alongside their prominent products. With Hispanics as the fastest growing population group overall, focusing on the vital, largely urban, hip generation of Hispanic youths is focusing on the future of America.

—DAISY EXPÓSITO-ULLA, PRESIDENT & CEO, THE BRAVO GROUP



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OPINION

Donald Evanson

Media Managers to the Rescue

In uncertain times, clients need media plans with real results

America's business managers are scrambling to develop reasoned budget presentations to senior management in an effort to maintain brand advertising funding in 2002. They face a daunting uphill fight.

For starters, the pattern of economic uncertainty is global. In the U.S., recent events have thrown everyone's plans awry. The strong U.S. dollar makes trade with foreign countries difficult. Airlines have cut flight schedules, and they are seeking financial help from Congress. American consumers are in shock, and forecasting consumer spending for 2002 is risky. The Dow Jones has dropped below 9,000, and it is painful to watch the NASDAQ hover at 1,500. The jobless rate is 5 percent and could go higher by the end of the year. Layoffs and furloughs are spreading as companies aggressively downsize to meet shareholder profit expectations. Mirroring the decline in company earnings, the 2001-02 broadcast and cable upfront market is down almost 20 percent this year.

The Magazine Publishers Association took Bernard Ryan's 1999 *Advertising in a Recession* and its observations on the road to advertisers and agencies. *Advertising in a Recession* summarizes the market standing of companies

ONE STEP TO IMPROVE ROI IS TO APPLY MODERN RESEARCH TO VALIDATE THE PERFORMANCE OF PROPOSED MEDIA INVESTMENT STRATEGIES.

that maintained or increased market efforts during the six U.S. recessions from 1960 to 1990. The results favor advertising in 2002, if the past foretells the future.

However, every piece of investment literature plainly states that past performance does not guarantee future results. So, business managers are caught in a bind. They want management to continue to support their brand with 2002 ad funding while being unable to guarantee success.

Agency media money managers can help execs make their case to management. With \$200 billion in media spending in 2001 and an expected overall decline of about 15-20 percent in 2002, media managers can maintain economic equilibrium by improving the return on client's media investment by \$30-\$40 billion in 2002. One step to improve ROI is to apply modern research to validate proposed media investment strategies in the marketplace.

Too many current agency media performance contracts are based on fuzzy subjective criteria. Media agencies cannot expect cash bonuses just for providing CPM gains, value-added delivery or multichannel communica-

tion media plans that surround the target prospect.

Clients want media strategies that will move their business. They want more than assumptions of future performance, they want validation the media plan will positively effect results. By assuring clients of the value of media in the marketing mix, advertisers can begin to plan 2002 budgets with greater assurance of success. Media management firms can field reliable tracking research that measures the impact of the media strategy in attaining client-marketing goals. Media money managers that are able to provide that reassurance are invaluable to business managers making the case for 2002 media investment.

Another step media managers can take to improve 2002 media productivity is to make bold strategic recommendations. A review of media spending within major business categories reveals that over the past five years, the profile of media allocation has remained stable from year to year. This reflects repetitive media proposals.

In these harsh economic times, business is not normal. Media executives with the ability to lead clients out of the ordinary and into modern patterns of communication will succeed while the timid falter. Innovative, strategic media thinking in 2002 can be worth \$10-\$15 billion in return on invested media dollars for business managers.

Innovation isn't easy to present to clients. Media managers with the talent to create unique media strategies, the skills to effectively present those concepts to clients, and the ability to gain approval to proceed are respected professionals in the ad community. An ad manager with that level of media manager support has a valuable asset to help him confidently embark on 2002 advertising.

A third step is for media managers to shift discussion from dollars to media impression delivery. In 2002, clients will have 10-15 percent improvement in media impression efficiency as a result of stiff price and value-added negotiations by broadcast and print media buyers. That is worth \$20-\$30 billion in extra impression delivery for advertisers. Combine the three initiatives: validate media plans based on sales tracking research; employ innovative media strategies incorporating modern communication venues; and negotiate improvements in impressions. That should yield \$25-\$40 billion in increased productivity and is enough to offset expected declines in 2002 media dollars.

Advertisers that view media as an investment and media executives as money managers of a portfolio of media options have strong allies in planning for marketing success in 2002.

Donald Evanson is president of Marketing & Media Insights, a Secaucus, N.J.-based media consulting firm. ■

POLITICAL SPENDING ON TV: HAS EVERYTHING CHANGED?

2002 was expected to be a banner year for political ad spending. After Sept. 11, the political establishment is rethinking what they say and where they should say it. **BY ALICIA MUNDY**



■ Florida Gov. Jeb Bush (at left, with former state Secretary of State Sandra Mortham) expects to face Janet Reno in next year's gubernatorial race.

■ Democrat Tom Harkin (top, with then President Bill Clinton) may receive extra support from the party now that he's a Senate committee chairman.

■ Elizabeth Dole (center) has already thrown her hat into the ring of competitors for Sen. Jesse Helms' North Carolina seat.

■ New Jersey Sen. Bob Torricelli (bottom, second from right) is fighting off a federal investigation but still is in the running.

Before and After. Before the terrorist attacks on the World Trade Center and the Pentagon, television stations were clinging to a secret hope. The year 2002 loomed as perhaps the greatest bonanza in political advertising, with issues and candidates portending a bigger political spending year than 2000. Surveying the landscape prior to Sept. 11, Howard Nass, the veteran analyst at Initiative Media, had said, "Campaign ads may be the salvation of television stations next year." He was not alone in his optimism.

Now, in this post-apocalyptic political world, many issues that seemed settled regarding the potential flow of political ad dollars and their impact on stations' revenue are up in the air. Next year will still be a very big year for political and issue ads, say the pros. But two major factors may impact that: the recession, and the tenor and kind of ads that candidates and advocacy groups will feel comfortable running. In short, political ads could generate as much as \$1.5 billion or more, but they could just as easily peter out at \$800 million.

Prior to the attacks, TV ad-spending analysts and broadcasters believed they could make up some of this year's losses and even bank some revenue for 2003, based on initial predictions of political spending in 2002. Campaign consultants told their clients that next year's necessities would include food, water, electricity and political ads. They'd have to pay to play.

"Next year stands to repeat 2000 as the tsunami of political ads," said Lee Westerfield, a broadcast TV analyst with UBS Warburg, a month ago. Everything was up for grabs: 36 governor races, including major-market states like New York, California, Texas, Illinois, Michigan and Florida. The Senate majority hung by one vote, and GOP mainstays were retiring. Only nine seats in the House separated the GOP from the Democrats (not counting two independents), and the Dems stood to gain seats in an "off-year" election. Finally, the post-census redistricting moved 12 congressional seats from Northeastern states like New York and Pennsylvania to California, Texas, Georgia and elsewhere, leaving incumbents to play "musical chairs," making for a huge primary season in addition to the fall free-for-all.

