

MEDIAWEEK

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THE NEWS MAGAZINE OF THE MEDIA

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Share Croppers

Syndicators hope to reap a bigger harvest of upfront dollars this year
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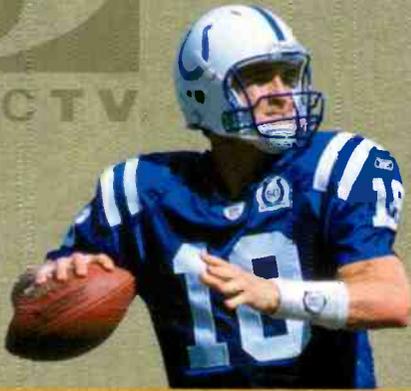
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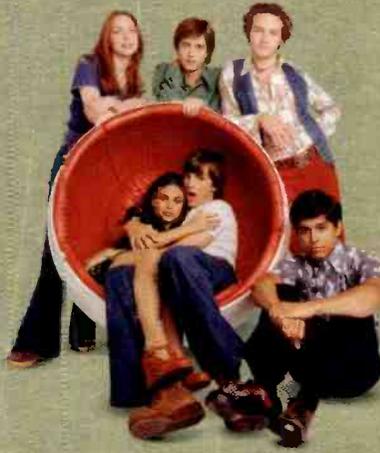
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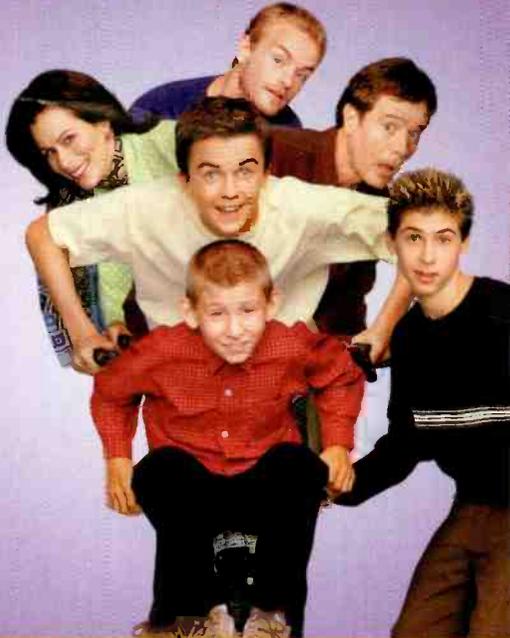
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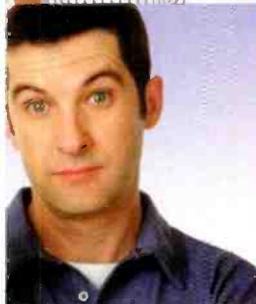


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At Deadline

■ STEWART'S MEDIA EMPIRE IN JEOPARDY

Martha Stewart, who will likely serve prison time after being convicted on March 5 of obstructing justice and lying to the government about a stock sale, could see her media empire suffer greatly, said media buyers. Stewart, who built Martha Stewart Living Omnimedia from scratch, became the doyenne of domesticity, creating a multimedia company that includes a nationally syndicated television show and magazines such as flagship *Martha Stewart Living*. Media buyers speculate that the guilty verdict could have a devastating effect on her syndicated show and magazine properties. "The real concern is whether or not advertisers will want to continue sponsoring *Martha Stewart Living*," said Brad Adgate, senior vp/director of corporate research at Horizon Media. "If they don't, King World is likely to cancel the show." Season to date, *Martha* ranks No. 10 among all talk shows with a 1.2 household rating—off 8 percent from the comparable year-ago period. King World has not issued a statement on the future of the strip. As for her magazine, "readership has declined, as well as advertising pages, before she was proven guilty," said Robin Steinberg, Carat USA vp/print director. "Now those who waited until she was innocent until proven guilty will follow suit. And that will lead to the probable demise of the magazine." *MSL*'s ad pages through March fell 34 percent to 175 versus last year, reports the *Mediaweek* Monitor. Paid circ in last year's second half stayed flat at 2.36 million, according to the Audit Bureau of Circulations. Trading of *MSO* stock was halted March 5. Stewart's sentencing is set for June 17.

■ ESPN SIGNS PACT WITH NCTC

ESPN signed a long-term carriage agreement with the National Cable Television Cooperative (NCTC), which represents more than 6,500 independent cable systems, for ESPN, ESPN2, ESPNNEWS, ESPN Classic, ESPN HD and Spanish-language net ESPN Deportes. As a group, NCTC provides cable service to more than 15 million subscribers nationwide. In announcing the deal, ESPN president George Bodenheimer made note of moderate rate hikes.

■ STATE FARM EXTENDS PAC 10 SPONSORSHIP

State Farm Insurance has extended, through 2007, its title sponsorship for the Pacific 10 Women's Basketball Tournament, which airs on Fox Sports Net. In addition to the title sponsorship, the package includes presenting

sponsorship of all Pac 10 women's programming on FSN. State Farm will air four 30-second spots in all 35 Pac 10 women's events to be telecast on FSN in various sports each year. State Farm also will pay tribute to the outstanding athlete on each telecast under a "Pride of the Pac" on-air banner. The winners will be honored at a luncheon hosted by FSN.

■ CSTV, TW INK CARRIAGE DEAL

College Sports Television (CSTV) has reached a carriage agreement with Time Warner Cable, effective March 8, that will eventually put the fledgling network, currently reaching 15 million subscribers, in 25 markets. CSTV immediately will be available on TWC digital tiers in Detroit; Syracuse, N.Y.; Rochester, N.Y.; Waco, Texas; and Portland, Maine. TWC reaches 10.9 million subscribers, 4.3 million of which are digital subscribers. According to the latest Beta Research study, CSTV was rated the highest in overall interest among all operators for emerging networks. CSTV carries 25 different men's and women's sporting events.

■ **ADDENDA:** Chris Lambiase, who joined *Reader's Digest* as publisher from *SmartMoney* last October, has left the company. No replacement has been named...Dennis Holt, founder of Western International Media—which, in 1994, was sold to Interpublic Group and renamed Initiative Media—opens a new buying service, U.S. International Media (the name of his first media-buying shop in the '60s), in West Hollywood, Calif., on March 8...G+J USA Publishing's Jack Bamberger, most recently executive director of G+J Partnership Marketing, has been promoted to the newly created position of vp/corporate sales and marketing... March 4 was supposed to be the date that Nielsen Media Research turned on its local people meter service in

Los Angeles. But in order to bring its sample more in line with population characteristics, Nielsen delayed the service's launch until April 8. Nielsen's parent is VNU, publisher of *Mediaweek*...TNT has acquired the first-run syndication rights to the ABC drama *Alias* from Buena Vista Television. The multiyear agreement commences in fall 2005.

■ **CORRECTION:** In a news story in last week's issue, *Fortune*'s total circulation was misreported. In second-half 2003, *Fortune* had a circ of 887,935.

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MEDIWEEK

ESPN's Skipper posts big numbers with Web-based subscriptions Page 48

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Market Indicators

NATIONAL TV: ACTIVE
Second-quarter scatter dollars are coming in at a slow but steady pace, with more packaged goods, computer/technology and fast-food companies jumping into the fray.

NET CABLE: MOVING
As scatter business moves into second quarter, things appear healthy for sellers. Pharmaceutical, wireless and studio (theatrical releases and DVDs) money continue to drive the market. Clients buying avails closer to air date.

SPOT TV: MIXED
Political still slow but market is picking up, driven by steady activity from autos, telecom and movies. Home-improvement advertisers such as Home Depot starting to kick off spring campaigns.

RADIO: AVAILABLE
March is unusually sluggish and plenty of inventory is available at negotiable rates. Advertisers placing campaigns very close to air date. Active categories include automotive, telecom (wireless), retail, financial and fast food.

MAGAZINES: ACTIVE
Parenting books are looking at healthy second quarter. Brisk business seen from adult cosmetics and toiletries, kids apparel, pharmaceuticals and snack foods. Direct response and autos are slower to spend.

House Committee Supports \$500,000 Indecency Fine

A U.S. Senate panel this week takes up legislation to combat broadcast indecency, following action by a key House committee that voted to raise the maximum indecency fine to \$500,000—up from the current \$27,500.

The Senate Commerce Committee on March 9 is to consider a bill offered by Sen. Sam Brownback (R-Kan.) that would raise fines to \$275,000—the amount contained in parallel House legislation until March 3, when the Commerce Committee, in a 49-to-1 vote, approved the higher fines.

House members said their bill, which also would require regulators to consider license revocation for repeat indecency offenders, is aimed at encouraging compliance by media giants with billions of dollars in revenue. Their version would shield radio and TV broadcasters not owned by networks from fines for live programming or programming they've not had time to review.

Meanwhile, leading radio company Clear Channel on March 4 paid a record federal fine of \$755,000 for indecency violations committed in broadcasts during 2001 by Florida DJ Todd Clem, known as Bubba the Love Sponge. The Federal Communications Commission is expected to issue fines against other companies. Brownback asked Viacom CEO/President Mel Karmazin to explain why Viacom unit Infinity Broadcasting was still airing entertainer Howard Stern, whom Brownback accused of recently airing “despicable racist language” and indecent content. —Todd Shields

Under Fire, Eisner Loses Role as Disney Chairman

Michael Eisner's decision last week to relinquish his role as chairman of the Walt Disney Co. (but stay on as CEO) failed to satisfy shareholders who continued to call for his removal and pleaded with the company's board to put a succession plan in place.

Eisner faced a wave of shareholder dissent at a March 3 annual shareholder meeting in Philadelphia over his management of Disney. (continued on page 8)

ABC Turnaround Not That Simple

Few bright spots on schedule blurred by overall ratings disappointments

NETWORK TV By John Consoli

Michael Eisner is not the only Walt Disney Co. executive under the microscope. As ABC finds itself mired in fourth place in key prime-time demographic categories season to date, ABC entertainment chairman Lloyd Braun and entertainment president Susan Lyne are being closely watched by the media-buying community—which, based on the network's program development for next season, will determine whether they will again cumulatively commit to spending the \$1.7 billion on ABC that they did in last year's upfront or place some of that money elsewhere.

Some ABC affiliates—which have taken revenue hits because of the network's inability to program successful dramas at 10 p.m., leading into late local newscasts—joined the chorus of critics. One frustrated general manager of an ABC affiliate said ad dollars derived from local prime-time inventory now make up only 25 percent of overall station revenue, down from 35 percent when the network was firing on all cylinders in the mid-'90s. “We've been getting whacked at 10 o'clock,” complained the gm. “[ABC's] West Coast [programming] people are polite, they listen to what we have to say, but we haven't seen them really fix anything.”

Media buyers and ABC affiliates give the

programmers credit for developing some successful comedies. But even though veteran sitcoms *Eight Simple Rules*, *According to Jim* and *My Wife & Kids* all generate at least a 4.0 rating in adults 18-49, and the network season to date ranks first or second in 64 percent of the prime-time half hours in the demo, the only sitcom whose ratings are up over last year is *Less Than Perfect*, airing Tuesdays at 9:30.

“There is just no buzz around any of the ABC shows,” said Stacey Shepatin, senior vp/director of national broadcast at Hill, Holiday. “Even though most of the other networks are showing declines, there is a buzz about some of their shows. ABC does not have a franchise drama producer like NBC with Dick Wolf or CBS with Jerry Bruckheimer. The WB, although its shows are declining, still has an attractive young audience base, and NBC, despite its problems, is still No. 1 in 18-49. Fox has *American Idol* and *The O.C.*”

ABC has even struggled a bit in the arena of reality/variety. While Fox is scoring big numbers again with *American Idol* and even sixth-place UPN is seeing record ratings numbers from *America's Next Top Model* (see story on facing page), ABC's latest installments of *The Bachelor* and *The Bachelorette* were both off from last season's impressive ratings.

ABC's Braun acknowledged the problems. “None of our shows are sledgehammers yet. We don't have a mega hit to turbocharge our



Holding their own: ABC's sitcoms, including *Less Than Perfect*, have fared better than the net's dramas this season.

schedule," he said. But, Braun added, with nine of the network's 10 sitcoms ranking either first or second in their time periods in adults 18-49, the network can now turn its attention to drama development.

Lyne said outside of Wolf's *Law & Order* series on NBC and the Bruckheimer dramas on CBS, all networks have struggled to develop quality scripted hours. ABC is hoping that midseason drama *Kingdom Hospital*, which opened with a first-place 5.5 rating/14 share among adults 18-49 in its two-hour March 3 premiere, and the upcoming four-episode run of *The D.A.* could be a start. "Not every show needs to be a blockbuster, but we do need one breakout hit," she said. "The fact that we don't is keeping us in fourth place right now."

Lyne believes targeting women in future dramas could be the answer. The network was successful in going back to its roots to develop family sitcoms, and Lyne feels putting on more female-oriented family dramas like past ABC hit *thirtysomething* could be a start in that direction.

Last season at this point, ABC was tied for second place with Fox in delivery of adults 18-49 but is now fourth, down 14 percent. It is also tied for third with older-skewing CBS in the 18-34 demo.

What does all this mean to upfront media buyers? Most would like to see ABC develop some quality new dramas by upfront time in mid-May. "It will be important to see their development and how the rest of the season plays out," said Larry Blasius, executive vp/director of media negotiations at Magna, echoing the sentiments of many buyers. "ABC may not be doing that well right now, but by the time the upfront comes, it could be an attractive option to some other network. It's not the only network [whose] ratings [are] challenged."

Andy Donchin, senior vp/director of national broadcast at Carat, acknowledged that "ABC needs to put more hits on the air," but he said that ABC will fare better if more dollars are working in the marketplace. If there's less demand for network inventory, ABC could end up less top-of-mind to buyers. "It will also depend on how ABC prices itself relative to the other networks," added Donchin.

Another, more cautious media buyer, who did not want to speak for attribution, said that ABC could still get a sizable chunk of upfront ad dollars because some buyers will not want to take the chance of angering ABC sales execs, for fear of retaliation when the network turns around its fortunes. "There will always be a time down the road when you might want to get a client in a hot show, and if you overly screwed a network in the past, you may not be able to get in," said the buyer. ■

Model Struts for UPN

Net has solid Feb. sweeps thanks to reality show; NBC, CBS share top spots

NETWORK TV By John Consoli

The ability of one show to propel a broadcast network significantly up or down in ratings was never more evident than in last month's February sweeps. Thanks to *America's Next Top Model*, which ran twice (an original and a repeat) each week, UPN ended up the only network during the sweeps to register ratings gains in households, viewers, and adults 18-34 and 18-49.

On the flip side, Fox—which did not reap the benefit of *Joe Millionaire*, a show that performed so well for the network during the February 2003 sweeps—posted double-digit declines across the board. And that's with *American Idol* in its lineup.

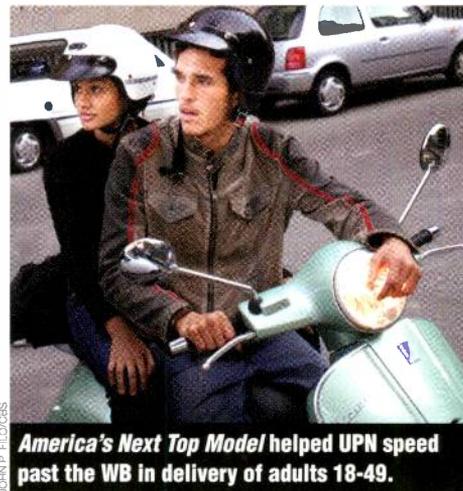
The February sweeps also showed how popular reality shows on a given night can shift viewing patterns dramatically. As Steve Sternberg, executive vp/audience analysis at Magna Global USA, pointed out, Mondays replaced Sundays as the most-watched night of the week during the sweeps, thanks to strong reality performers *Fear Factor* on NBC and Fox's *My Big Fat Obnoxious Fiancé*. On Thursdays, NBC's run of *The Apprentice* grew its 18-49 ratings 33 percent, helping make that night rank second in viewing. Tuesday and Wednesday nights, with Fox's *American Idol* attracting TV crowds, also moved up on the cumulative TV viewership totem pole. Sunday, with little reality, fell to fifth.