That much has not changed, says Westerfield today. Next year, he says, "will be huge, no doubt. The need to buy political ads during this critical off year is the same. But the paradigm in which those ads will run has changed."

"It's crass to consider this right now," says GOP consultant Greg Stevens, of Stevens, Reed & Curcio, "The main issues that had the Democrats licking their chops are temporarily off the table. Health care, prescription drugs, social security and the environment have been swept aside." In terms of the impact on media buying, if those issues disappear, they could take away millions of dollars in related TV and print ads.

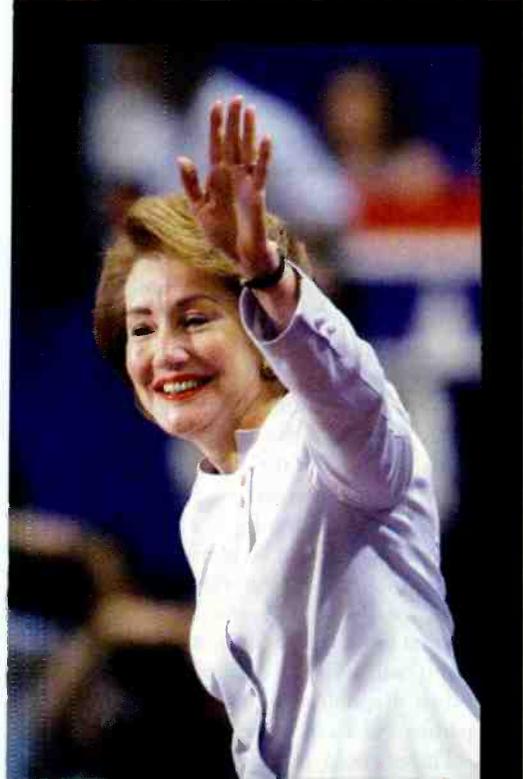
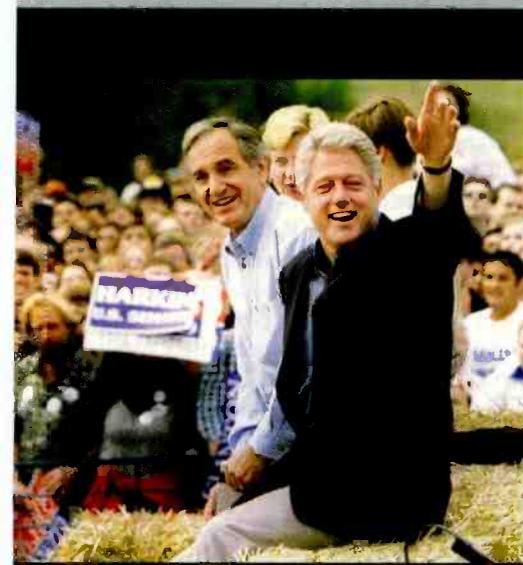
That said, political analysts are also cautioning, "Don't write off 2002 yet as a boom year." They cite what transpired in America only months after the assassination of a popular young president in November, 1963. The country was devastated, and leaders worried that the Soviets or Cubans were plotting war. But that didn't stop 1964 from being one of the first big years for political ads. And the calls for unity in the wake of John F. Kennedy's murder didn't keep Republicans or Barry Goldwater from attacking incumbent President Lyndon Johnson. He returned the favor with the infamous "Daisy" ad. Kennedy was barely in his grave when everybody went back to the business of bare-fisted politics.

"It's a truth that political campaigns and elections go on regardless of what happens," says Ron Faucheux, editor in chief of *Campaigns & Elections* magazine. There has been an appropriate pall in politicking in the aftermath of the terrorist attacks—the governor's races in Virginia and New Jersey have fallen off. Any ad right now is unseemly, no matter how tasteful. But six months from now, the country may see a resurgence of business as usual.

"I think that's the case," says Chris Rohrs, president of the Television Bureau of Advertising. He originally anticipated that spending could exceed the \$1 billion-plus spent on all the races in 2000. Amid reports that TV ad spending would fall 4 percent next year, many Wall Street analysts, spot buyers, consultants and those who track fundraising estimated that 2002's political ad sales could keep stations' bottom lines level or even raise it a bit.

Greg Schaefer, vp/station manager at WCBS in New York, had said in August, "I've heard that 2002 is going to be as big, if not bigger, than 2000," pointing to New York's impending governor's race and another Senate race in New Jersey. And Bob Leider, vp of Sunbeam TV, which owns Miami's Fox affiliate WSVN and Boston's NBC affiliate WHDH, explained, "Any campaigns for House and Senate seats are going to be larger than life because of what it means for the balance of power in the Congress...A lot of outside money starts coming in. That's what is going to turn this business around. It's really going to help the fourth quarter of next year."

Now Rohrs says, "We'll still have a very active year with a high spending level. That's the



CLOCKWISE FROM LEFT: JOE BURBANK/THE ORLANDO SENTINEL/ART; STEVE JAFFE/REUTERS; PAUL RICHARDS/ANP; PHOTO; ERIC MENCHER/PHILADELPHIA INQUIRER/ART

system...The world could look different in eight months," he adds. "We're competitive. We have different plans, programs and messages to convey. That won't change."

But the environment has. The tenor and dialogue of campaigns may be entirely different, says Democratic consultant Tom King of Fenn & King. "I think there won't be as many harsh attack ads," he says. Partisan politics will be downplayed. "Many ads will be value-oriented, family-oriented."

Patriotism will have to be part of any ad opposing an incumbent, in order not to appear out of step with the calls for unity. Flags will abound. Democratic strategist Mark Mellman, who is advising Mark Green in his bid to become mayor of New York, says, "Candidates will be emphasizing their military experience and records." And endorsements from firemen and police officers will carry more clout.

The status of the war on terrorism is paramount. If President Bush's policy appears to stumble, there will be plenty of room for

cators say this 2002 is going to be a very targeted race by both national parties, and Orlando is the eye of the hurricane." About 30-40 percent of that potential \$60 million was destined for the I-4 corridor from Orlando to Tampa. And Florida gets two new House seats, with no sitting incumbents. Bauman thought Florida was such a magnet that political spending could start in the fourth quarter *this* year.

But now that Bush has finally grown into the role of president, argues Greg Stevens, it makes any dispute about the legitimacy of his presidency "irrelevant." That would help Jeb Bush enormously and make Florida less enticing as a place for advocacy groups and the Democrats to throw money. But again, if Bush suddenly falters badly, Florida is back in play.