"Reality helped boost broadcast usage by drawing over traditional cable viewers," Sternberg said, "because today, most viewers look at individual programs, not networks."

Brad Adgate, senior vp/director of corporate research at Horizon Media, said the heavy draw of younger viewers to reality shows could indicate that the genre is replacing sitcoms as their favorite program choice.

Aside from the continued cementing of reality as a solid programming platform, the February sweeps yielded little in the way of surprises. CBS, which won last year's February sweeps in both households and viewers, did so again, while NBC again won in adults 18-49. In fact, NBC and CBS both ended up with the same 18-49 ratings as they did last February—4.8 and 4.2, respectively. CBS also attracted the same total number of viewers, 13.9 million, as last February.

Sternberg said CBS, both in the February sweeps and season to date, is "becoming more and more of a competitive force because it has



America's Next Top Model helped UPN speed past the WB in delivery of adults 18-49.

remained fairly stable when compared to last year, while the other networks are declining. CBS has the most stable schedule and is targeting total viewers rather than playing the demo game. When you bring in lots of total viewers, you are less affected when one particular demo group, like young men, starts to tune out."

Despite its monstrous nonscripted hit *American Idol*, Fox found itself down 20 percent in viewers and 26 percent in adults 18-49. The WB—already suffering through a season it would like to forget—also shrank during the sweeps, with total viewers off 12 percent and adults 18-49 down 20 percent. In fact, UPN surpassed the WB in delivery of adults 18-49 in February (1.7 to 1.6) after trailing 1.5 to 2.0 last year.

The difference maker for UPN was *Top Model*—its Feb. 24 episode actually broke into the top 20 broadcast network shows in adults 18-34 (4.5) and ranked 31st in adults 18-49 (3.8), beating original episodes of NBC's *Frasier* and *Scrubs* in the Tuesday 9-10 time period.

ABC's soft sweeps performance was masked by its huge Academy Awards telecast on Feb. 29, the last Sunday of the sweeps. The show drew 43.5 million viewers, a 15.3 in adults 18-49 and a 12.3 among adults 18-34, tripling the ratings of the network's regular programming. The Oscars alone were enough to make the network the leader in all demos on Sunday nights for the entire sweeps. Despite that shot in the arm, ABC was still off a hefty 10 percent in its 18-49 sweeps average, falling to a 3.6 from a 4.0 in February '03. ■

Media Wire

Investors withheld a considerable 43 percent of the vote from Eisner, moving the Disney board of directors to split the CEO and chairman positions. In a move that appears largely cosmetic, Eisner will remain CEO while former Sen. George Mitchell, an Eisner ally who sits on the Disney board, becomes chairman. "While making this change in governance, the board remains unanimous in its support of the company's management team and of Michael Eisner," a board statement said.

Shareholder dissatisfaction with Eisner was spurred by Roy Disney, ex-board member and nephew of company founder Walt Disney. Disney was asked to leave the board last fall due to his age (77).

Eisner's position became even more tenuous in mid-February, when cable giant Comcast made a hostile bid to take over the company. The \$49 billion bid was rejected by the board as insufficient. It is unclear what action Comcast will take next. —Megan Larson

Brewster Asks Court for Protection Against G+J

Dan Brewster, the former president/CEO of G+J USA Publishing, has filed papers in New York State Supreme Court in Manhattan seeking a court order to prevent G+J from bad-mouthing him to the press and to retrieve documents currently in the hands of the company's lawyers.

The move comes as Brewster prepares to file his request for arbitration over compensation. He claims that if he does not receive a temporary injunction, his "reputation will be so damaged that it will be impossible for him to secure any work in the industry," or elsewhere. A G+J spokesperson declined comment.

Brewster was fired last month by G+J International president Axel Ganz following revelations of inflated circulation estimates for *Rosie* (and *YM*), which came to light last fall during the G+J/Rosie O'Donnell trial. The cause of his firing was said to be gross negligence (*Mediaweek*, Feb. 9).

Meanwhile, G+J released an internal circulation review, conducted last fall by Magellan Media Consulting Partners. The audit sug- (continued on page 10)

Nielsen Speeds DVR Data

Will include time-shifted viewing info by 2005 as cable rolls out recorders

RESEARCH By Katy Bachman

Nielsen Media Research last week announced plans to include time-shifted viewing from digital video recorders (DVRs) into its ratings starting July 2005, a year sooner than originally scheduled. Because DVRs are



Frank needs to know impact on viewing.

found in only 3 percent of TV households, Nielsen has been unable to include a single DVR household in its TV sample—a cause of great concern among its clients. And as major cable operators aggressively market DVRs to subscribers, many forecasters now predict the number of new

devices in TV homes could double by the end of 2004 and approach one out of every five homes by the time Nielsen's plan kicks in.

"The longer we wait, the more of a problem it will be to integrate [DVR households] in the ratings," said Jack Wakshlag, chief research officer for Turner Broadcasting System.

Nielsen's change in strategy represents a radical shift in the design of its TV services. To pull it off, Nielsen has to alter how it prompts people to push buttons on its meters, going from reminders when the channel changes to reminders after a set period of time. The company also has to overhaul its data-processing systems in order to report time-shifted viewing that occurs within a seven-day period. The trade-off for the industry: Nielsen, which is

owned by *Mediaweek* parent VNU, must delay by one year the launch of the much-anticipated A/P meter, which, except for DVRs, was designed to handle new TV technologies that are proliferating in U.S. households.

Compressing all those changes into one year doesn't give media companies a lot of time to compare ratings results produced by the old and new methodologies. "We absolutely have to know if there will be an impact on viewing before we begin negotiating next year's [2005-06] upfront marketplace," said Betsy Frank, MTV Networks executive vp/research and planning.

While media companies are pleased they will finally be getting credit for viewing Nielsen has been unable to report, agencies are concerned that Nielsen will not be accounting for commercials that may be skipped. "It's a step in the right direction, but they're missing the whole point. The reporting on time-shifting data will be at the program level, not at the commercial level," said Richard Fielding, Starcom vp/director of insights and analytics.

"It's like putting a Band-Aid on a 12-inch gash. By adding adding more program data, Nielsen is inflating the data, which is less predictive of how many people watch commercial pods," said Adam Gerber, senior vp/director of strategy and innovation for MediaVest.

"At this point, we don't do commercial ratings. There are a lot of things that might be incorporated later," countered Nielsen representative Anne Elliott. "We accelerated this plan by a full year, and there are some things we are not ready to add." ■

Two-Horse Race Begins

Univision and NBC's Telemundo face off for share of Spanish TV ad spending

NETWORK TV By John Consoli

In hot pursuit of more than \$900 million advertisers are expected to commit to Hispanic TV in this year's upfront, Univision and an increasingly competitive Telemundo (backed by NBC) have each rolled out new marketing pitches designed to capture as much audience share and ad dollars as possible.

The Univision presentation, based on a study of Hispanic TV viewers that Nielsen

Media Research performed for it, is aimed foremost at drawing more advertisers into Spanish-language TV. Univision is confident that once it can get advertisers to begin airing commercials in Spanish, it can, as the network with the largest ratings and audience share, capture a majority of those new dollars.

Meanwhile, Telemundo is focusing on its integration with sibling NBC and stresses the

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viewer inroads it has made in the past year and why it is a more viable alternative to Univision than ever before.

The Univision presentation “confirms that advertising to Hispanics in Spanish is more effective than in English,” said Tom McGarrity, co-president of network sales for Univision. “Regardless of age, participants described Spanish-language television as offering more feeling, more heart and more energy than English-language television.”

Specifically, the presentation points out that 58 percent of Hispanics prefer speaking Spanish at home, that 52 percent of Hispanic viewers frequently get information for making purchase decisions from commercials on Hispanic TV, and that 84 percent of Spanish-language TV viewers are more likely to buy a product advertised on Spanish-language TV.

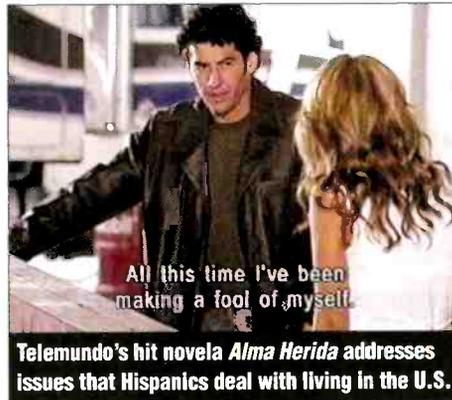
Dennis McCauley, co-president of network sales for Univision, said the network now gets about 140 advertisers to buy in the upfront. The goal of the presentation, he adds, is to grow that number closer to the English-language broadcast number, exceeding 250.

Telemundo has increased its prime-time, weekday, 18-49 demo ratings by 52 percent since February 2003, albeit off a low base, to 3.5 from 2.3, and is now producing 75 percent of its own programming, twice as much as in 2002 and four times as much as in 2001. It also says it has increased its prime-time audience share in the 18-49 demo by 7 percent to 24 percent, at the expense of Univision. Telemundo touts its growing percentage of U.S. TV viewers of Mexican heritage, which is the nation's largest Hispanic TV audience. About 75 percent of Telemundo's audience is now Mexican,

compared to 48 percent last year.

Ramone Escobar, executive vp of programming for Telemundo, said the advantage of the network producing most of its own programming, particularly its novelas, is that it can tailor it to the real-time, real-life concerns of its viewers. “Univision airs novelas from Televisa that are made for audiences outside the U.S.,” he said. Escobar cites Telemundo's novela *Alma Herida*, which he said recently included portions of a speech made by President Bush on immigration laws.

Escobar said the integration with NBC has



enabled Telemundo to expand its programming staffs and to do joint casting calls with NBC-produced programming.

“We are fighting habit and custom in trying to take viewers away from Univision,” Escobar said. “Mexicans come to the U.S. with an awareness of the Televisa brand. But we are making slow, steady strides. *Alma Herida* has grown the 9 p.m. time period 17 percent over last year in [adults] 18-49.” ■

Berning Turns Up the Heat

Resets team to focus more firepower on agencies and integrated marketing

AD SALES By Megan Larson

A&E Television Networks has been weighed down by some media buyer dissatisfaction in the last few years, but Mel Berning, AETN's new executive vp of ad sales, aims to change agency perception—at least in terms of how the network group does business.

In preparation for this year's upfront sales season, and with a goal of improving its integrated marketing strategies, Berning restructured the ad sales division last week and promoted Midwest sales vp Macie Huwiler to vp/national ad sales and former marketing and research exec Melinda McLaughlin to senior vp/integrated sales and marketing. “Apart from

the fact that these are terrific people who deserve to be promoted, this move is about getting more firepower out to the agencies,” Berning said. “This is a signal that we want to play in this [integrated-marketing] space.”

Rob Edney and Brian Granath were promoted to vps in charge of Eastern region ad sales and Mike Peretz was upped to vp/pricing and planning. Diane Donahue, vp of ad sales/Eastern region, left to seek other opportunities. AETN includes A&E, The History Channel and The Biography Channel.

“The big issue we have, and I learned this at MediaVest, is that advertisers need to drive

gested the circulation woes occurred because of “a decentralized management structure and the absence of checks and balances.” Moreover, in reviewing figures audited by the Audit Bureau of Circulations, the report found that out of 97 issues—the total number of magazines published in 2002 by all G+J titles—16 had variances of 2 percent or greater on total circ (any variation above 2 percent is noted by ABC). *YM* and *Rosie* accounted for nine of the 16 misses. In first-half 2003, ABC audits show that of the 42 issues published, only two recorded variances 2 percent or greater. —Lisa Granatstein

Turner Unveils New Slate of Programming for TBS, TNT

TBS Superstation is facing a rebranding effort yet again. By dropping Superstation from its name and picking up a new tagline, Very Funny, TBS is shaping up to be a comedy channel of sorts. Executives declined to discuss the new direction of TBS until next month's upfront presentation, but Mark Lazarus, president of Turner Entertainment Group, last week unveiled an ambitious slate of programming for both TBS and TNT. TBS will get a dose of reality while TNT will stick to producing original dramas.

Complementing its schedule of acquired sitcoms *Friends* and *Seinfeld*, TBS is launching two new reality series and developing five more. TBS executives are working with *Gilligan's Island* producers Lloyd and Sherwood Schwartz to produce a reality-based version of the classic sitcom this fall. Also, a relationship series from Bruce Nash Entertainment (*Meet My Folks*) will launch this summer on TBS.

In development: two hidden-camera shows and an untitled series from *Sex and the City* author Candace Bushnell in which single girls go on the prowl for Mr. Right. (The HBO series premieres in a less-salacious form on TBS this fall).

TNT is in development with two major studios to produce series pilots. New original movie projects include *Clandestine*, a film-noir cop story based on a James Ellroy novel, and a contemporary adaptation of the 1967 Warner Bros. thriller *Wait Until Dark*. —ML

brand objectives," said Berning, who arrived two months ago from his post as president/U.S. broadcast at MediaVest. "We need to listen to that and match their brand with our brand; we can't just stick product in a show or sell a schedule of 30-second spots."

Berning and his team are currently working to bring in advertisers on The History Channel's presentation of Steven Spielberg's *Band of Brothers*. It is the first time the 10-part mini-series will run on ad-supported television since it premiered on HBO in 2001, and THC has secured Jeep, Cisco and UBS Warburg as sponsors. "*Band of Brothers* is a terrific property and

we are hoping to create association with the [advertisers] using interstitials, wraparounds and other promotional tools," he said.

So far, Berning has made a good impression on some agency execs who previously were underwhelmed by AETN sales.

Kathryn Thomas, associate director of Starcom Entertainment, who has criticized AETN's past ad-sales efforts, said she's already seeing improvement, to the point where she is working on a deal whose details she declined to reveal. "The fact that A&E is making anything happen is something, so my experience with [Berning] to date has been top-notch." ■

School of Rock

MTVu appeals to young viewers, advertisers with multiplatform approach

CABLE TV By Megan Larson

Super-sized fries didn't last at McDonald's, but perhaps the super-niche network will work for MTV as it seeks to embrace the college-educated slice of its audience with the month-and-a-half old MTVu.

While MTV and MTV2 have pretty much cornered the market on the TV audience aged 12-30, MTVu is designed to serve the college student in the 18-24 range, and the advertisers that want to reach them. "MTV needs additional touchpoints to secure the loyalty of its viewership," said Kathryn Thomas, associate director of Starcom Entertainment. "It keeps the MTV brand relevant to the viewer and the advertiser."

What separates MTVu from MTV, said MTVu general manager Stephen Friedman, is that it is a resource for college students with news, career counseling and grad-school advice as well as fashion points. Yes, there is plenty of music, though the bands that appear on MTVu won't likely appear on MTV anytime soon.

The network's modus operandi is to hit its

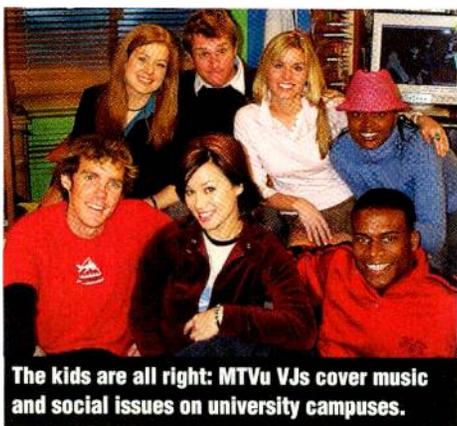
audience—and the advertiser—on three levels: on-air, online and off-channel.

"We see MTVu as a laboratory for students and advertisers to figure out how to reach this group in a unique way," said Carolyn Everson, a former Primedia vp who was named director of ad sales last month.

For example, the network makes some of its edgier music videos available to download online at www.mtvu.com, then lines up those bands to appear at certain schools. Advertisers such as the consulting firm Accenture, which seeks to recruit college seniors, can get exposure on all three platforms. "Students pack 36 hours of activity into a 24-hour period," said Everson, who previously ran Primedia's Teen Internet Group. "If you don't try and reach them online, on-air and outside their dorm-room window, you will miss them."

MTVu offers advertisers off-channel sponsorship opportunities called "activity villages." One recent village, for the U.S. Army, included a climbing wall on campus. For the net's upcoming spring-break coverage in Panama City, Fla., advertisers including Procter & Gamble and K-Swiss will have grass huts at the epicenter of the student bacchanalia.

The network, which was purchased as College Television Network in 2003 and relaunched as MTVu on Jan. 20, is available to about 6 million students at 720 schools. Most of its programming is offered as short briefs, reflecting students' peripatetic lifestyles. The only long-form programming, acquired from MTV, can be seen 11 a.m.-2 p.m. "The 18-24-year-old is hard to reach," said Thomas. "So anytime a media entity can provide an opportunity to reach them, we are interested." ■



The kids are all right: MTVu VJs cover music and social issues on university campuses.

COURTESY MTVU

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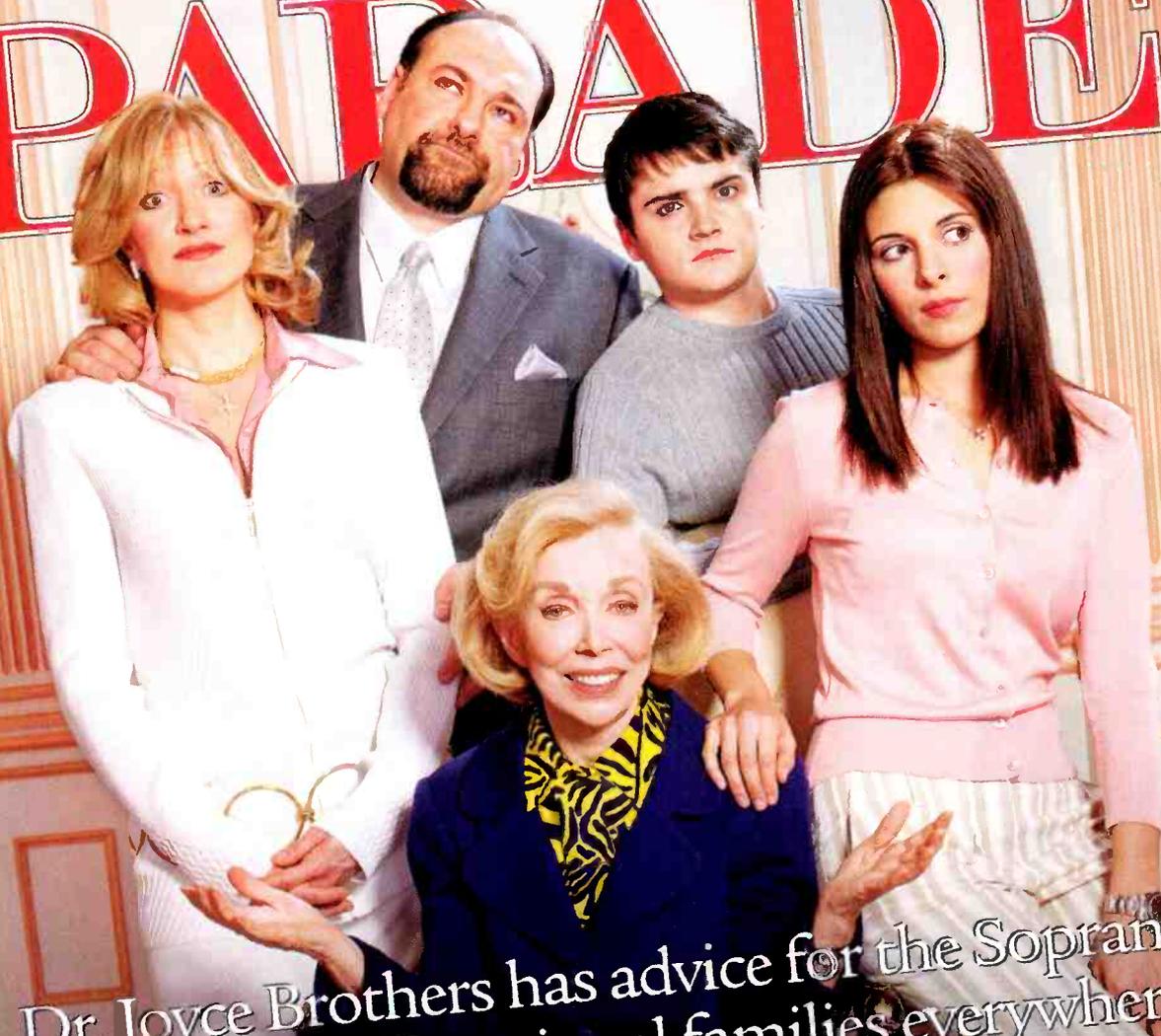
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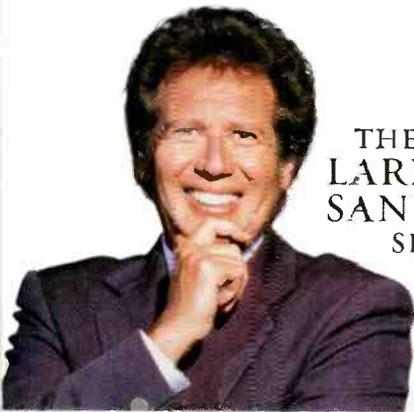
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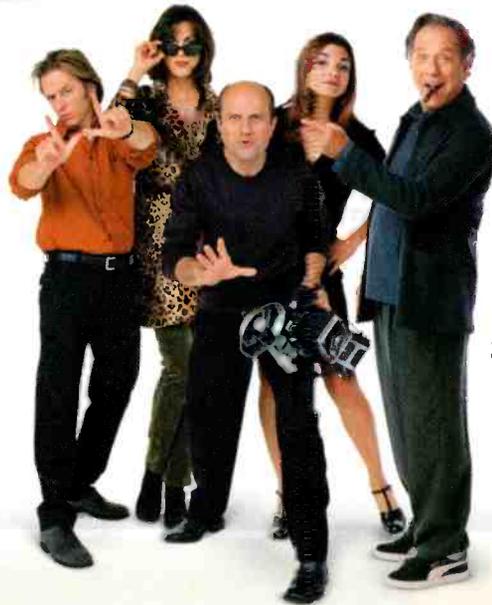


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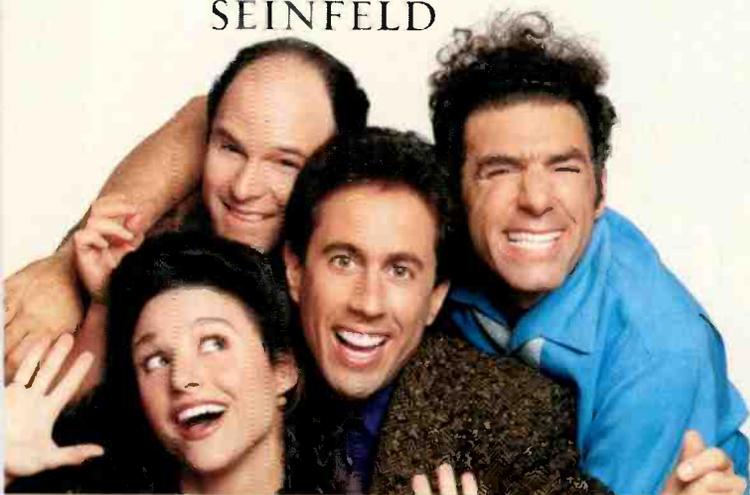


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RADIO STATIONS

As Salem Adds Conservative Talk in Philadelphia, Dallas...

BY KATY BACHMAN

Salem Communications, the radio broadcaster known primarily for carrying brokered Christian Teaching/Talk on the AM band and its Contemporary Christian "Fish" format on the FM band, is taking significant steps to be a serious player in mainstream News/Talk radio.

On April 5, the Camarillo, Calif.-based company will launch three new News/Talk stations, two of them in top-10 radio markets: KSKY-AM in Dallas, WNTP-AM (formerly WZZD-AM) in Philadelphia and WITR-AM in Baltimore (the No. 19 market). It also will launch a nationally syndicated morning show, *Morning in America*, hosted by William Bennett, the former Secretary of Education and co-director of Empower America. The moves bolster Salem's Talk efforts by giving its Conservative Talk format a presence in four top-10 markets. The company also fills a glaring hole in its network lineup.

"There isn't a lot of morning-drive syndication out there," said Greg Anderson, president of Salem Radio Network, which syndicates Talk personalities such as Mike Gallagher, Dennis Prager, Michael Medved and Hugh Hewitt, as well as a news

service, SRN News. With the addition of Bennett's morning show, SRN now offers a seamless lineup from 6 a.m. to midnight.

Bennett, who is also a frequent guest commentator on the Fox News Channel, will broadcast live 6 to 9 a.m. from Washington, D.C., and be heard on Salem's two new Talk stations as well as Salem's other News/Talk stations in Los Angeles, Boston, Atlanta, Denver, Phoenix, San Diego and Minneapolis. Many of the company's other nationally syndicated personalities, such as Gallagher (9 a.m. to noon),

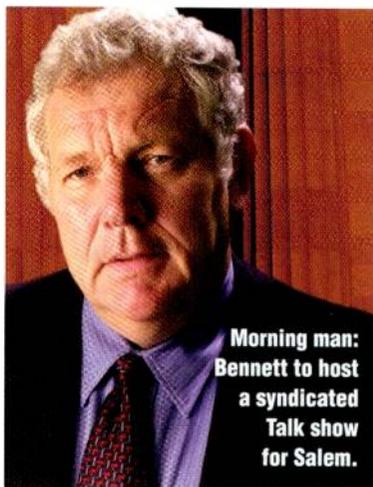
Prager (noon to 3 p.m.), Medved (3 to 6 p.m.) and Hewitt (6 to 9 p.m.), will fill out the lineup on KSKY and WNTP. "Even though Bennett has not hosted a radio show, he has staying power," said Tom Tradup, Salem's national program director of News/Talk and Bennett's co-host. "He has access to Hollywood people, sports people, he's buddies with Mario [Cuomo]. This won't be the Heritage [Foundation] C-Span hour in the morning."

Since July, when Tradup joined Salem, the company has turned on four News/Talk formats: in Boston (WTTT-AM); Atlanta (WGKA-AM); Colorado Springs, Colo., (KZNT-AM) and Jacksonville, Fla. (WJGR-AM). With the two new stations, 17 of Salem's 92 stations will program News/Talk. "Our goal is to have News/Talk stations in each of the top 25 markets," Tradup said.

But News/Talk is also one of the most programmed formats. In the top four markets, Salem's entry will be at least the fourth mainstream Talk format on air. In L.A., Salem's KRLA-AM—ranked No. 30, with a 0.9—is one of five mainstream Talk stations. Despite a growing field, Salem is confident its brand of Conservative Talk can find a niche, even in a

largely Democratic city like Boston. "Somebody pulled all those levers that elected Mitt Romney, the Republican Governor of Massachusetts, and those folks will find WTTT very compelling," said Tradup.

And because Talk is a "foreground" format, advertisers tend to buy several stations. "If you have an adults 35-64 product, you'll buy several deep in the market. So even though the audience may be small, it may be perfectly suited," said Kim Vasey, senior partner and director of radio for Mediaedge:cia.



Morning man:
Bennett to host
a syndicated
Talk show
for Salem.

NEW YORK RADIO STATIONS

...Liberal Net Hits N.Y.

Progress Media, owner of the emerging liberal-oriented radio network recently dubbed Air America, will announce next week that it will clear its programming on WLIB-AM in New York, owned by Inner City Broadcasting. According to sources, Progress Media will lease time on the station with an option to purchase the station at a later date. Air America is also close to finalizing a deal with Janeane Garofalo, who will join fellow comedian Al Franken in the lineup. Progress Media declined comment.

New York represents the third top-10 market clearance for Air America, which announced in January it would lease time on Multicultural Broadcasting's WNTD-AM in Chicago. The New York-based network has also inked a similar lease with Multicultural for KBLA-AM in L.A. and is getting close to finalizing details for a signal in San Francisco.

By the time the network's New York City-based studios are built out by the end of this month or early April, Franken and the rest of Air America's lineup will clear four of the top 10 markets. Franken and co-host Katherine Lanpher are expected to go head to head with conservative rival Rush Limbaugh, radio's No. 1 Talk host, in the noon-to-3 p.m. slot in New York and Chicago. —KB

BOSTON TV STATIONS

Nielsen, Trib Set Pact

Nielsen Media Research last week signed an eight-year agreement with Tribune Broadcasting covering local ratings for all of Tribune's 26 TV stations. Eight of the stations are in top-10 markets where Nielsen, which is owned by *Mediaweek* parent VNU, has announced plans to roll out local people meters.

Effective immediately, WLVI-TV, Tribune's WB station in Boston, will receive local people-meter data, ending 22 months without ratings. Boston was the first local market to be measured using local people meters. When the service started up in May 2002, several stations, including WLVI, refused to sign. WLVI was the last remaining holdout in the market.

Last February, Nielsen announced plans to introduce local people meters in the rest of the top 10 markets. New York, Los Angeles and Chicago are slated to roll out later this year. Local people meters will hit the six remaining markets in 2005 and 2006. —KB

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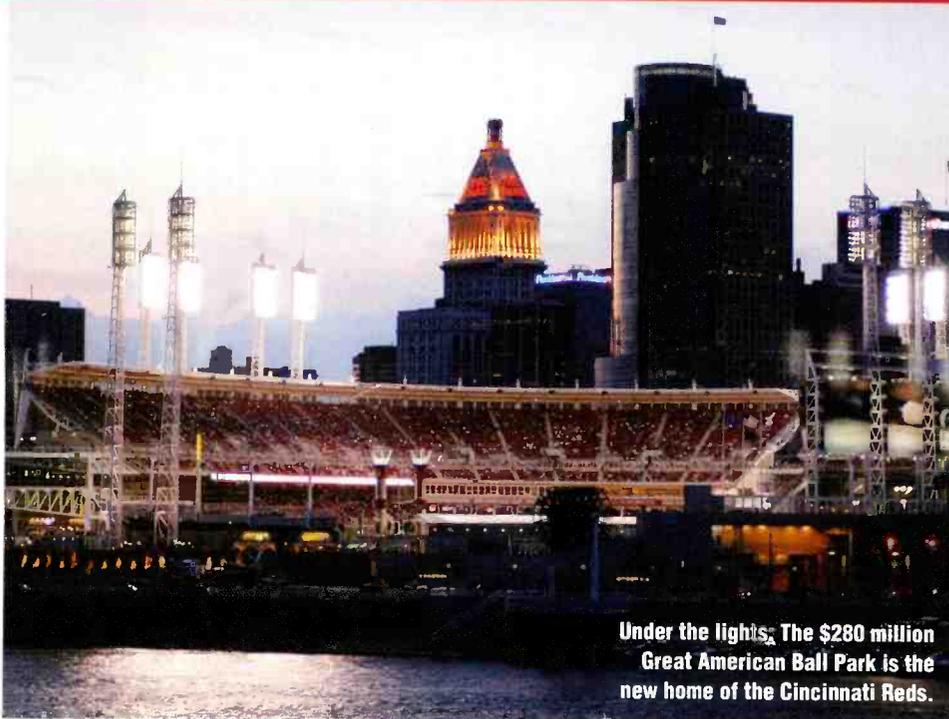
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market profile

BY EILEEN DAVIS HUDSON



Under the lights, The \$280 million Great American Ball Park is the new home of the Cincinnati Reds.

TOM UHLMANN/PHOTO

Cincinnati

WITHIN THE PAST TWO YEARS, THE LOCAL TV NEWS RACE HAS GREATLY INTENSIFIED IN Cincinnati, a market that spans 24 counties in southern Ohio, northern Kentucky and southeastern Indiana. Clear Channel TV's CBS affiliate WKRC-TV had been the longtime news leader in every daypart

in Cincinnati—the nation's No. 32 TV market, with 872,330 households—until July of last year. WKRC's rivals doggedly pursued the station and Scripps Howard Broadcasting's ABC affiliate WCPO-TV finally caught up, winning the evening-news race at 5, 5:30 and 6 in households and some demos for the first time in the July 2003 sweeps—and confirming its new leadership position with a November sweeps victory. "It's still a very, very competitive news market," says Bill Fee, WCPO vp and general manager, adding, "The playing field has really leveled."