Texas and California still hope to generate spending. Mellman anticipates that despite the recession, "It's possible that you'll see \$30-\$40 million alone in the California race," where the GOP would love to unseat Gov. Gray Davis. In Texas, veteran GOP Senator Phil Gramm is stepping down, while the governor's race there

1,500 points."

Nevertheless, political dollars are still chump change to stations. Eric Land, vp/gm of NBC affiliate WFLA in Tampa, notes, "Olympics and elections dollars represent incremental funds to the market. Political dollars at their height in a presidential year might represent 4 to 5 percent of a market's total revenue."

In New York, for example, one broadcaster noted that the six top stations there bring in about \$1.6 billion annually. But political advertising only accounts for roughly \$45 million of that—unless another wealthy candidate such as Jon Corzine drops in. Last year, the Democrat spent \$60 million in New York markets, \$10 million alone at WNBC, to become a senator from New Jersey. "There are no Corzines this year," sighs another New York station exec. But there's always Steve Forbes....

Wealthy dark horses aside, the recession will color next year's market. Prior to the attacks, fundraising was up. In August, Common Cause released a tracking report showing soft money soaring, despite the economy. In the first six months of this year, Democratic and GOP party committees took in \$98.8 million in "soft money," almost *triple* the amount raised in the same period in the last off-year, 1997-'98. It was almost double the \$54.4 million raised in the first six months of the 1999-'00 presidential cycle. Of the \$98 million, the GOP got \$65.6 million.

Now, however, fundraising is stalled. Apart from the recession, many fundraisers say they are putting their efforts into charities for the victims of the terrorist attacks. It's uncertain whether that trend will continue into 2002 and whether it will affect Democrats' resources more than Republicans'. Fauchaux expects both parties will focus more money on fewer races. Those could include races involving Democrats who recently assumed committee chairmanships when the Senate shifted power this summer, such as Tom Harkin of Iowa (who heads Agriculture) and Montana's Max Baucus (Finance). But that approach could impact the overall spending effect on stations.

"It's a different environment now," says Stevens. It doesn't mean there won't be a lot of money tossed around, he adds. But there's a dozen working scenarios involving Bush's popularity, the war, the economy, and Democrats' ability to find their voice and strong candidates. In such a maelstrom, no one's going to spend or raise money early on, or without a specific goal in sight. —with Katy Bachman and Jeremy Murphy

Alicia Mundy is Mediaweek's Washington bureau chief.



Americans "only spent \$250 million electing the leader of the free world—Revlon blew \$311 million selling lipstick." —CASTELLANOS

Democrats to challenge. Ironically, if there's a quick resolution to the conflict, the economy and the "soft" issues that favor Democrats will have more bearing, says King. As Bush's father learned, a quick military win is soon eclipsed by "the economy, stupid." Energy policy (particularly in light of concern about dependence on Arab oil) may move to front-burner status, and that's where money from interest groups on all sides may come into play, says Mellman.

One crucial state that may lose its anticipated windfall for next year is Florida. Sunshine state station managers were salivating about their prospects for 2002 before the attacks. "Oh, hell, everyone's gonna be coming down to Florida to refight the last war," GOP strategist Alex Castellanos had said about the "hangover effect" from 2000. Indeed, former Attorney General Janet Reno's challenge to Gov. Jeb Bush, the man whom Democrats hold responsible for Bush becoming president, looked to make Florida the biggest battleground.

Some station groups were estimating a \$60 million governor's race. "Just astronomical," said Bill Bauman, vp at WESH, Hearst-Argyle's Orlando NBC affiliate. Because of the "2000" effect, Bauman explained, "all our indi-

is wide open. Stevens says, "Bush will view [both races] as a vote on his popularity in his home state and credibility nationally. He's got to go in there with money, and the Democrats will counter it because of its huge symbolism."

How much can a surge in political spending help overall TV advertising? Castellanos believes "there's room for political advertising to grow," both absolutely and as a share of total ad revenue. From Castellanos' viewpoint, Americans "only spent about \$250 million last year [from the conventions on] electing the leader of the free world—Revlon blew \$311 million selling lipstick, and Procter & Gamble spent ten times more: \$2.6 billion."

And despite the recession, Mellman says that the fractured TV ad market and cable cannibalization mean politicians must spend more money anyway these days. "You're up against more clutter, and fewer people are watching TV in a concentrated fashion. I have to put my candidates on TV at three times the level I did eight years ago," he adds. Democratic spot buyer John Hutchins of Media Strategies and Research, adds: "Several years ago, you could get away with buying 500 gross rating points. Now, to get your message out, you need to buy



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Keeping the faith
in Houston: Gregory

Pepper Publisher Handles Hot Topic

WHILE MANY MAGAZINE EDITORS have helped readers deal with the recent terrorist attacks through service pieces in their pages, Joel Gregory's brand of service goes directly to the people. Gregory, publisher and editor of national enthusiast magazine *Chile Pepper* (circulation 140,000), is an ordained Southern Baptist minister who left the pulpit in 1991 to go into business. But he's still in demand at church services across the country for his powerful oratory. On Sept. 16, Gregory kept his engagement to address the congregation of the historic Mt. Sinai Church in Houston on its 102nd anniversary, but changed the content of his sermon in light of the Sept. 11 terrorist attacks. He advised the mostly African American parishioners, who've already seen much hardship as a community, to consider the teaching of Psalm 46, which tells people to seek God as a refuge in troubled times.

Overwhelmed by the outpouring of emotion and faith, Gregory said: "I've always said that this is a secular nation with a thin veneer of religion, but now I realize I'm wrong. It's a very religious nation with a thin veneer of secularism." —Lori Lefevre

Firemen Pic Clicks With Thousands

"EVERYWHERE YOU TURN, it's still popping up," says *The Record's* Thomas Franklin of his now-famous photograph of firemen raising an American flag amid the rubble of the World Trade Center several hours after the attacks. Since *Mediaweek* spoke to Franklin three weeks ago, the picture was spotted on a button worn by Yankees pitcher Roger Clemens during the New York team's first home game after Sept. 11. It also showed up in a commemorative collage at halftime in ABC's *Monday Night Football* broadcast last week.

The number of requests received by the Hackensack, N.J., newspaper for copies of Franklin's photo has skyrocketed to an esti-

mated 10,000, including one from New York Senator Hillary Clinton's office looking to put it on a postage stamp.

Franklin is both overwhelmed and honored, but he bristles at any suggestion that he has brought notoriety to the *Record*, which is offering the photo free for downloading from www.groundzerospirit@northjersey.com and asking recipients to donate to various relief funds. He says: "If there's anything positive out of this, it's the emotional connection that people feel from the picture...and the outpouring of generosity [in donations]." —ATK with Joe Strupp of Editor & Publisher

Studio Stop

For the Westwood One/CBS Radio Sports *Monday Night Football* broadcast last week, members of the NYC fire and police departments and the Port Authority police department joined hosts Boomer Esiason and Howard David in the studio and helped call the game. (L. to r.) David; Westwood One president/CEO Joel Hollander; Esiason; Sgt. John Gillburn of the Port Authority Police; and NYC Police Detective Kevin Muldowney.