Fee says he concentrated on improving his station's evening news because "we realized that was the competitor's [WKRC's] most vulnerable daypart." The station has also benefited from a resurgence in *The Oprah Winfrey Show*, its

evening-news lead-in at 4. Among its improvements, WCPO launched a new 360-degree news set and graphics, along with new areas of focus for its news, including health and child advocacy, says Fee.

Last month, WKRC rebranded itself as Local 12, replacing its decade-old identifier A New Generation of News, says Christopher Sehring, WKRC vp/gm. The new tag reflects "a renewed emphasis on our commitment to

localism," he says.

WKRC remains No. 1 in morning, noon and late news, the latter helped by CBS prime-time programming. "We were the No. 1 CBS prime station in the country in November out of all metered and nonmetered markets, says Sehring. Cincinnati is also one of the strongest markets in the nation for the network's hit shows *Survivor* and *CSI*.

However, the relatively weak performance by CBS soap operas in the market has hurt WKRC's evening newscasts. The station produces the market's only 4 p.m. news, which is followed by *Inside Edition* at 4:30, leading into its 5 o'clock news. Still, Sehring acknowledged his competitor's tenacity. "The strength of the competition makes us better," he says.

On March 13, WKRC will launch the market's first and only Spanish-language newscast. The half-hour show will air on weekends at 5:30 a.m. WKRC has hired bilingual talent for the taped newsmagazine show, called *Nuestro Rincon* (*Our Corner*).

Hearst-Argyle TV's NBC affiliate WLWT-TV is "in a rebuilding process," says Richard Dyer, WLWT president/gm, who arrived at the station in January 2003 from Omaha, Neb., where he ran the company's ABC station KETV. Dyer has overhauled the station's management team, hiring a new news director, director of engineering and creative services director. Brennan Donnellan started last August as WLWT's news director. He had been news director at WSTM, Raycom Media's NBC affiliate in Syracuse, N.Y.

WLWT's local sales manager, Mark Diangelo, was promoted last December to general sales manager when his predecessor, Michael Hayes, left to become gm of the company's NBC affiliate WYFF-TV in Greenville, S.C.

"Our station was, at one time, held in very high regard here in Cincinnati," says Dyer. "Change has been a very big part of the station's reality in the last 10 years," including three different owners. "We're looking to establish a new voice that is relevant." WLWT is also dumping *The Jerry Springer Show* in the fall for *The Jane Pauley Show*. Springer, elected mayor of Cincinnati at age 33 in 1977, got his broadcasting start at WLWT in 1982. WSTR will pick up the *Springer* show.

Last October, Raycom Media's Fox affiliate WXIX-TV launched the market's (continued on page 17)

NIelsen MONITOR-PLUS AD SPENDING BY MEDIA / CINCINNATI

	Jan.-Dec. 2001	Jan.-Dec. 2002
Spot TV	\$173,953,676	\$169,752,198
Local Newspaper	\$168,935,320	\$187,044,200
Spot Radio	\$83,021,070	\$86,196,270
Outdoor	\$9,886,280	\$11,194,070
Total	\$435,796,346	\$454,186,738

Source: Nielsen Monitor-Plus



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(continued from page 16) first 4:30 a.m. news, expanding its morning news to four and a half hours. As one of the country's strongest Fox affiliates in prime time, WXIX last October marked the 10th anniversary of its late news, which often rivals WCPO's 11 p.m. newscasts in delivery of demos.

In the past year and a half, WXIX has experienced significant growth in both ratings and revenue, says vp/gm John Long. In the summer of 2002, Long says, his station began targeting WKRC in the mornings. "We just felt that they were so strong that they had nowhere to go but down," he says. In November, WKRC won in adults 25-54 from 5-6 a.m., although the distance between first and fourth was five-tenths of a rating point. From 6-7 a.m., WKRC won with a 2.9 in the demo, followed by WXIX's 2.5. WXIX last fall overhauled its afternoon lineup, adding *The Ellen DeGeneres Show* at noon and *The Sharon Osbourne Show* at 2 p.m. to "put together an afternoon lineup [targeting] young women who have left and gone over to cable—and it's working," Long says.

UPN affiliate WBQC-CA, which exists as a cable-access channel owned by local broadcaster Elliot Block, has forged a solid partnership with WXIX since it carried WXIX's hour-long 10 p.m. news live for the month during the Major League Baseball playoffs last fall. It marked the first time WXIX had teamed with WBQC in such a way. WBQC station manager Matthew Gray says that based on this new relationship, WXIX has started producing 30-second weather updates during prime time on WBQC, which does not run local news.

WBQC also picked up a Jefferson-Pilot sports package in January to carry eight SEC football games, including those of the University of Kentucky and the University of Tennessee. The games previously aired on WB affiliate WSTR-TV, owned by Sinclair Broadcast Group. And today marks the end of WBQC's agreement with Paxson Communications to serve as the market's secondary Pax TV affiliate. Although it has no local broadcast TV home, Pax programming continues to be available on cable.

WSTR has provided WXIX with its first competition at 10 p.m. with the launch of Sinclair's News Central. The one-hour newscast, launched Sept. 2, 2003, is broadcast from Sinclair's Maryland headquarters, with local news produced from WSTR's own news studio inserted into the national telecast.

Time Warner Cable, the dominant cable provider in the market, has about 342,000 subscribers, representing about 36 percent of

SCARBOROUGH PROFILE

Comparison of Cincinnati

TO THE TOP 50 MARKET AVERAGE

	Top 50 Market Average %	Cincinnati Composition %	Cincinnati Index
DEMOGRAPHICS			
Age 18-34	31	31	100
Age 35-54	40	40	100
Age 55+	29	29	100
HHI \$75,000+	30	27	88
College Graduate	13	12	95
Any Postgraduate Work	11	8	77
Professional/Managerial	23	20	90
African American	13	11	83
Hispanic	14	#	#
MEDIA USAGE-AVERAGE AUDIENCES*			
Read Any Daily Newspaper	54	48	89
Read Any Sunday Newspaper	63	62	99
Total Radio Morning Drive M-F	22	20	91
Total Radio Afternoon Drive M-F	18	18	100
Total TV Early News M-F	29	28	97
Total TV Prime Time M-Sun	39	41	104
Total Cable Prime Time M-Sun	14	14	100
MEDIA USAGE-OTHER			
Accessed Internet Past 30 Days	60	61	101
HOME TECHNOLOGY			
Owens a Personal Computer	68	69	102
Purchase Using Internet Past 12 Months	41	38	93
HH Connected to Cable	67	66	98
HH Connected to Satellite/Microwave Dish	18	17	95
HH Uses Broadband Internet Connection	16	16	100

#Respondent level too low to report. *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
Source: 2003 Scarborough Research Top 50 Market Report (February 2002 - March 2003)

ARBITRON RADIO OWNERSHIP

Owner	Stations	Avg. Qtr.-Hour Share	Revenue (in millions)	Share of Total
Clear Channel Communications	4 AM, 4 FM	35.6	\$67.0	48.8%
Infinity Broadcasting	4 FM	16.3	\$32.0	23.3%
Susquehanna Radio	3 FM	14.3	\$21.4	15.6%
Radio One	1 FM	5.2	\$6.8	5.0%

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

cable homes in the DMA, which does not have a local cable interconnect. Time Warner inserts on 42 networks and covers southwest Ohio and parts of southeast Indiana. Adelphia Communications also serves Hamilton County, where Cincinnati is located. New York-based Insight Communications is the other main multiple-system operator in the area, controlling the Northern Kentucky portion of

the tristate DMA.

Fox Sports Net Ohio carries Major League Baseball's Reds, National Hockey League's Columbus Blue Jackets and National Basketball Association's Cleveland Cavaliers, as well as college basketball games of Cincinnati-based Xavier University and University of Dayton.

The Cincinnati radio market ranks No. 26 in the nation and is considered a tristate mar-

NEWSPAPERS: THE ABCs

	Daily Circulation	Sunday Circulation	Daily Market Penetration	Sunday Market Penetration
Hamilton County: 336,399 Households				
<i>Cincinnati Enquirer</i>	110,795	164,968	32.9%	49.0%
<i>Cincinnati Post</i>	20,064		6.0%	
Butler County: 122,075 Households				
(Hamilton) <i>Journal News</i>	22,415	23,838	17.9%	19.0%
<i>Cincinnati Enquirer</i>	20,649	32,777	16.9%	26.8%
<i>The Middletown Journal</i>	16,076	17,001	12.8%	13.6%
Clermont County: 66,100 Households				
<i>Cincinnati Enquirer</i>	14,888	27,575	22.5%	41.7%
<i>Cincinnati Post</i>	1,596		2.4%	

Data is based on audited numbers published in the Audit Bureau of Circulations' Fall 2003 County Penetration Report

NIELSEN RATINGS / CINCINNATI

EVENING AND LATE-NEWS DAYPARTS, WEEKDAYS

Evening News

Time	Network	Station	Rating	Share
4-4:30 p.m.	CBS	WKRC	4.9	13
5-5:30 p.m.	ABC	WCPO	7.7	19
	CBS	WKRC	6.8	15
	NBC	WLWT	5.3	12
	Fox	WXIX*	2.4	5
	WB	WSTR*	1.5	3
5:30-6 p.m.	ABC	WCPO	9.1	18
	CBS	WKRC	8.7	17
	NBC	WLWT	4.7	9
	Fox	WXIX*	3.3	7
	WB	WSTR*	1.5	3
6-6:30 p.m.	ABC	WCPO	10.0	19
	CBS	WKRC	8.7	17
	NBC	WL	5.6	10
	Fox	WXIX*	4.3	8
	WB	WSTR*	1.5	3

Late News

Time	Network	Station	Rating	Share
10-11 p.m.	Fox	WXIX	7.2	11
11-11:30 p.m.	CBS	WKRC	13.7	25
	NBC	WLWT	8.8	16
	ABC	WCPO	8.8	16
	Fox	WXIX*	4.7	9
	WB	WSTR*	1.7	3

*Non-news programming. Source: Nielsen Media Research, November 2003

ket. With eight stations in the market, Clear Channel is the overwhelmingly dominant radio broadcaster, controlling nearly half of the radio ad billings (see chart on page 17).

Although Clear Channel's powerhouse News/Talk/Sports WLW-AM retained its No. 1 position overall among listeners 12-plus, the station experienced its lowest showing in the fall Arbitron survey in more than a year. The station fell to an 8.9 share in the fall book from a 9.4 in the summer.

WLW, the flagship station of the Reds, is the market's top biller, raking in an estimated \$25.5 million in 2002, according to BIA Financial Network. The Reds opened their new Great American Ball Park last year.

WLW is also the morning-drive leader, a position cemented by weekday-morning host and 36-year Cincinnati veteran broadcaster Jim Scott. The station's afternoon-drive show from 3-7 p.m. tied for first in the fall book with a 6.4 share with sister station WKFS-FM, a Contemporary Hit Radio outlet. WKFS competes with Infinity's Contemporary Hit Radio WKRQ-FM.

With San Antonio-based Clear Channel cracking down on vulgarity by its disc jockeys, the company's Cincinnati stations have cleaned up their act. However, Infinity has said it has no intention of yanking shock-jock Howard Stern off the air in Cincinnati at its Alternative WAQZ-FM.

Infinity's WUBE-FM is the market's top Country station, competing closely with Susquehanna's WYGY-FM. WUBE earned a 5.2 share (among listeners 12-plus) last fall, down from a 6.3; WYGY improved slightly to a 3.8 from a 3.7. Susquehanna's Adult Contemporary WRRM-FM tied for No. 2 overall last fall with CC's Rock WEBN-FM, both of which averaged a 6.0. Radio One's lone station, Urban WIZF-FM, also finished in a tie with WUBE for sixth place in 12-plus. On March 1, the latter station welcomed back popular local personality Bill Whyte, who hosted a top-rated morning show on WUBE from 1982-1992.

Cincinnati remains a two-paper city, due to a joint operating agreement between Gannett Co.'s *Cincinnati Enquirer* and E.W. Scripps' *Cincinnati Post*. While the papers compete editorially, they share business functions, including distribution, circulation and advertising. The JOA is set to expire in 2007.

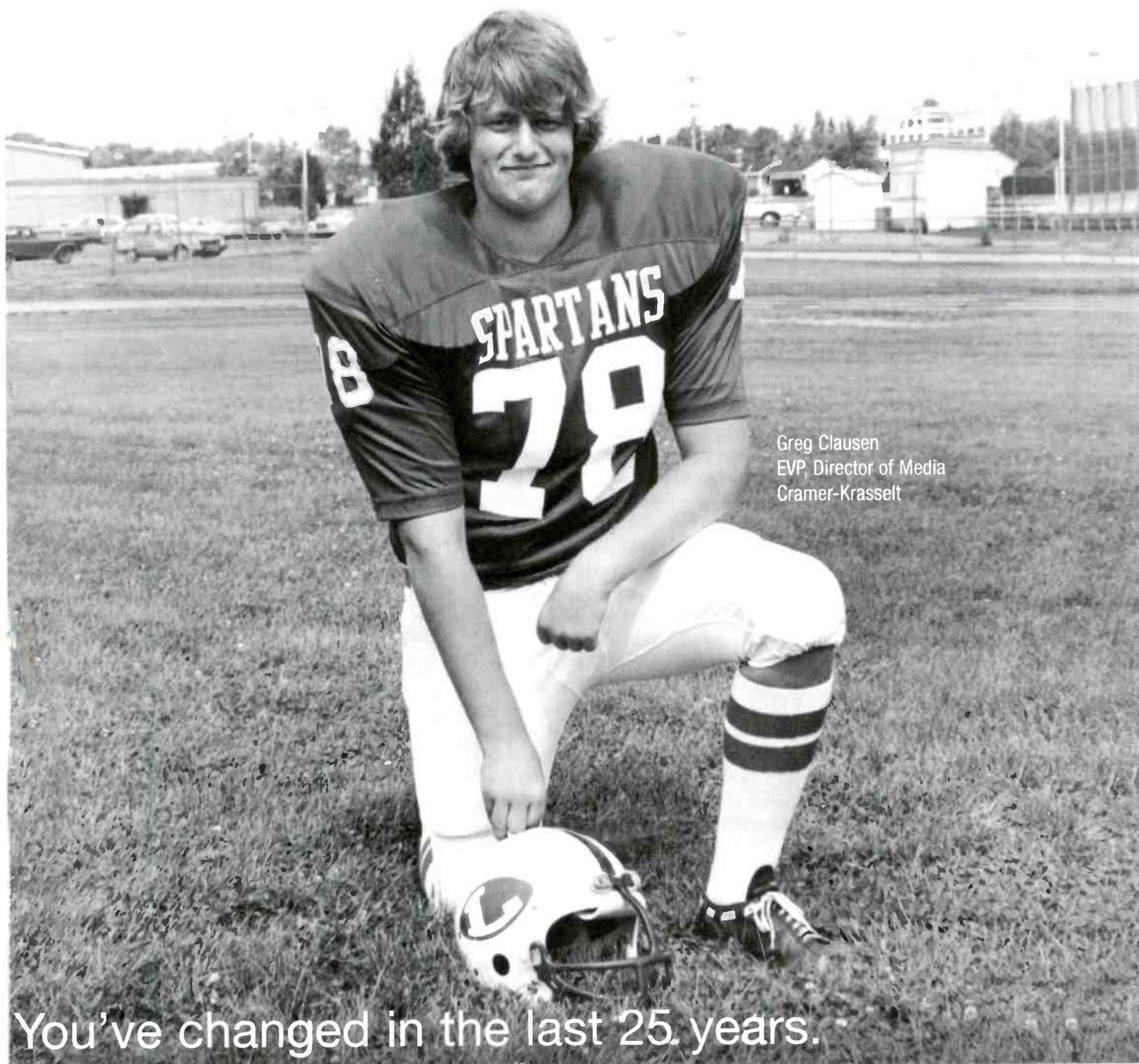
The *Enquirer*, which focuses on the greater Cincinnati and northern Kentucky region, is the largest daily paper in the city. Its Monday-Thursday circulation last September was 182,176, down 3.7 percent from September 2002, according to the Audit Bureau of Circulations. Its Friday circ fell nearly 1 percent to 213,252, while Sunday circ also posted a fractional decline to 306,093.