Movers

MAGAZINES

Bill Marken, who helped launch Hearst Magazines' now-defunct *Rebecca's Garden* in 1997, has been named editor in chief of World Publications' *Garden Design...At Essence*. **Barbara Britton** has been promoted from vp/national advertising director to vp/associate publisher of sales.

CABLE TV

Joel Chiodi was named director of promotions for the Game Show Network, responsible for integrated marketing initiatives and building multiplatform promotions. Previously, Chiodi was director of marketing for IFILM.

RADIO

Ken Berry was named station manager at Entercom Communications-owned KIRO-AM and KNWX-AM in Seattle. Previously he was with ABC Radio as program director at KGO-AM in San Francisco...**Michael Panebianco** was promoted from national sales manager to director of sales for Nassau Media Partners, the new projects division of Nassau Broadcasting Partners...**Josh Easler** was named to the new post of account exec for music and entertainment marketing at Greater Media's WKLB-FM in Boston. Easler was the station's promotions coordinator.

SYNDICATION

Among many changes in its marketing department, Columbia TriStar TV Distribution has hired **Gregory Calvosa** and **Mike Freeman** as directors of marketing. Calvosa was most recently an independent marketing consultant, and before that director of worldwide marketing for Pearson Television. Freeman was director of creative services for E! Networks.

TELEVISION

Madelyn Bonnot has been upped to vp of TV for Emmis Communications. She was vp of operations for Emmis TV and general manager of Fox affiliate WVUE-TV in New Orleans. **Joe Cook** came out of retirement to replace Bonnot as vp/gm of WVUE-TV. Before retiring in July 2000, Cook was general manager of WALA-TV, Emmis' Fox affiliate in Mobile, Ala.



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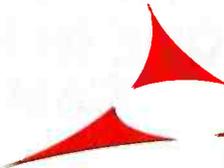
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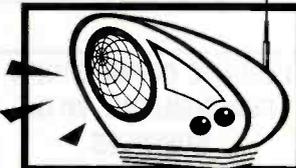
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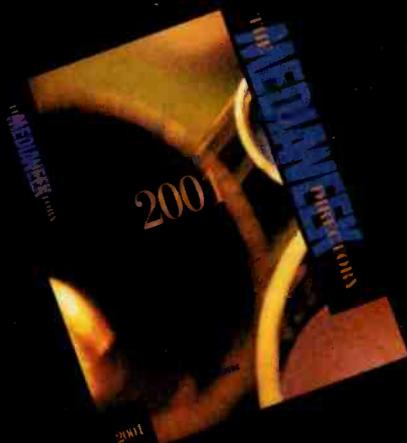
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Fox Grabs CNN's Main Man in Afghanistan

Steve Harrigan, CNN's primary correspondent in Afghanistan, last week signed with rival Fox News Channel for a lucrative multi-year contract. After 10 years with CNN, Harrigan began reporting for FNC via video-phone on Sept. 30, a coup for FNC because the network has had difficulty acquiring visas for its journalists to enter the country. Harrigan's departure for FNC came a few weeks after CNN correspondent Nic Robertson was ordered out of Kabul by the Taliban last month. But the network still has 12 out of 75 staffers from its Central Asia bureau stationed in Afghanistan as well as a full satellite uplink in the northern part of the country. Matthew Chance, who replaced Harrigan, joined correspondent Chris Burns in northern Afghanistan. The announcement about Harrigan's flip to Fox came a few days after the Oct. 1 issue of *Mediaweek* went to press with an item about him in the Media Elite section.

Granite Shopping WDWB

Just two months after dismissing talk of liquidating any of its assets, executives from Granite Broadcasting are shopping WDWB, the company's Detroit WB affiliate. The company last week retained Goldman, Sachs & Co. to help find a buyer for the station. Granite, which owns nine network-affiliated stations, has experienced financial turbulence since February 2000, when it agreed to pay NBC more than \$360 million over 10 years for rights to the Peacock network's San Francisco affiliation. That outlay, coupled with the overall slowdown in the economy, has sent Granite's stock plummeting to less than \$2 from as high as \$13 a share. Tribune Broadcasting and Post-Newsweek Co. have been mentioned as possible buyers.

Cartoon Net Attracting Adult Advertisers

Cartoon Network, which largely focuses on the 2-11 demographic, has increased its number of adult-targeted advertisers this year to 46. In 2000, the network carried 35 adult advertisers. Like other kid-friendly networks, Cartoon has pushed its sales force to diversify its advertiser pool in the face of declining spending by toy companies and other traditional kids categories. But Cartoon has also attracted new advertisers by introducing the Adult Swim programming block, aimed at cartoon fans aged 18-34.

Among the net's new sponsors are Kimberly-Clark, marketing Kotex; American Honda Motor Co., marketing the Odyssey car; and the U.S. Navy.

WPXI's Howell to Retire at Year's End

John Howell III, longtime vp/gm of Cox Broadcasting's Pittsburgh NBC affiliate WPXI, announced he will retire at the end of the year. Howell has overseen the station since 1984. He has also served as gm/vp of two regional Cox NBC affiliates—WJAC-TV in Johnstown, Pa., and WTOV-TV in Steubenville, Ohio. The company has not announced a successor.

Nick, Inc., Trad Home Up Their Numbers

Nickelodeon magazine will raise its circulation rate base 11.1 percent this February, from 900,000 to 1 million. Also, G+J USA's *Inc.* will increase its guaranteed circulation to 665,000 from 650,000, as of its January issue. Meredith Corp.'s *Traditional Home* will boost its rate base with editor Mark Mayfield's first issue in February, from 800,000 to 825,000.

Outdoor Up 2% in First Half

Despite the soft ad economy, outdoor advertising revenue held up through the first half of the year. According to figures released last week by the Outdoor Advertising Association of America, outdoor revenue through June 2001 was up a modest 2 percent, to \$2.7 billion. Categories contributing to the medium's strength were transportation, hotels and resorts, up 23 percent; financial services, up 20 percent; and telecommunications, up 11.1 percent. While local services and amusements continue to spend the most in outdoor, the category was down 18 percent. The OAAA is forecasting outdoor to end the year up 2 percent over last year, to \$5.5 billion.