The afternoon *Post* experienced sharper declines in the past year. Its weekday circ slid 8.3 percent last September to 42,219, while its Saturday circ dropped 9.5 percent to 57,543.

Last month, the *Enquirer* relaunched its 10-year-old Weekend entertainment product. The expanded Friday section includes coverage of dining, the arts, family activities, movies and nightlife as well as a calendar of events throughout the Cincinnati area and northern Kentucky.

Last October, the *Enquirer* introduced *CiN Weekly*, an entertainment-focused weekly magazine designed to appeal to 25-to-34-year-olds in its core circulation area. The title features content on local events, food, relationships, fitness, music and family activities.

In out-of-home advertising, locally based Norton Advertising and Baton Rouge, La.-based Lamar Advertising are the two biggest players. Norton, which has been locally owned and operated since 1949, offers a product assortment that includes permanent and rotary bulletins, 30-sheet posters, 8-sheet junior posters, TriVisions and wallscapes. Lamar offers a total of about 1,200 outdoor structures in the region, including a digital smart board (a high-tech billboard) located off Interstate 71. ■



Greg Clausen
EVP, Director of Media
Cramer-Krasselt

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OPINION
REBECCA MCPHETERS

Flaws in the Two-Metric System

Magazines shouldn't have to be judged by both circ *and* audience

ONE OF THE CHALLENGES confronting magazine publishers is advertisers' use of two disparate sets of metrics—measured audience and audited circulation—to evaluate the suitability of magazine titles for inclusion in their schedules. While audience is the dominant evaluative tool, circulation also comes into play. A perceived lack of circ “quality” can get a publication kicked off of a schedule—or can be used to negotiate a lower price. Buyers and sellers alike devote substantial time and resources to verifying, analyzing, attacking and defending circulation.

The two-metric system reminds me of the story of the Easter ham. For years, a young girl watched her mother cut the ham in half before she put it in the oven. When she grew up and had her own home, like her mother, she also cut the ham in two pieces before she baked it. Well, actually, she delegated the task to her husband, who did it with a saw. He was not enthusiastic. “You know, this is a lot of trouble,” he complained. “Couldn't we just have a filet, or a lamb roast—you know, something that you can do by yourself? I mean, why do we have to cut it in half anyway?” “I'm not quite sure,” his wife replied, “but I know it's the way it's always done—it's the Easter ham. Maybe it has religious significance.” When her mother showed up for the holiday meal, she asked her daughter to explain the two-piece ham's significance. “Oh, sweetheart,” exclaimed the mother, “I only cut it in two because my oven was so small, it wouldn't fit in any other way!”

The industry's continued focus on circulation is analogous to halving the ham. Audited circulation gained credence as a metric—and for good reason—simply because there were no other metrics with which to compare publications. Until the 1960s, when audience measurement of print publications was introduced, circulation was the only game in town. As such, it had considerable utility as an evaluative tool—providing advertisers with assurance that what they bought was indeed being delivered. Now, with the presence of consistent and audited audience measurement by reputable firms like MRI and Scarborough, the use of circulation as a metric is as unnecessary as bisecting the Easter ham.

The value of a publication for advertisers lies in the size and the quality of the audience it provides. How many qualified prospects see an ad? As an industry, we should be moving way beyond audience to look more carefully at ad effectiveness. We should be seeking answers to a different question: How many readers will buy the product? Instead, we're stuck in the anachronistic practice of actually counting copies. It's not how many copies are purchased, but how well they are read and how likely their readers are to respond to advertising messages.

Old habits die hard, but why has this one hung on for so long? Publishers and advertisers share the blame. Most publishing companies are still organized into three silos: editorial, advertising and circulation. Each group is responsible for managing its own revenues and/or costs. Consequently, most circulators are still focused on “circulation contribution,” or the net contribution of circ to the bottom line as measured by circ revenue minus circ costs. But since the success—or failure—of circulation strategies ultimately affects advertising revenue, they should be focused not on circulation contribution but on the publication's bottom line. The distinction is an important one. If the goal is overall profitability, the competent circulator will make very different decisions than if the goal is to maximize circ contribution.

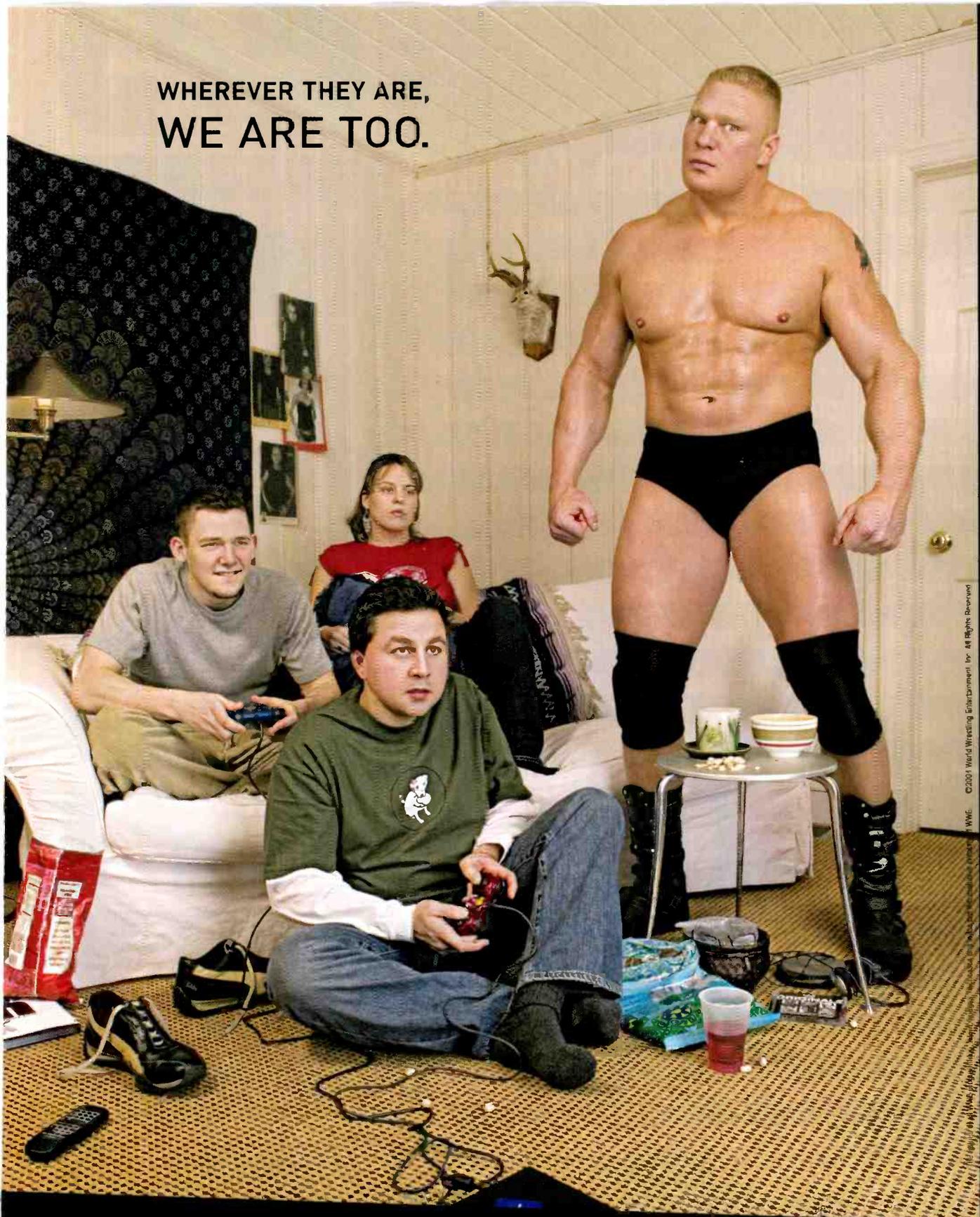
How does this work? In combination with editorial, circulation strategies and tactics are the principal determinants of measured audience. Measured audience is the primary economic lever in magazine publishing, because it determines how appealing a magazine is to advertisers and how likely it is to make an advertisers' schedule. It also affects how much publishers can charge for those pages. In combination, these two factors—pages and page rates—determine the level of ad revenue that a publication will enjoy. While audience measurement is not perfect and is subject to statistical variance, it is, in general, an accurate reflection of advertiser value.

Publishers have historically resisted understanding the importance of measured audience, viewing it as an unduly complicated process with myriad vagaries, and one over which they could exercise no control. In many organizations, circulators are never even shown audience numbers, much less held accountable for them. Audience numbers are naively viewed only as an ad sales tool and rarely pass through the walls of the advertising silo into the circulation or editorial areas, where they can also be of use.

Advertisers are understandably reluctant to abandon the current system because a circulation focus has helped them negotiate lower prices. However, it has also ensured that they actually receive less value, since publishers have been required to devote too much attention to delivering upon their rate-base guarantees and managing to what they have to report on their ABC statements, and not enough in managing audience delivery. Both advertisers and publishers would be better served if this attention were diverted to building better audiences! ■

Rebecca McPheters founded and heads McPheters & Co., a media consultancy specializing in issues related to management and profitability. She can be contacted at rmpeters@mcpeters.com.

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WE ARE TOO.



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TV SERIES



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And we're also Pay-Per-View. We're Video On Demand. We're books and magazines. We're licensing and merchandising. We're the #1 regularly scheduled cable program. And we're a whole lot more. All of this gives us an arsenal of marketing, promotional, and programming tools to reach our audience, the elusive 12-34 year-olds, and quench their insatiable thirst for all things WWE. That's good news for you, because wherever we are, we'll make sure you're right there too, in ways that you never dreamed possible.

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Midway through the 2003-04 season and just in time for the second annual Syndicated Network TV Association conference in New York this week, Marc Berman's ratings analysis for all strip programming, first-run and off-net, aims to help media buyers figure out where to park their ad dollars in the coming season. Broken out by genre and highlighted by each target demographic, we'll tell you what's hot and what's not in first-run talk, game/relationship, court, magazine/reality and off-network sitcoms.

All data is from Nielsen Media Research and covers ratings from the applicable premiere date for each series in September 2003 through Feb. 15, 2004, compared to the same period the previous season.

>>> 2004

This section's second story, on page 36, from contributing writer Eric Schmuckler, lets the syndicators' sales execs explain why they believe they'll enjoy another banner year in the upfront marketplace in 2004. And as every good marketplace story should, the piece includes some rebuttal from the major national TV media buyers.

Happy negotiating, everyone.

SYNDICATED NETWORK TV ASSOCIATION CONFERENCE REPORT

Talk Shows

TARGET DEMO: WOMEN 25-54

SHOW (SYNDICATOR)	SEASON-TO-DATE RATING	PERCENT CHANGE OVER 2002 SEASON
OPRAH (KING WORLD)	5.4	+23%
DR. PHIL (KING WORLD)	3.7	+16%
LIVE! WITH REGIS & KELLY (BUENA VISTA)	2.4	+14%
MAURY (UNIVERSAL)	2.0	-5%
MONTEL (PARAMOUNT)	1.8	+6%
JERRY SPRINGER (UNIVERSAL)	1.5	-6%
ELLEN DEGENERES (WARNER BROS.)	1.2	NA
SHARON OSBOURNE (WARNER BROS.)*	1.0	NA
RICKI (SONY)*	0.9	-18%
JOHN WALSH (NBC)*	0.8	NO CHANGE
ON AIR WITH RYAN SEACREST (TWENTIETH)	0.7	NA
MARTHA STEWART (KING WORLD)	0.7	NO CHANGE
CROSSING OVER WITH JOHN EDWARD (UNIVERSAL)*	0.7	-42%
GOOD DAY LIVE (TWENTIETH)	0.6	+50%
LIVING IT UP! WITH ALI & JACK (KING WORLD)	0.6	NA
WAYNE BRADY (BUENA VISTA)*	0.6	NA

* CANCELLED

The best way to describe the category of syndicated talk is: The rich just keep getting richer. Not only does King World's *Oprah* lead all its competitors, the 18-year-old juggernaut is up 19 percent in households (from a 5.8 rating to a 6.9), with growth of a considerable 23 percent in the key women 25-54 demographic. Spin-off *Dr. Phil*, which roared out of the gate last season as the highest rated new first-run talk show since *Oprah's* debut in 1986, is also experiencing double-digit growth in households (4.6 to 5.3, a 15 percent gain), women 25-54 and all female demos.

Despite those successes, not every talk show King World produces turns to gold. The ill-fitted *Living it Up! With Ali & Jack*, which pulls a last-place 0.6 in women 25-54 (and a 0.5 among women 18-49) is a good example. Comparatively, that's tied with Twentieth Television's *Good Day Live* and Buena Vista's already-cancelled *Wayne Brady Show*. Although a 0.6 for *Good Day Live* is a significant year-to-year improvement thanks to a more extensive clearance list, downgrades for the syndicator's struggling *On Air With Ryan Seacrest* in New York (WWOR at 5 p.m. to WNYW at 3) and Chicago (WPWR at 6 p.m. to WFLD at 3) does not bode well for the latter's future. In target women 18-34, *Seacrest* ranks tenth in the genre, with a mere 0.9 rating.

"While I understand why *Seacrest* was given a talk show, the success of *American Idol* [on Fox] was no guarantee he would find an audience in daytime," notes Brad Adgate, senior vp/director of corporate research at Horizon Media. "And had *Living it Up! With Ali & Jack* not been pre-sold for two years, that show might have been history by now."

"Ellen is here to stay. She's comfortable, unique and the show is well-produced."

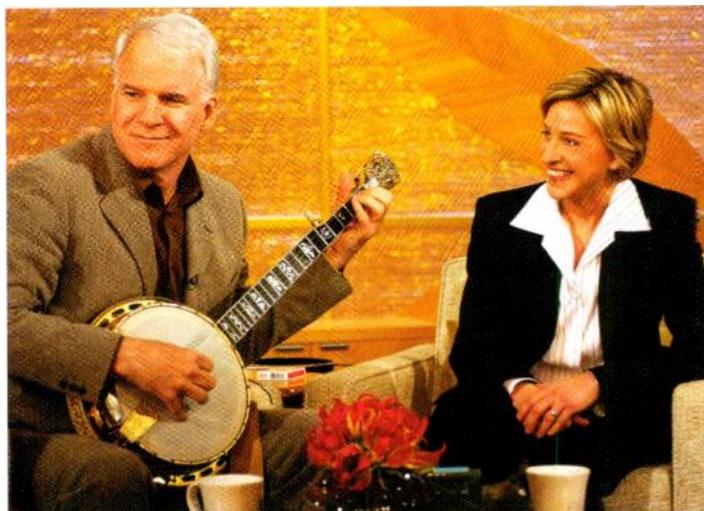
CARROLL

Perhaps there's an even more worrying trend in *Seacrest's* mediocre results so far. "For all the money that was spent launching *Ryan Seacrest*, the minimal initial sampling really baffles me," explains Laura Caraccioli-Davis, senior vp/director of SMG Entertainment. "With *Ricki's* audience aging up, my concern is there is no longer an audience for persons 12-34 in syndication."

Of the five freshman talkers, *Ellen DeGeneres* has shown the most improvement, thanks to recent rave reviews, upgraded clearances and strong word of mouth. The Warner Bros. strip has averaged a consecutive 1.6 rating in women 25-54 for the most recent three weeks, up 33 percent from its already-growing season-to-date average. In households, an average 2.2 for *Ellen* in those same weeks was almost a full rating point ahead of its 1.4 debut for the week of Sept. 8, 2003. "*Ellen DeGeneres* is here to stay," believes Bill Carroll, vp/director for programming at the Katz Television Group. "She's comfortable, unique and the show is well-produced. The arrival of *Ellen* is a real positive for our business."

Elsewhere, Buena Vista's *Live! With Regis & Kelly* continues to thrive, increasing by 9 percent in households (3.5 to 3.8) and 14 percent among women 25-54. Paramount's *Montel* is also on the plus side, while Universal Television's *Maury* and *Jerry Springer* are close to year-ago levels. While the future of King World's reality/talker *Martha Stewart* is marred by the host's current legal woes, the show is on par with 2002-03 levels. Less successful is Sony Pictures Television's *Ricki*, which will not be returning next season, despite the syndicator's refusal to admit it.