Radio Network Boutique Adds Sales

Syndication Solutions, a radio network boutique that syndicates several shows to more than 750 affiliates, including *On the House With the Carey Brothers*, *On the Job With Steve Viscusi*, *On the Money With Ray Lucia* and *Health Talk With Shannon and Matt*, is taking its sales in-house beginning Oct. 15. Previously sales were handled by the shows themselves and by Global Media. Bob Carey, president and exec- (continued on page 50)

The **American Magazine Conference 2001**, the annual conference of the Magazine Publishers of America and the American Society of Magazine Editors, will be held Oct. 21-23 at the Sheraton New York Hotel and Towers. Contact: 212-872-3700.

The International Radio & Television Society Foundation will present **IRTS Newsmaker Luncheon: Network Entertainment Chiefs** Oct. 24 at the Waldorf-Astoria in New York. Contact: 212-867-6650.

Media All-Stars will present a **musical benefit for victims of the World Trade Center attack** Oct. 25 at Le Bar Bat in New York. The event will feature live bands comprised of media and ad-industry professionals. Donations of \$20 per person will go to the Widows and Children's Fund. For more information, visit www.nycgigs.com.

The Conference Board will present the **2001 Marketing Conference: Marketing Metrics and Execution**, Nov. 1-2 at the Waldorf-Astoria in New York. Contact: 212-339-0345.

CTAM will present "**The Broadband Opportunity Conference: The FYI on HSI + iTV**" Nov. 6-8 at the Sheraton Premiere Tysons Corner in Tyson's Corner, Va. Contact: 703-549-4200.

The Magazine Publishers of America's **Big Bang III: Maximizing Magazine PR** event will be held Nov. 12 in New York. Media critic and author Ken Auletta will keynote. Contact: 212-872-3767.

PriceWaterhouseCoopers will present its annual **global entertainment, media and communications summit** Nov. 15 at the Waldorf-Astoria in New York. Speakers will include Martha Stewart, CEO of Martha Stewart Living Omnimedia. Contact: 646-394-2413.

SCHEDULE CHANGE: "What Teens Want: Marketing to a New Generation Ages 12-18," a seminar presented by Adweek Conferences and YM magazine, has been postponed. Originally scheduled for Nov. 5-6 at the Hilton Universal Hotel in Los Angeles, the new date is April 8-9, 2002, same location. Contact: 888-536-8536.

(continued from page 49) utive director of SSI, said the move was the next step in the company's three-year evolution. "We're going to work on matching our niche products with niche sponsors," Carey said.

B Mania Expands Offerings

B Mania, the cable network that showcases classic and contemporary "B" cinema, expanded its offerings last week. Distributed by digital independent-programming provider OlympuSAT, the network acquired two new packages of more than 85 films, including *Terror in Beverly Hills*, starring Frank Stallone, and *Bride of the Gorilla*, with Raymond Burr. B Mania, which launched last year, has a companion Web site that celebrates B movies.

Nielsen Sets Meters in Richmond, Dayton

Nielsen Media Research last week turned on TV-set meter panels in Richmond, Va., and Dayton, Ohio, the 58th- and 60th-largest TV markets respectively. The TV ratings firm now has overnight meter measurement in 53 local markets covering 68 percent of U.S. TV households. The company still collects demographic information in local markets using TV diaries, except in Boston, which is in a demonstration period as the market transitions to people meters.

Radio Martha Cooks Up Affiliates

With the addition of Salem Communications' WAVA-FM in Washington, D.C., Martha Stewart's 90-second daily feature, *askMartha*, now airs on more than 350 radio stations, including 23 in the top 25 markets. Produced by Stewart's Martha Stewart Living Omnimedia, the lifestyle feature offering quick tips and information from the expert herself has been syndicated by Westwood One since 1997.

"Driving" Keeps Rolling With Bridgestone

Bridgestone/Firestone Inc. has extended its exclusive sponsorship of "Driving Today," an Internet program for car enthusiasts carried on 18 Web sites. The program, which delivers features, news, information and major trends shaping the automotive industry to an estimated audience of 14,823,000 each month, is supported by a cross-platform media push. Jack Nerad, editor in chief of *Driving Today* and former editor of *Motor Trend* magazine, hosts *America on the Road*, a one-hour radio program syndicated nationally on more than 300 stations. It has

Mancow Schticks With WKQX

Controversial top-rated morning radio host Mancow (Eric) Muller has re-signed with Emmis Communications for another three years on WKQX-FM (Q101), the company's Alternative Rock station in Chicago. The deal is comparable to Mancow's previous three-year, \$9 million contract, which expired in mid-July. Since then, Mancow agreed to continue on-air while both sides hammered out an agreement. Known both for streaking on the streets of Chicago as well as for pushing the envelope on-air, Mancow is No. 1 in mornings among 18-to-34-year-olds. He was recently under FCC investigation in response to complaints of indecency; Emmis defended Muller's comments earlier this month as conforming to community standards. Mancow also makes brief daily morning appearances on *Fox and Friends*, Fox News Channel's morning show.



Emmis signed morning-man Mancow for three more years.

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a weekly audience of 3 million. Vignettes within the program promote "Driving Today." In addition, Nerad references "Driving Today" when he does his frequent guest spots on CBS' *The Early Show*.

New York, Abrams Team for Sept. 11 Book

New York magazine and Harry N. Abrams Inc. will publish a commemorative book on the World Trade Center attacks. The 128-page hardcover, entitled *September 11, 2001: A Record of Tragedy, Heroism and Hope*, will be distributed nationally in early November for \$19.95. The first printing will be 50,000 copies. It will chronicle the events as they unfolded in the early hours of the attacks, as well as spotlight the response of the city. All the proceeds will be donated to the September 11th Fund.

A.M. Team Fuels WTJM's Format Change

New York Jammin' Oldies station WTJM-FM has introduced a new morning team, radio personality Jeff Foxx and comedian George Wallace. Since June, WTJM-FM executives have been working to remake the station into "The Heart and Soul of New York," aimed at a core African-American female 35-44 audience. Overall, the station ranks 19th in the market with a 2.4 share. While Foxx, a former morning personality on Emmis Communications' WRKS-FM, and Wallace have appeared together before, WTJM program director Frankie Blue decided to pair them for a regular show, entitled *The Jammin' New York Wake-up Club With George Wallace and Jeff Foxx*, which premiered Sept. 17. Out is Jay Thomas, who hosted mornings for about

two years and still had time left on his contract with the Clear Channel-owned station. Thomas' ratings were bleak, with a 1.8 share overall and a 2.3 among Adults 25-54. WTJM will now be distinguished from its two main competitors in the market, WRKS and Inner City's WBLS-FM, WTJM, by having a team of morning-show hosts. Wallace and Foxx are up against two strong national Urban personalities syndicated by ABC Radio Networks: Doug Banks is carried on WBLS, Kiss carries Tom Joyner. Both pull strong ratings among Adults 25-54, Banks with a 4.2 share and Joyner with a 3.5.

Heavier Inside Edition Up at Season Start

Focusing its content since Sept. 11 on the aftermath of the terrorist attacks on the U.S., King World Productions' newsmagazine strip *Inside Edition* has been one of the few shows in syndication to see a ratings rise at the start of the season. Through the first four days of the October ratings book, *Inside Edition* grew 5 percent to a 4.1 metered market rating from a 3.9 a year ago, according to Nielsen Media Research.

GQ Cancels Awards Event

Condé Nast's *GQ* has canceled its "GQ Men of the Year" awards event, which was scheduled for Oct. 17 at the Beacon Theatre in New York. The men's magazine will still honor the men, chosen by its readers, in its November issue. The staff decided that the sixth annual awards celebration wouldn't be appropriate considering the mood of the country in the aftermath of the Sept. 11 terrorist attacks.

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Stand and Deliver

Barnes & Noble and Anderson eye newsstands' potential to generate magazine subscriptions

AS THE TRIED-AND-TRUE METHODS OF DIRECT RESPONSE CONTINUE TO FALTER, concerted efforts are under way to sell subscriptions at newsstands in stores. Two behemoths—Barnes & Noble, the nation's biggest bookseller, and Anderson News Corp., the country's largest wholesaler—are

rolling out in-store programs to tap new subscribers. "We're convinced the newsstand, that has [until now] mainly sold single copies, is a great platform to market subscriptions to consumers," notes Jay Clarke, CEO of Anderson-owned subscription agent Magazines.com (Time Inc. and Meredith Corp. own stakes).

With advertising revenue all but vaporized, the need to jump-start the subscription side of the publishing business is all the more critical. Stamp sheets, which in the mid-'90s accounted for as much as 35 percent of a magazine's subscription volume, now count for barely 5 percent; direct mail can now only be relied on for about 10 to 15 percent of volume versus 25 percent a few years ago, says Dan Capell, editor of *Capell's Circulation Report*. Also, magazine insert cards are having mixed results. The percentage of blow-in cards gleaned from subscription copies is off 30 percent, reports *Capell* and *Circulation Management's* survey of publishers.

Though both Anderson and Barnes & Noble, through their agents Magazines.com and Enews.com, tested a number of programs over the past 12 months, the bookseller is first out of the gate with an official launch. A full rollout by B&N could come by next summer.

Last year, the bookseller had performed a limited test run in selected outlets for both its

in-store subscription program and holiday gift program using five Time Inc. titles, including *Time* and *Sports Illustrated*, and four Condé Nast titles, including *Vanity Fair* and *Architectural Digest*. Consumers buying a subscription (at rates competitive with blow-in cards) selected a free issue from the participating titles and

filled out mailing addresses in the store's brochure (the holiday package, which had a separate display, also came with a card, gift paper and a bow). B&N then passed the information on to a fulfillment house, where the subs were quickly processed. The tests went well enough to launch the programs this fall, says Steve Riggio, B&N vice chairman; subscription agent Enews.com, acquired by B&N in April (Time Inc. also owns a stake), will handle the fulfillment.

Beginning this month, the in-store subscription service will be available in 150 B&N stores across the country and will include 200 magazines from all the major publishers. In November, the holiday gift kit will be available in all B&N stores and 100 affiliate B. Dalton Bookseller outlets; 26 magazines have signed on, including Hearst Magazines' *Cosmopolitan* and *Martha Stewart Living* and Time Inc.'s *People*.

But some publishers remain skeptical about the potential of these services. "In-store programs are never successful because

people in stores are not there to buy subs. When they buy magazines, they buy on impulse," says Chip Block, Ziff Davis Media publishing strategist. "And there are so many mechanical problems; the stores want to control the environment, and you have clerks that really don't want anything to do with selling subs." That said, Block is quick to add, "Any retailer that could be successful is Barnes & Noble."

"We sell over \$200 million of magazines in our stores," asserts B&N's Riggio. "The Barnes & Noble retail-store customer is among the best, with [one of the most] lucrative demographics for magazine publishers to reach in all of retail. We not only have competence in the business of retailing magazines, but we also have e-commerce expertise."

Meanwhile, Anderson's 30-title Instant Start program ended in June after six months with mixed results. Consumers purchased special polybagged issues offering instant subscriptions in some 300 stores, including Anderson-owned Books-A-Million and Kroger's supermarkets. Shoppers then filled out their mailing addresses through blow-in cards, an 800 number or online. Though several thousand subs were sold, claims Clarke, "what did not work were the economics for the publisher," he explains. "Even though we sold thousands of subs, it didn't move the needle for a magazine with a 1 million or more circulation." Moreover, the unsold polybagged copies had to be picked up and shredded, and replaced with new polybagged editions.

"There was a great deal of concern by publishers that there would be real confusion of keeping the [polybagged] copies separate in the store from the newsstand copies, and somehow they would be integrated together," says one publishing executive, who requested anonymity. "And there would be miscalculations on the number of copies sold."

Still, Clarke argues that "the notion of selling subscriptions at retail work. Currently, Magazines.com is testing through the holiday season four small programs in supermarkets and bookstores (such as Books-A-Million), including one called Ready, Set, Go. This time there will be no polybagged issues. Instead, retailers will use the existing supply of magazines and a subscription kit that is to be filled out and sent in to Magazines.com—similar to Barnes & Noble's in-store subscription program. —Lisa Granatstein



B&N will have gift kits on display and brochures for ordering subscriptions.

Mediaweek Magazine Monitor

WEEKLIES October 8, 2001

It's been bittersweet for the newsweeklies since the Sept. 11 attacks. While readers have flocked to the stands, advertising has softened considerably. In total, *Time*, *Newsweek* and *U.S. News & World Report* fell 22.86 percent to date. Greg Osberg, *Newsweek's* executive vp/worldwide publisher, says most ads, with the exception of airlines, have started rescheduling missed ads. —Lori Lefevre

	ISSUE DATE	CURRENT PAGES	ISSUE DATE LAST YEAR	PAGES LAST YEAR	PERCENT CHANGE	YTD PAGES	YTD LAST YEAR	PERCENT CHANGE
NEWS/BUSINESS								
BusinessWeek	8-Oct	76.73	9-Oct	134.05	-42.76%	2,905.02	4,519.26	-35.72%
The Economist	29-Sep	58.50	30-Sep	68.00	-13.97%	2,022.50	2,366.50	-14.54%
Newsweek ^E	8-Oct	22.66	9-Oct	52.45	-56.80%	1,249.95	1,719.32	-27.30%
The New Republic	8-Oct	10.50	9-Oct	11.30	-7.08%	338.45	334.80	1.09%
TimeE/®	8-Oct	38.92	9-Oct	73.24	-46.86%	1,706.99	2,097.36	-18.61%
US News & World Report	8-Oct	29.15	9-Oct	44.64	-34.70%	1,058.46	1,388.45	-23.77%
The Weekly Standard	15-Oct	12.50	16-Oct	8.00	56.25%	373.50	368.00	1.49%
Category Total		248.96		391.68	-36.44%	9,654.87	12,793.69	-24.53%