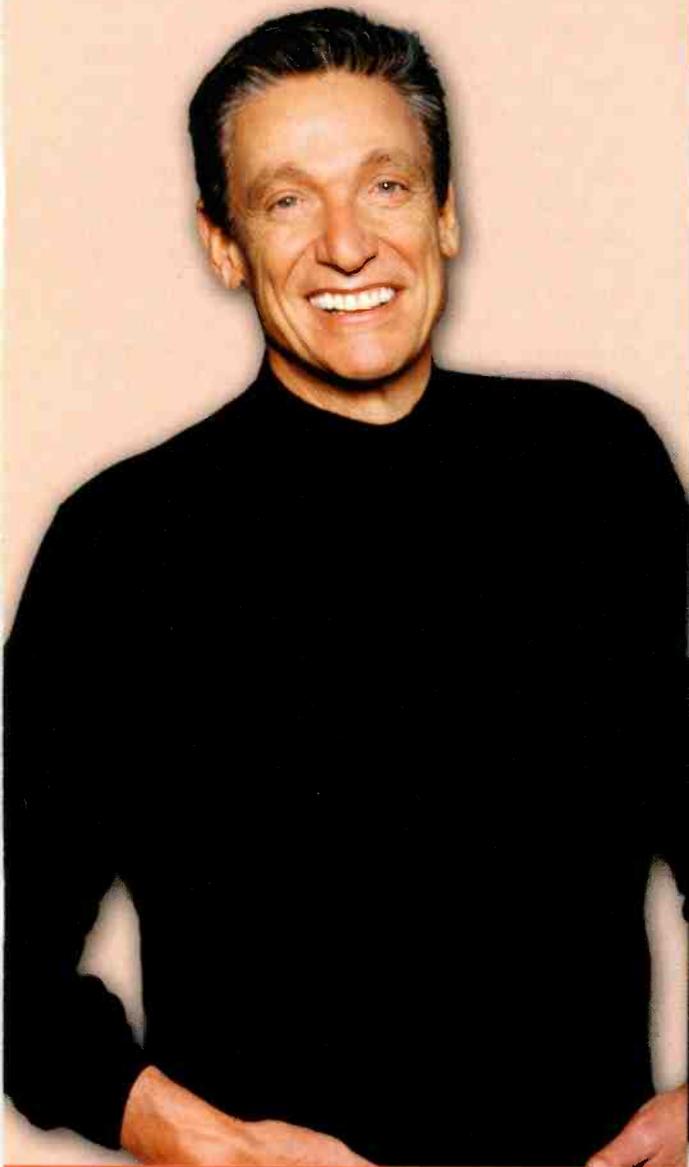
Several new entrants will try their hand at the genre: *The Jane Pauley Show* (from NBC Enterprises), *Life & Style* (Sony Pictures TV), *Moving In With Pat Croce* (also Sony) and *The Tony Danza Show* (Buena Vista).



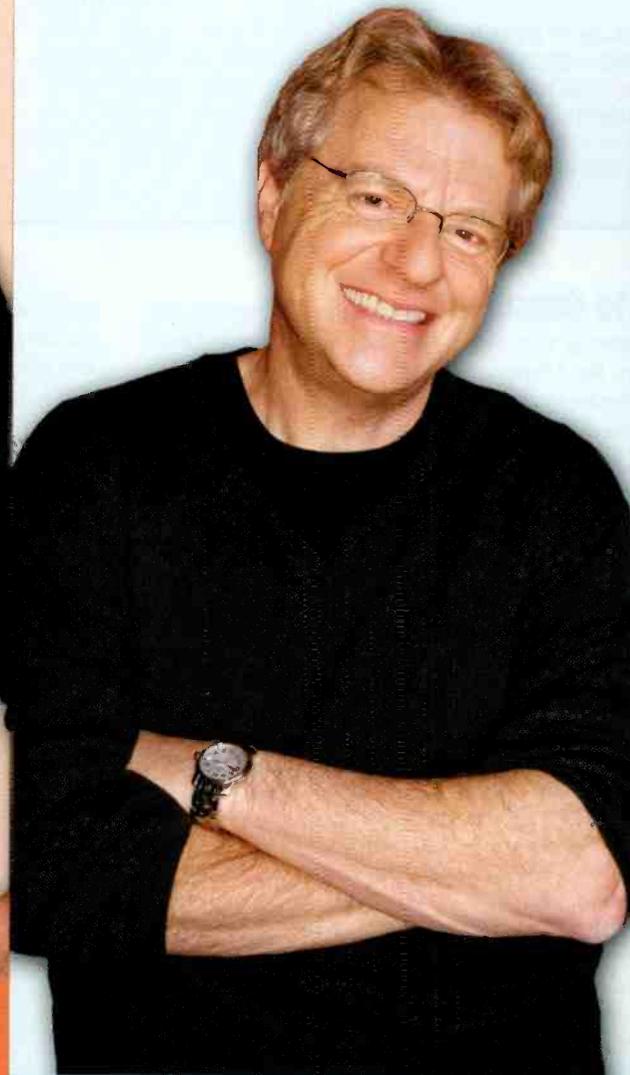
MUSIC TO HER EARS A slow gainer, *Ellen DeGeneres* is widely considered to be one of the longer-lasting new talk shows in production.

UNIVERSA

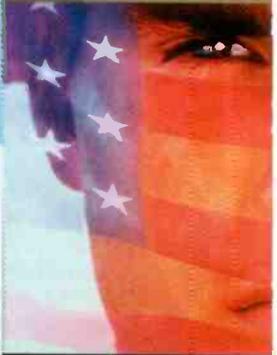
MAURY



JERRY SPRINGER



MOVIE



FIELD OF DREAMS



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• Record-breaking delivery among W18-34, W18-49. ⁽¹⁾

• A top 5 talk strip for 7 consecutive seasons. ⁽²⁾

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Source: NSS/Galaxy Explorer. AA/GAA%.
(1) November sweeps 1998-2003.
(2) HH AA/GAA%. Premiere-to-date by season, 03-04 season thru 2/8/04. Talk = type codes CC.
(3) Premiere-to-date thru 2/8/04. Relationship strips = Blind Date, Fifth Wheel, Eliminate, Extreme Dating.
(4) HH AA/GAA%. Week ending 2/8/04 vs. 10/5/03.

L A P P E A L

PACKAGE

THE 5TH WHEEL

BLIND DATE



**BORN ON THE
FOURTH
OF JULY**



• #1 relationship strip in HH,
P18-34, P18-49. ⁽³⁾

• Up 67% since season
premiere. ⁽⁴⁾



Magazine/Reality

TARGET DEMO: WOMEN 25-54

SHOW (SYNDICATOR)	SEASON-TO-DATE RATING	PERCENT CHANGE OVER 2002 SEASON
ENTERTAINMENT TONIGHT (PARAMOUNT)	3.9	NO CHANGE
ACCESS HOLLYWOOD (NBC)	2.3	+21%
INSIDE EDITION (KING WORLD)	2.2	+ 5%
EXTRA (WARNER BROS.)	1.8	-10%
CELEBRITY JUSTICE (WARNER BROS.)	0.9	+13%
STARTING OVER (NBC)	0.7	NA

Like other categories in syndication—and unlike the networks, where shows come and go all the time—the magazine genre has proven itself a breeding ground for durability, with Warner Bros.' *Extra*, at 8 years old, the youngest of the four established strips. Although *Extra* has lost some steam (while Paramount's *Entertainment Tonight* remains at the top of the heap with another season of strong numbers), King World's *Inside Edition* recently delivered a rock-solid 4.5 in households for the week of Feb. 2, its best in six

"As long as there are celebrities, there will be shows of this nature. It's always an interesting genre to come home to." CARROLL



WINNING VIEWERS *Inside Edition*, hosted by Deborah Norville, has seen its ratings rise, as have most of the other celebrity magazines.

years. The veteran newsmagazine is up 9 percent in households (3.4 to 3.7), between 5 and 7 percent in female demos, and 8 percent among men 25-54 (1.2 to 1.3). NBC Enterprises' *Access Hollywood* has also performed solidly, up 15 percent in households (2.7 to 3.1) and between 12 and 21 percent in a variety of women's demos. "As long as there are celebrities, there will be shows of this nature," says Katz TV's Carroll. "It's always an entertaining genre to come home to."

"Celebrity-driven newsmagazines are like fast food," adds Horizon's Adgate. "They're hard to resist."

But not every show has a bright future under the klieg lights of Hollywood. Although *Celebrity Justice* from Warner Bros. is on the plus side among women 25-54 but flat in households (1.3) and other demos, the future of the 2-year-old strip is a bit uncertain, despite assurances from the syndicator that the series is likely to go forward. The same uncertainty hangs over NBC Enterprises' *Starting Over*, despite a renewal on NBC's 14 owned-and-operated stations for 2004-05. Season-to-date, *Starting Over*, which some insiders say belongs in the talk genre, is averaging only a 1.0 in households. Its highest demo rating, women 18-34, is a paltry 0.9. "Keep in mind that NBC also renewed *The Other Half* and *The John Walsh Show* for a second season before canceling them midway through season two," says Adgate. "With an inside stake in the show, syndicators are not as quick to cancel low-rated freshman series."

"While I admire NBC for their efforts launching something different like *Starting Over*, the results after six months are questionable," says Starcom's Caraccioli-Davis. "Personally, I would like to see this succeed because it really does introduce something new."

Looking ahead, if there is one new show that has the potential to break out next season, it is *Entertainment Tonight* spinoff *The Insider*, which will benefit from its built-in familiarity and airing back-to-back with its parent show in many markets.

"If they do it right—and knowing Paramount, they will—*The Insider* should be poised for a successful run," says Carroll.

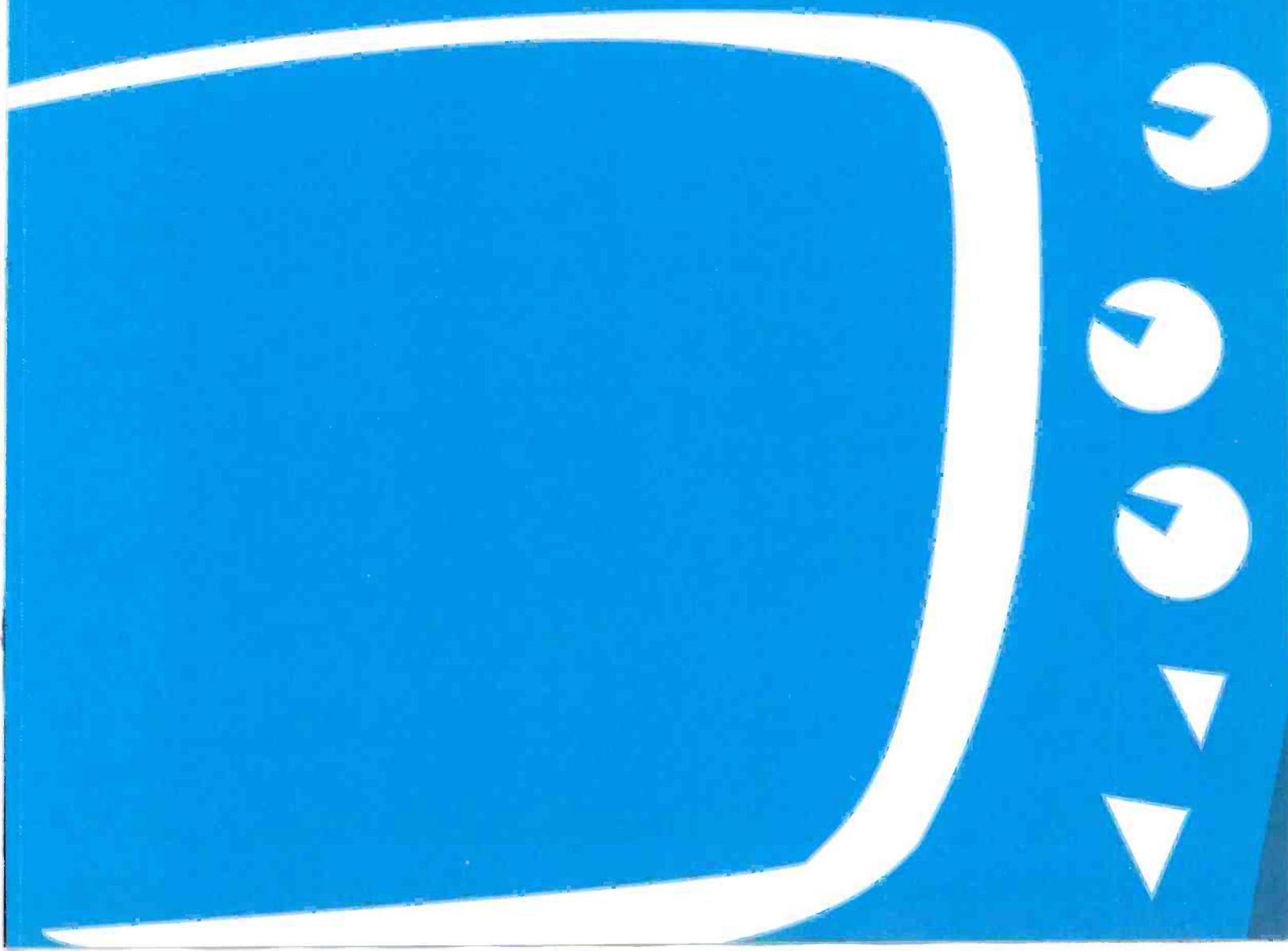
(continued on page 27)

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Family Friendly Programming Forum



Five years have passed since the founding of the Family Friendly Programming Forum, yet advertisers' concerns about the content of the television programming that enters the living rooms of America's families are more relevant than ever. We have made tremendous progress but still have a ways to go. Recent examples abound of prime-time television content that pushes the limits of acceptable family programming.

The Family Friendly Programming Forum—a group of over 40 major national advertisers, all members of the Association of National Advertisers—continues in its quest to take positive steps to increase family-friendly programming choices on television. We market some of the most respected brands in America, and the quality of the prime-time programming we depend on to reach our customers is very important to us. We do not want to dictate what television should be; instead, we ask, "What is the best that television can be?"

The Family Friendly Programming Forum recently received the Diversity Achievement Award for Education from District 2 of the American Advertising Federation. As a result of the Forum's emphasis on the need for more family-friendly programming, we have energized the networks to develop more family-friendly options and, just as important, programming with positive portrayals of minorities. We are thrilled that in 2003 the direct efforts from our script development fund brought the shows "Like Family" (WB), "All About the Andersons" (WB), "Steve Harvey" (WB) and "Tracy Morgan" (NBC) to network television, joining "8 Simple Rules" (ABC), "The Gilmore Girls" (WB) and "American Dreams" (NBC). We expect to expand on this fine work with the help of our network partners and Family Friendly Programming Forum members.

We also award scholarships to university students who are studying television script writing. To date, we have helped 27 future writers understand that not only advertisers but also the public support this type of programming. This past summer, the National Council for Families in Television held a symposium highlighting that family-friendly programming is not altruism but rather good business for all involved—the networks, the writers, the advertisers and, last but not least, consumers of our products and services.

The Forum is proof that many major advertisers are devoting time, energy and financial resources to back their commitment to family-friendly programming. With your help and support, we will continue to encourage the entertainment community to provide more family-friendly programming options.



Kaki Hinton
Kaki Hinton,
Vice President,
Advertising Services,
Pfizer Inc.
(Pfizer Consumer Group)
FFPF Co-Chair



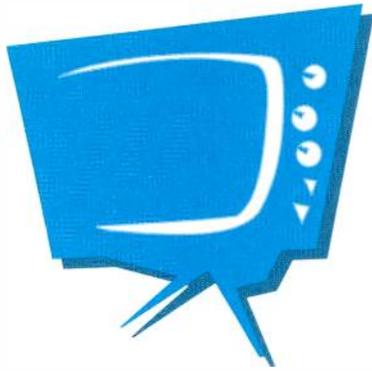
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Johnson & Johnson
Kellogg Co.
KFC Corporation
Kraft Foods Inc.
Liberty Mutual Group
Lowe's Companies Inc.
Masterfoods USA
McCormick & Co. Inc.
McDonald's Corporation
Merck & Co. Inc.
Nestlé USA
Novartis Consumer Health Inc.
Pepsi-Cola Co.
Pfizer Inc
Procter & Gamble Co.
Schering-Plough HealthCare Products Inc.
Sears, Roebuck & Co.
Sprint Corporation
State Farm Insurance Co.
The J. M. Smucker Co.
Tyson Foods Inc.
Unilever United States Inc.
Verizon Communications
Wachovia Corporation
Wal-Mart Stores Inc.
Welch Foods Inc.
WellPoint Health Networks Inc.
Wendy's International Inc.