SPORTS/ENTERTAINMENT/LEISURE

AutoWeek	8-Oct	25.93	9-Oct	46.61	-44.37%	1,106.76	1,199.13	-7.70%
Entertainment Weekly	5-Oct	39.10	6-Oct	31.92	22.49%	1,322.77	1,448.92	-8.71%
Golf World	5-Oct	24.00	6-Oct	17.98	33.48%	981.01	1,214.17	-19.20%
New York ^H	8-Oct	43.30	9-Oct	71.20	-39.19%	2,044.20	2,047.30	-0.15%
People	8-Oct	92.95	9-Oct	87.77	5.90%	2,705.09	3,080.76	-12.19%
The Sporting News	8-Oct	7.70	9-Oct	7.80	-1.28%	377.40	476.50	-20.80%
Sports Illustrated	8-Oct	50.36	9-Oct	54.90	-8.27%	1,789.74	2,152.99	-16.87%
The New Yorker ^I	8-Oct	22.74	9-Oct	27.81	-18.23%	1,578.12	1,669.30	-5.46%
Time Out New York	3-Oct	64.44	4-Oct	75.19	-14.30%	2,577.56	2,865.19	-10.04%
TV Guide ^K	6-Oct	48.42	7-Oct	77.69	-37.68%	2,128.46	2,403.56	-11.45%
US Weekly ^L	8-Oct	9.00	8-Oct	24.33	-63.01%	724.52	739.12	-1.98%
Category Total		427.94		523.20	-18.21%	17,335.63	19,296.94	-10.16%

SUNDAY MAGAZINES

Parade ^X	7-Oct	17.06	8-Oct	17.52	-2.63%	455.26	482.74	-5.69%
USA Weekend ^X	7-Oct	12.50	8-Oct	19.03	-34.31%	436.97	452.36	-3.40%
Category Total		29.56		36.55	-19.12%	892.23	935.10	-4.58%
TOTALS		706.46		951.43	-25.75%	27,882.73	33,025.73	-15.57%

E=estimated page counts; X=YTD included an out-of-cycle issue in 2000; 1-one more issue in 2001; 6=six more issues in 2001; @=one fewer issue in 2001; H=10/6/00 issue was Home Design Special

BIWEEKLIES October 8, 2001

Fortune, *Forbes* and *Inc* continue to get hammered. The trio, which already suffered losses early this year when technology ads dried up, is taking another blow as business travel screeches to a halt. Many hotels, including Hyatt Hotels & Resorts, are not expected to resume spending until early '02. —LL

	ISSUE DATE	CURRENT PAGES	ISSUE DATE LAST YEAR	PAGES LAST YEAR	PERCENT CHANGE	YTD PAGES	YTD LAST YEAR	PERCENT CHANGE
BUSINESS/ENTERTAINMENT								
ESPN The Magazine	15-Oct	48.65	16-Oct	70.97	-31.45%	1,035.25	1,215.48	-14.83%
Forbes ^P	8-Oct	184.30	9-Oct	249.71	-26.19%	2,977.74	4,551.71	-34.58%
Fortune	15-Oct	163.70	16-Oct	302.13	-45.82%	3,142.25	5,072.10	-38.05%
Inc ^F	1-Oct	42.70	1-Oct	87.28	-51.08%	742.18	1,299.81	-42.90%
National Review	5-Oct	23.83	6-Oct	26.00	-8.35%	402.17	450.91	-10.81%
Rolling Stone	25-Oct	78.51	26-Oct	81.89	-4.13%	1,207.33	1,472.67	-18.02%
Category Total		498.99		730.70	-31.71%	9,464.24	13,975.40	-32.28%

e=publisher's estimated page counts; F=18 issues per year

Out of Style

CN shuttered *Mademoiselle*

Long known for its practice of sticking with troubled titles, Condé Nast Publications in little over a year has tossed a number of magazines from its closet like last year's Fendi baguette.

Suffering from a schizophrenic voice and plunging advertising pages, *Mademoiselle* became the latest casualty last week. The 66-year-old fashion monthly's demise follows *Women's Sports & Fitness*, which was shuttered in July 2000. Also, *Details* narrowly averted death, having been abandoned by CN

in May 2000. After a five-month hiatus, sister company Fairchild Publications revived the men's monthly.

"It's not unprecedented," notes James Truman, Condé Nast's editorial director. "Obviously, publishing is a dynamic environment, and we are a company that changes. The manifestations of that are essentially no different now than they were 10 years ago." The last spate of CN closures occurred during the early '90s. Short-lived *Woman* clashed with Condé Nast's upscale palette and folded in 1990; *House & Garden* shuttered in '93 but was revived three years later.

Mademoiselle's fate is closely tied to that of *Details*. Both titles went through a series of incarnations—from edgy to mainstream. As for *Mademoiselle*, former British *Cosmopolitan* editor in chief Mandi Norwood gave the book in August 2000 a sassier "girlfriend" tone. But stories like "Make-out Party!" fell flat, and in May Norwood retreated to a mish-mash of a 20-something *Glamour* and *Cosmo*. "For many, many years they had a clear focus, and recently they lost that focus," says Trey Laird, Donna Karan executive vp/corporate creative director. "At the same time, magazines like [Hearst's] *Marie Claire* and [Fairchild's] *Jane* came on really, really strong."

Consequently, the 1.15 million-circ *Mademoiselle's* ad pages suffered badly. Through



No! No! No! The November issue will be the last.

October, the monthly's ads fell 18.1 percent, to 652, reports *Mediaweek* Monitor. November will be *Mademoiselle's* final issue. Subscribers will receive *Glamour* starting in January, which allows *Glamour* that month to hike its rate base by 100,000 to 2.2 million. "When you've got a magazine of over 1 million circulation, you have drastically reduced maneuverability in terms of what the advertising market will put up with, what readers want and what the historical pull of the name is," says Truman. "I did not find a way out of those three forces."