Family Definitely Matters

There is plenty of reason to feel good about the work of the Family Friendly Programming Forum, with its goal of bringing the family together around the television set. Since setting out five years ago to encourage broadcast networks to air more prime-time programs the entire family can watch, the group has seen the launch of successes such as *Gilmore Girls*, *8 Simple Rules for Dating My Teenage Daughter* and *American Dreams*, not to mention four new comedies on air this season.

But the Forum does not support the creation of family friendly shows simply because its members are good corporate citizens. The 44 major advertisers who comprise the group include many of the savviest, most respected marketers in the business world—Pfizer, Procter & Gamble, Johnson & Johnson, Unilever and Verizon to name a few. They are encouraging the growth of family friendly programs because it is good business for them and furthers their marketing goals. They are succeeding because it is also good business for the networks that air these programs and for the Hollywood producers who

create them. If ratings are any indication, they are also striking a chord with viewers.

Kaki Hinton, vice president of advertising services for Pfizer Consumer Health Care, notes that the Forum is being recognized not only by consumers but by its peers in the advertising business—the group recently received the Diversity Achievement Award for Education from District 2 of the American Advertising Federation. “The added emphasis on the need for family friendly programming has energized the networks to develop more family friendly options and also more positive portrayals of minorities,” she says.

The goals of the forum are neatly aligned with the marketing goals of a company like Pfizer. “We’re a company that’s all about wellness and well-being,” says Hinton. “Many of our products are family oriented, from Pedicare to Listerine to Sudafed, and the family friendly environment only emphasizes brand loyalty to our products. Our consumers thank us for the programs we sponsor.”

“It’s more common sense than anything,” says Pat Gentile, national television programming manager, P&G Productions. “This



Attendees at District 2 AAF's 2004 Diversity Achievement Award Dinner at which the FFPF was honored. From left: Pat Gentile (Procter & Gamble), Barbara Bacci Mirque (ANA), Kaki Hinton (Pfizer Inc), Pam Gibbons (Carat), Scott Grenz (Pfizer Inc)

is an important way to reach our consumers in a fragmented viewing universe. Family friendly programs don't have to be poor-quality, and they bring a loyal and diverse demographic to the TV set. It's truly a win-win for advertisers and broadcasters.”

According to Bill Morningstar, executive vp of media sales at the WB, “If you can provide marketers with programming that reaches a family audience, then they are going to embrace it. It's really important for marketers to reach families—kids are developing brand loyalties and their parents are heavy consumers of everyday products. This is about providing them a platform to reach an important consumer base. The family friendly advertisers have been great partners and very supportive.”

The advertisers who comprise the Forum represent, by one estimate, half of all the advertising spending in this country. In seeking family friendly programming, they are simply following the money. The 35 million family households in America, including single-parent homes, have a median income of \$51,800 versus

a median of \$42,100 for all households. And these folks are in their prime consuming years.

Television remains the medium of choice for family friendly advertisers. While newspapers, magazines, radio and new media and technologies tend to be targeted and personalized, only television can be a family-connected medium. And there is great potential to increase family co-viewing, notes Perianne Grignon, director of media services for Sears, Roebuck & Co. “Since only 24 percent of moms viewing network prime time are doing so with a child present, adding programming that appeals to both parent and child would surely raise that figure.”

Despite the current keen interest of advertisers in family friendly programming, by the mid-1990s it had gone somewhat out of style. Says Susan Lyne, president of entertainment for ABC, “For a period of time, the networks abandoned family shows and particularly family comedies, because everyone was chasing the Friends audience. The perception was that broadcast fare had to be edgier and deal with that twentysomething single life.”



Kaki Hinton, Co-chair FFPF, accepts District 2 AAF's 2004 Diversity Achievement Award for Education. From left, Hinton; Helen Lavelle, Founder, Chief Creative Officer, Lavelle Murray Advertising, AAF Event Chair; Bob Wehling, former co-chair FFPF and retired CMO, Procter & Gamble

 HALLMARK CHANNEL A TOP 10 NETWORK

CLASS RULES

Some people think that a Top 10 network should
attract an upscale audience \$75K+.
They're right.



Get the full story, contact Bill Abbott,
EVP Advertising Sales (212) 445-6663
hallmarkchanneladsales.com

Where *success stories* come to life

Source: Nielsen Media Research. Top 10 Ranking based on Cov AA% for Jan 04 (12/29/03-1/25/04). Rankings are defined Total Day for all Ad supported cable networks and Hallmark's Sales Total Day (MF 8a-3a, Sat 6a-3a & Sun 1p-3a) which excludes non-commercial programming. Subject to qualifications made available on request. ©2004 Crown Media United States, LLC All Rights Reserved.

Hallmark Channel

Rockets Into Top 10



"Building Hallmark Channel into a Top 10 network is not enough. We have the drive, support and commitment to continue building until we are contending for #1."

DAVE KENIN
Executive Vice President, Programming

"Two years ago we predicted that Hallmark Channel could be a Top 10 rated cable network. We were being pretty aggressive. But we knew we had a chance to put the right programs in the right places and create a competitive programming schedule."

More than any other company in America, Hallmark has had a long and deep tradition of associating the Brand with quality original programming. From the moment the first note of "Amahl and the Night Visitors" rang out on Christmas Eve in 1951, Hallmark Hall of Fame set the gold standard for television dramas.

"Reaching Top 10 status is not enough," stated Mr. Kenin. "The channel must honor the Hallmark tradition of excellence. We have to strive to be the best. Our goal is to be a leader."

A VISION FOR ORIGINAL PROGRAMMING

"In the next two years, we are going to introduce nearly double the already aggressive slate of original movies, original miniseries and series that fulfill the strong relationship that we already have with viewers. We are committed to continuing to fulfill the brand promise, create trust, and continue the deep involvement both our viewers and our advertisers have with the Brand. And, we have the advantage of a special partnership with Hallmark Entertainment, the world's largest producer of high-profile, high-rated television movies and miniseries."

"Not only will Hallmark Channel continue its growth in ratings, but it will emerge as a leader in providing unparalleled value to our viewers and our advertisers through production of original programs."

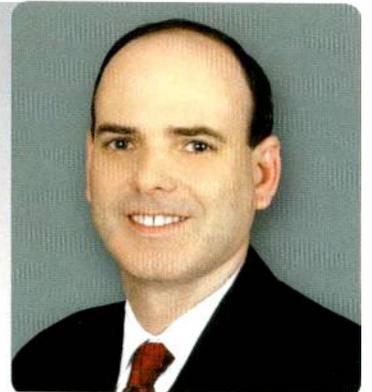
"We know who we are as a network, and that is critical to our success in the cable world," commented Mr. Abbott. Hallmark Channel is going to keep on doing exactly what we have been doing, providing high quality programming, original movies, series and acquisitions, within an unparalleled commercial environment. This is the strategy that has taken us to Cable's Top 10 in just two years, and this is the strategy that will continue to drive our ratings leadership."

ORIGINAL MOVIES PROPEL CHANNEL INTO TOP 10

Hallmark Channel's original movie offerings are a major factor in the high ratings that make it the fastest-growing cable network for the third consecutive year. Of the top-rated 40 original movies on cable in 2003, six were from Hallmark Channel. And two of the network's original premieres, 'Love Comes Softly' and 'A Time to Remember,' ranked #1 and #2 in attracting the largest adult audience 25-54 with household incomes over \$75,000.

"Hallmark Channel is one of the few places in the cable landscape that both viewers and advertisers trust as a safe place for content."

BILL ABBOTT
Executive Vice President, National Advertising Sales



A LITTLE KNOWN FACT: VIEWERS ARE 50% MALE-50% FEMALE

"Hallmark Channel delivers an Adult audience that is almost equally male/female in many key day parts. In fact, programming like our western and mystery blocks attract a diverse audience. With the addition of JAG to our schedule in 2005, our ability to deliver Adults will become even stronger.

We've been remarkably successful at increasing our ratings and distribution. Our advertisers have and will continue to benefit from the many assets and opportunities this company offers. We are very excited about the future."

"Hallmark Channel has always offered advertisers the most effective environment in cable," Ms. Moseley stated. "Our engaged viewers spend more time with us than the viewers of any other network, stay with us through commercials, and a majority of them say they think more highly of a product because it advertises on this network. That's the powerful halo effect of Hallmark."

CELEBRATE THE HOLIDAYS WITH HALLMARK CHANNEL

The Hallmark Brand is synonymous with holidays, and Hallmark Channel is already a leader in holiday programming. In November and December, the network offered viewers holiday movies that attracted 12 million new viewers and led to all-time ratings highs for the day, the week and the month. Ms. Moseley continued, "No wonder 65% of our viewers say we have the best holiday programs on television."



"Hallmark Channel continues to raise the bar on value creation for our advertising partners."

CHRIS MOSELEY
*Executive Vice President,
Worldwide Marketing & Brand
Strategy*

In addition, we again offered our advertisers integrated marketing partnerships with the 4,300 Hallmark Gold Crown® Stores and cross-platform sponsorships that included on-air, in-store, in Gold Crown quarterly mailings, and online. Our Hollywood Holiday Sweepstakes delivered 17 million entries."

HALLMARK CHANNEL ORIGINAL MOVIES: WHERE GREAT STORIES COME TO LIFE

The channel's world premiere original movies are a win-win for viewers and advertisers alike. Viewers enjoy high-quality programming that the whole family can watch together. And advertisers benefit from associating with high-profile events and attracting that elusive upscale audience so desirable for so many brands.

"We are committed to a position of leadership in the cable industry."

DAVID EVANS
President and CEO



"Hallmark Channel is delighted to be a sponsor of the Family Friendly Programming Forum for the third year in a row," remarked Mr. Evans. "As you know, Hallmark is a founding member of the Forum. Another partner of ours, Hallmark Entertainment, is the leading producer of the kind of family friendly programming this group stands for. We are proud that Hallmark Entertainment creates more original movies for Hallmark Channel than for any other cable network."

Last year, in this same space, we stated that the network was headed for a place among the top ten. Today, we are there. Our management team is second to none in this business, and we are strategically positioned to continue growth that will benefit our viewers, our advertisers, our affiliate partners and our shareholders."

MULTI-MILLION DOLLAR INVESTMENT IN PROGRAMMING

The company continues to invest heavily in programming, including original movies. Hallmark Channel will produce up to 36 hours of original movies in 2004, and even more in 2005. The formation of Hallmark Channel's Sponsorship Solutions Unit places a strong focus on these high-rated originals.

"We are offering exclusive movie entitlement sponsorships to our advertising partners. This provides the sponsor with a highly visible ownership position, in an uncluttered environment with reduced commercial load. The advertiser appreciates this, and so does the viewer."

"We won't be satisfied until Hallmark Channel and its family friendly programming are in every cable home in America."



Where *success stories* come to life



Andrea Alstrup, corporate vp of advertising for Johnson & Johnson, was the first to broach the idea of what became the Family Friendly Programming Forum in a 1998 speech. Alstrup spoke out about the strong desire of advertisers for family friendly programming and announced her company's commitment to make it happen.

"Andrea put this into the marketplace as a challenge," remembers Bill McCarron, vp, media and sponsorships, Verizon. "Five years ago, everyone said family friendly was dead. There were only two shows that were okay for family viewing: *Touched by an Angel* and *Seventh Heaven*. Now family friendly is a mantra. It was mentioned in every single network upfront presentation."

While there was a touch of altruism in this challenge, "ultimately it comes down to a business decision," says Dawn Jacobs, vp of advertising, Johnson & Johnson. "It's all about creating choices. We don't say 'This is bad' or 'This is good'; we just like to have choices. The more, the better."

Certainly, advertisers have more family friendly options than they did five years ago—perhaps more than any time since the demise of prime time's mandatory "Family Hour." According to one analysis of the recent fall schedule, there was a family friendly alternative in 11 of the 15 key viewing hours (up to 10 p.m. eastern time). Seven of those programs came under the Forum's auspices; the networks generated the majority. Forum-backed programs have attracted several hundred million dollars of advertising, proving that family friendly can be lucrative

for the broadcast networks too.

"Did we move the needle?" asks McCarron. "Oh, my, yes. We're not looking for

every single show to be family friendly. Just give us one alternative every hour. We can't go dark and say, 'Thursday's out, we can't advertise there.' We just can't do that."

Perhaps the most compelling reasons advertisers seek family friendly programming is that the environment it provides is conducive to selling their products. "The more consistent the environment is with our brand values, the better it is for us," says Jacobs. "Look at *Gilmore Girls*. It's all about a mother and a daughter and life lessons; the characters are good and right about how they learn those lessons. If you can associate your brand with those messages, that's a big plus."

Listen to Andy Jung, senior director of advertising and media for Kellogg. "We're a company close to 100 years old, with brands consumed by children, adults—the gamut," he says. "And we prefer to advertise our brands in environments where there's good solid family friendly programming. We have greater success advertising in this kind of programming. It's a better place for our ads, and we think it's more effective. Our characters and our brands represent that wholesome, healthy goodness. Family friendly programming is just a better connection, a tighter fit. To have a co-viewing situation, of generations watching our commercial together, is to our advantage."

Adds Carole Millsaps, manager of advertising for FedEx, "Anyone with children wants to watch shows together with them, and we feel we have a responsibility to help bring that to the marketplace. There was a lack of good shows for families to watch together.

Our customers have families, and they watch these shows."

Some families, perceiving a dearth of family viewing options, may simply tune out. "There are plenty of focus groups and research studies showing that people with big families are turning off the set," says McCarron. "They're scared. Moms are activists now. They watch with their young kids, and once there's a certain amount of offensive language or sexual content or violence, they turn it off. That's a bad thing for advertisers. If someone's going to turn off the TV, why do I want to be on that show?"

The Forum offers an efficient partnership for the broadcast networks. It maintains a fund that underwrites new scripts—which may be suggested by the networks or developed internally—for the networks to consider. If a show is picked up, the network reimburses the fund for its costs on that script. The Forum has no continuing financial or creative interest in that show—though its members are usually keen to place advertising dollars in it.

For a very modest initial outlay, the group has been instrumental in creating 10 prime-time series. Seven of them are still on the air. That's a batting average anyone in television would kill for. "We must be doing something right," says Jacobs.

"They conceived of it in a very smart way," says ABC's Lyne. "They don't try to oversee anyone's development or production; they just underwrite an experiment with a family friendly show. By encouraging the nets to develop more, more family friendly programs end up on the air."

This year, the Forum will extend its reach into the hottest programming genre on television by asking the networks to consider family friendly reality shows. Such programs would be in contrast to the more mean-

spirited or salacious reality series that are often problematic for advertisers. Yet what could be more family friendly than *Survivor* or the red-hot *American Idol*?

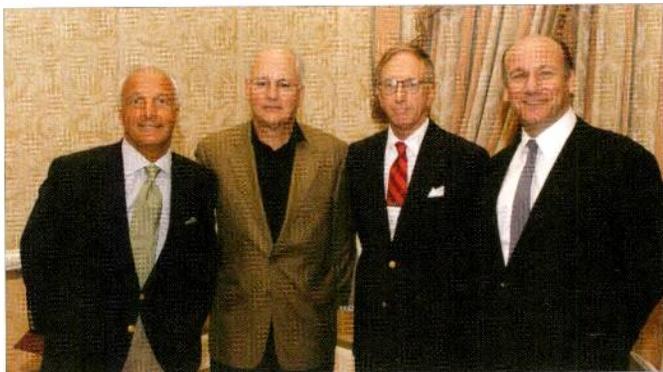
Family friendly shows offer several financial advantages to TV programmers. ABC, for one, has made them an essential part of its programming strategy. "Our rebuilding process gave us an opportunity," says Lyne. "We realized that our audience likes to watch comedies and dramas that reflect their lives—they can laugh and they can empathize—and that this was an underserved audience. Family friendly is a form of broadcasting that advertisers look for. We get very high premiums from clients for our family friendly shows; you may get significantly higher ad dollars for them. For example, we do better with our TGIF [Friday-night] comedies than our competitors do with some harder-edged reality programs that might score higher ratings.