Not that he didn't try. In the late '90s, Tru-

man says he did toy with radically repositioning *Mademoiselle* into the shopping guide that is now CN startup *Lucky*. "We began working on *Lucky* as a replacement format for *Mademoiselle*," he says. In focus groups he learned that "as much as readers were not engaged in *Mademoiselle*, they all spoke about shopping as being the bonding activity between friends." Soon after, Truman notes he and current *Lucky* editor Kim France presented a revamped *Mademoiselle* to CN executives. "But everyone felt that since this was a new kind of magazine it deserved a new title," he says. —LG

Media Person

BY LEWIS GROSSBERGER



The Threat of Errorism

NOW THAT WE SUDDENLY FIND OURSELVES IN A NEW AND

dangerous era, many new and dangerous questions are arising. Your first impulse will be to go to the experts for the answers, but since the experts are always wrong, your sixth or seventh impulse, to go to

Media Person, will turn out to be the correct impulse. Follow that impulse wherever it may lead, even if it's advice like the following:

How do I avoid getting fired for saying something stupid?

The less subtle among us will now assert, in their typically thoughtless manner, that the easiest way is to not say something stupid. But that is the coward's choice, and besides, it is beyond the abilities of most of us in the media. Blurting out stupidities is part of our job and has become a lifelong habit.

About all one can do, then, is delay the blurt. Timing is everything. For instance, never criticize the president or the military the week after a spectacularly vicious enemy attack. This is what did in two columnists on small newspapers (See Romenesko for details) and almost nailed Bill Maher. It wasn't so much what they said as when they said it. On Sept. 10, it was perfectly permissible to splash vitriol all over the Prez, the military, the government. Afterwards, it was a fireable offense, First Amendment or no. In about, oh, another 15 minutes, it will be OK again. To be certain, though, check with Ari Fleischer, the federal official in charge of warning citizens to watch their mouths. Should you jump in too quickly, he could denounce you right from the White House podium, frightening your aged mother, perhaps fatally. Lie low for a while. Take a vacation. Write about sports.

(A somewhat different problem cost Ann Coulter her *National Review* column after the conservative harpy proposed that we reinstitute the Crusades, knock off the leaders of various Islamic countries and forcibly convert the populace to Christianity. To get fired for being too right-wing for the *National Review* is an awe-inspiring feat. Fortunately, most journal-

ists don't have to worry about this kind of dismissal as Ann Coulter is unique.)

How do I protect my family from very uncomfortable warfare of a bio, chemical or nuclear nature?

There has been a great deal of needless anxiety over the possibility of terrorists utilizing what defense specialists term WOUHDMBACs—Weapons of Unbearably Hideous Destructiveness on a Magnitude Beyond Anything Conceivable. *Time* magazine, for instance, just devoted a 64-page article to this alleged threat. The fact is that it is highly unlikely that the terrorists will be able to build and deploy such weapons within the next few weeks. So relax. All you need to do to safeguard yourself and your loved ones from the menace is take these easy steps:

Make sure everyone wears their MV-60

two feet of reinforced concrete.

OK, but once I've done that, how do I protect my computer from terrorist backers?

You get Microsoft's Anti-Terrorist Firewall 2001 (\$149.99 at Bob's Cut-Rate Software, found at all shopping malls everywhere), which when combined with Muhammad's Sword, a habit-forming, real-time strategy game in which you deploy commando teams against incredibly realistic fundamentalist fanatics, will keep you up and running, as well as highly entertained—that is, if you have a kerosene-powered backup generator (\$3,500 at Home Depot).

And how do I safeguard my already reduced—oh, let's face it, pathetic—nest egg?

There are two ways to go. You could opt to invest in stocks, demonstrating your patriotism by showing faith in the dynamic economy of the U.S. The only hard part will be ignoring the whispers of "sucker" coming from the cynical professionals at the stock exchange. Or you could invest all your funds in canned tuna, figuring that the few people you run into when you finally emerge from your refuge in the Andes will be operating on

TO BE CERTAIN, THOUGH, CHECK WITH ARI FLEISCHER, THE FEDERAL OFFICIAL IN CHARGE OF WARNING CITIZENS TO WATCH THEIR MOUTHS.

Israeli Commando Gas Mask (\$215.96 at Rite-Aid drugstores) and ProtecTough Full-Body Hazard Suit (\$1,600 at Sharper Image) 24 hours a day. Stay off planes, buses, trains and boats; avoid bridges, tunnels, crowded highways, theaters and restaurants. Get vaccinated for anthrax, plague, smallpox, Ebola, botulism, tularemia and herpes. If you live in a city, town or suburb, evacuate your home immediately and move to a remote mountain range, such as the Andes. Dig a hole at least 60 feet deep, stock it with enough food and water to last 10 years, plus at least one flashlight, move in and cover the opening with

the barter system.

Never mind all this scare stuff. What's good to watch on TV?

Whew, now you're asking a tough question. So far, Media Person hasn't seen one new show worth talking about. *The West Wing's* special episode was so boring you could faint. And CNN must be avoided because anchor Aaron Brown sounds like Liberace. But not to worry. Hollywood is already mobilizing to meet the challenge of The New Era. Tony Soprano has been ordered to whack bin Laden, and Andy Sipowicz and Drew Carey have pledged their help. It's all gonna work out. ■

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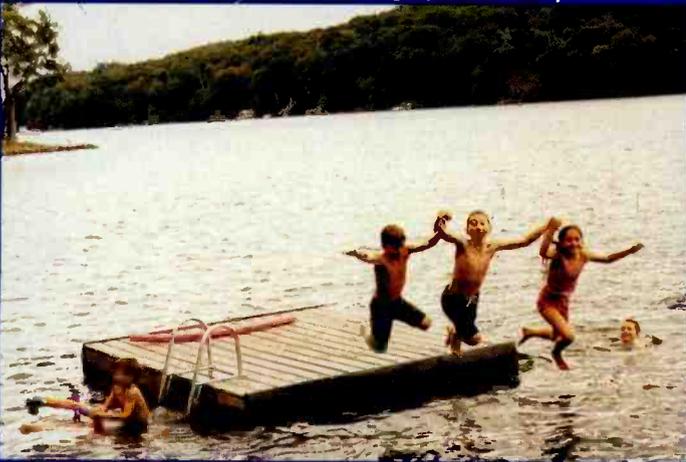


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Wrapping Up Summer September 2001

Photo-graph by Ann Stratton & Ruedi Holmann



MORE READERS!
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"For me, **COUNTRY LIVING** celebrates American living. Country is another word for what is **UNIQUELY AMERICAN**. Like soccer and pizza. It taps into how I live. That's why I always come home to the comfort of **COUNTRY LIVING.**"

ANN GAULOCHE, 42, soccer mom, freelance artist, local golf champ

For more information on why 66% of American women live the casual, comfortable lifestyle, as reported by the Country Living/Yankelovich study *America's Pursuit of Comfort*, contact Steven Grune, publisher, at 212-649-3190.



Come home to comfort SM

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