"The reason our CPMs are so high," she continues, "is that you don't have to worry about embarrassing your brand by putting it in a context that devalues it. These are some of the largest advertisers on TV, and they care profoundly about the context in which their brands appear. We open up the opportunity to reach the broadest number of people with these shows." Lyne concludes, "and it has worked out for us."

Joann Ross, president of network sales at CBS, notes that family friendly programming "is a very good business for both sides." CBS has developed several scripts with the Forum and though none has yet made it to the air, Ross believes that her network's schedule is chock-full of family-appropriate shows, from its Monday comedies to *Survivor* to the offbeat hit *Joan of Arcadia*. "This is something that we and the ad community have really embraced," she adds.

"These are all clients we do ongoing business with. Anything that creates a 'halo,' that makes them feel better about network TV, is an enormous positive."

Although the Forum does not officially support cable, some networks are certainly on the same wavelength. The Hallmark Channel has emerged as a noteworthy player in family friendly programming after triple-digit ratings growth for two years running thanks to a lineup powered by M*A*S*H, Touched by an Angel and original movies and specials. "I think family friendly is a good business," says David Kenin, executive vp of programming. "Our brand name is a promise, and we've tried to add more and more programs that are safe for the whole family—no need to worry if someone walks in while you're watching while at the same time keeping it fresh and interesting. That broad



Panelists at the NCFT sponsored symposium on family friendly programming. From left, Joe Abruzzese (Discovery Networks), Nickolas Davatzes (A&E Television Networks), David Kenin (Hallmark Channel), Marty Kaplan (USC School of Communication)

appeal and trust is at the heart of what we do."

"We've partnered in many ways with advertisers who recognize the value of wholesome, quality programming," adds Bill Abbott, Hallmark executive vp of sales. "There are so few networks out there you can turn to 24 hours a day and have no content issues. Viewers always know what to expect from us. Our environment encourages them to stick around.

"Advertisers are very, very happy to be associated with a

brand and a growth story like ours," Abbott continues. "We're not just getting the packaged goods, retailers and pharmaceuticals; we're getting autos, financial services, telecommunications and credit cards. Advertisers are looking for quality programming with broad appeal, and there aren't many places to go that combine brand, environment, high ratings and original production."

Family friendly programming is also enticing to producers like Warren Littlefield, the program boss of NBC in its "Must See TV" heyday. He was brought in by the WB as executive producer on a Forum-backed comedy, Like Family. "This is a great business for producers," says Littlefield. "When you make family friendly, you're not a niche programmer; your aim is a broadcast aim, trying to unite multiple generations in a single show. It gives you real range—you're going for kids, teens

and can score effectively in adults 18 to 49. That's a place the networks want to be. And in terms of the after-market [syndication], you have great flexibility; these shows can play anywhere."

As a former network suit, Littlefield is all too aware of the content sensitivities that can cause advertisers to bolt from a program. "Network antennae are always up on subject matter," he says. "But when you're dealing with family friendly programming, this subject matter is

absolutely embraced by advertisers, not red-flagged. You can do issues like sexual responsibility for teens and put that message out in a responsible way, but it's not creatively restrictive at all. In terms of network headaches, this is not one of those."

Jonathan Prince, creator and executive producer of American Dreams, enthuses that "our show is a huge hit with advertisers."

Prince hopes the creative community will increasingly see the promise of family friendly programs. Too often, he says, "network programs are validated for their extreme choices, even if they fail. You get kudos for edginess. But the opposite of edgy isn't bland. The family friendly people were smart enough to tell the networks to take a risk on something that's not so risky. Look, our show is The Waltons with a cooler soundtrack. At a time when we are becoming a nation of niches, how do you prize the idea of family TV? Programming that pulls people together? That's a value you can't enumerate financially, though you can't believe all the e-mails I get from people saying, 'I watch this show with my kid every week.' It's not embarrassing or humiliating or dumb because it's family friendly; in fact, it's excellent because it's family friendly."

"We're not supporting generic family comedies," agrees Verizon's McCarron. "Look at Gilmore Girls, a story about an unwed mom raising her daughter alone. We're trying to educate Hollywood as to what good family programming could be. We have a lot more to do."

Indeed, none of this year's crop of Forum-backed shows has been a breakout hit, though most hold their own in demos in their time periods. McCarron wants to raise the bar. "The shows we get on the air have to be hits," he says. "Especially in an era of fragmentation and TiVo, I



Dawn Jacobs (Johnson & Johnson), speaking at the NCFT sponsored symposium, August 2003

wouldn't want to put on a bad show, or even a show that's not very interesting. More and more, it has to be a hit." Other items on his to-do list: "We need more elements that appeal to 18-to-34-year-olds in our shows; that's an important audience for many of us. We need a family friendly alternative in every prime-time hour, and maybe even more than one an hour. And we need a hit.

"The easiest thing in the world for TV is to put on reality that appeals to the lowest common denominator and just take the money," he says. "It's too easy to have this awful programming, which means the Forum's job is never done."

"There is a lot more to do," Jacobs agrees. "Some hours just aren't covered. And we've got to get our message out. We need to let consumers, especially moms, know that we've created these alternatives. We need to work with the Hollywood community and let them know what we're looking for. That we're not about censorship, we're about supporting the positive things; we've even got a scholarship program for writers interested in family friendly programming. Sure we've come a long way in five years, but there's never enough opportunity for us."





Family Friendly Programming Forum Awards



Family Friendly Programming Forum Executive Committee gathered at the awards event.

(Top, left to right) Bob Liodice (ANA), Bill Cella (Magna Global), Bill McCarron (Verizon Communications), Marc Goldstein (MindShare), Irwin Gotlieb (MindShare)

(Bottom, Left to right) Barbara Bacci Mirque (ANA), Andrea Alstrup (Johnson & Johnson), Kaki Hinton (Pfizer Inc), Perianne Grignon (Sears, Roebuck & Co.)



Kaki Hinton (Pfizer) and Andrea Alstrup (Johnson & Johnson) welcome guests to the fifth annual Television Awards Show, held on Aug. 14 in Beverly Hills and aired August 25, 2003 on the WB.



Jennie Garth (*What I Like About You*) and Holly Robinson Peete (*Like Family*), hosts of the fifth annual Family TV Awards Show



Cast of *American Dreams* proudly accepts the award for "Best TV Drama".



Kathy Baker accepts award for "Best Original TV Movie"—TNT's *Door-to-Door*. Award was presented by Joe Mantegna (*Joan of Arcadia*)

The fifth annual Family Television Awards Dinner was held Aug. 14, 2003, at the Beverly Hilton Hotel in Beverly Hills and was televised on the WB on Aug. 25. The event was a huge success and was attended by more than 500 guests.

The show was hosted by Jennie Garth of the WB's hit comedy *What I Like About You* and Holly Robinson Peete, who stars in the WB's new comedy *Like Family*.

The Family TV Awards recognize honorees for their contributions to outstanding family entertainment, and they are only awards for which the members of the Association of National Advertisers—major corporate marketers—vote for outstanding programming for family viewing. The 44 major national advertisers that participate in the Family Friendly Programming Forum work to encourage the television community to produce more prime-time shows that families can view together.



Dawn Jacobs (Johnson & Johnson), Bill Cella (Magna Global), Jack Feuer (Adweek), Patty Kerr (Initiative Media) and Stan Kamen



Sherri Shepherd (*Everybody Loves Raymond*), Mark Kaline (Ford), Traci Bingham (*Baywatch*) and Andy Jung (Kellogg)



Carole Millsaps (FedEx), Bill McCarron (Verizon Communications), Lance McAlindon (Procter & Gamble) and Pat Gentile (Procter & Gamble) with presenter Amanda Bynes (*What I Like About You*)

2003 Family Television Award

HONOREES INCLUDE:

- Drama: *American Dreams* (NBC)
- Comedy: *8 Simple Rules for Dating My Teenage Daughter* (ABC)
- Reality: *American Idol* (FOX)
- Original Movie: *Door to Door* (TNT)
- Actor: **Treat Williams**, *Everwood* (The WB)
- Actress: **Patricia Heaton**, *Everybody Loves Raymond* (CBS)



John Ritter and Katey Segal proudly accept award for "Best Comedy" for their work on ABC's *8 Simple Rules for Dating My Teenage Daughter*. Award was presented by Jason, real-life son of the late John Ritter.

 HALLMARK CHANNEL A TOP 10 NETWORK

CLASS ACHIEVER

Some people think that a Top 10 network should offer advertisers exclusive partnerships with 4,300 Hallmark Gold Crown® stores and over 13M loyal cardholders. They're right.



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 HALLMARK CHANNEL A TOP 10 NETWORK

CLASS RANK

Some people think that to catapult into the Top 10 highest-rated networks,
all you need is triple-digit growth in impressions.
They're right.



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Source: Nielsen Media Research. Top 10 Ranking based on Coy AA% for Jan 04 (12/29/03-1/25/04). Rankings are defined Total Day for all Ad supported cable networks and Hallmark's Sales Total Day (MF 8a-3a, Sat 6a-3a & Sun 1p-3a) which excludes non-commercial programming. Triple digit impressions growth based on 2003 vs. 2002 (12/30/02-12/28/03 vs. 12/31/01-12/29/02). Subject to qualifications made available on request.
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Court

TARGET DEMO: WOMEN 25-54

SHOW (SYNDICATOR)	SEASON-TO-DATE RATING	PERCENT CHANGE OVER 2002 SEASON
JUDGE JUDY (PARAMOUNT)	4.0	-9%
JUDGE JOE BROWN (PARAMOUNT)	2.4	NO CHANGE
DIVORCE COURT (TWENTIETH)	2.3	-4%
JUDGE HATCHETT (SONY)	1.8	+20%
TEXAS JUSTICE (TWENTIETH)	1.5	-12%
JUDGE MATHIS (WARNER BROS.)	1.4	+27%
PEOPLE'S COURT (WARNER BROS.)	1.3	+ 8%

After syndicators cranked out years of lower-rated court-show strips like *Judge Mills Lane*, *Curtis Court* and *Moral Court*, the genre has settled comfortably into a smaller grouping, paving the way for more potential success by eliminating the unnecessary clutter. Although there was at least one season when more than 10 court strips battled for audiences at one time, the shows worth keeping continue to prove their worth. And it's the only genre in any medium—network, syndication or cable—where every series will be returning next season, for the second year running.

Season to date, *Judge Judy* from Paramount is still the judge to beat, with its 7.5 household rating a considerable 56 percent above second-place sibling *Judge Joe Brown* (4.8). Among women 25-54, Judy's advantage is an even greater 67 percent. In every female demographic, in fact, *Judy* holds at least a full ratings point lead over *Joe Brown*. Compared to last year, minor losses for *Judy* in households and women 18-49 and 25-54 have been offset by a 12 percent increase among women 18-34.

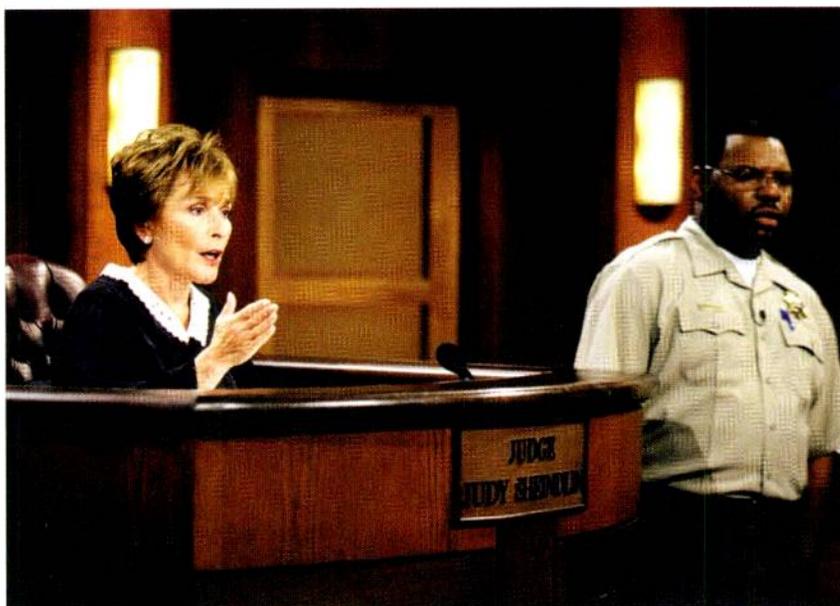
"*Judge Judy* is the *Wheel of Fortune* of court," says Horizon's Adgate. "Ten years from now, we will probably still be talking about it."

Also on the rise are Sony Pictures Television's *Judge Hatchett* and Warner Bros.'s duo *Judge Mathis* and *People's Court*, while *Joe Brown* remains flat from a year ago. Gains for *Mathis* are particularly impressive, with growth of 28 percent in households (1.8 to 2.3) and as much as 50 percent in key demographics. Although Twentieth Television's *Texas Justice* is down by 12 percent in women 25-54 (and 10 percent in households from 2.9 to 2.6), ratings are up modestly in women 18-34 (1.2 to 1.3) and flat among women 18-49 (1.5). Twentieth's veteran *Divorce Court* has also experienced losses of between 4 and 11 percent in its target women demos.

"Right now, there are no worries in court," notes Katz TV's Carroll. "What we have is working and there is no reason to expect anything less next season. Other, more-cluttered genres could take a lesson from court. If you keep the show count down, you are more likely to produce hit shows."

"If every genre was as successful as court, syndication would really be beaming right now," adds Starcom's Caraccioli-Davis.

"Judge Judy is the *Wheel of Fortune* of court. Ten years from now, we will probably still be talking about it." ADGATE



THE BENCHMARK Paramount's *Judge Judy* continues to rule the genre, beating her closest competitor by 67 percent among women 25-54.

Game/Relationship Shows

TARGET DEMO (GAME SHOWS): WOMEN 25-54

SHOW (SYNDICATOR)	SEASON-TO-DATE RATING	PERCENT CHANGE OVER 2002 SEASON
WHEEL OF FORTUNE (KING WORLD)	4.0	+8%
JEOPARDY! (KING WORLD)	3.0	+7%
WHO WANTS TO BE A MILLIONAIRE (BUENA VISTA)	1.9	+36%
FAMILY FEUD (TRIBUNE)	1.4	+40%
PYRAMID (SONY)*	1.3	+8%
HOLLYWOOD SQUARES (KING WORLD)*	1.1	-8%
TARGET DEMO (RELATIONSHIP SHOWS): ADULTS 18-34		
ELIMIDATE (WARNER BROS.)	1.4	-22%
BLIND DATE (UNIVERSAL)	1.3	-24%
EXTREME DATING (TWENTIETH)	1.0	NA
STREET SMARTS (WARNER BROS.)	1.0	NO CHANGE
THE 5TH WHEEL (UNIVERSAL)	0.9	-40%

* CANCELLED

Since game shows are really two genres in one—quiz and relationship—we have broken out the category accordingly, with women 25-54 the target for quiz shows, and adults 18-34 the focus for the late-night-oriented strips.

Among the quiz shows, although King World's perennial *Wheel of Fortune* and *Jeopardy!* remain unstoppable (*Wheel* has now ranked first in all of syndication in households for 80 consecutive sweep periods, or 20 years), it's Buena Vista's *Who Wants to Be a Millionaire* and Tribune Entertainment's *Family Feud* that have broken out this season. Comparatively, *Millionaire* is up 28 percent in households (2.9 to 3.7) and 36 percent among key women 25-54 demographic. The ageless *Family*

Feud has increased by a similar 29 percent in households (2.1 to 2.7) and 40 percent with women 25-54. *Feud* has also grown by 27 percent in women 18-34 (1.1 to 1.4) and 30 percent among women 18-49 (1.0 to 1.3).

"Although the buzz in syndication right now is on *Ellen* and the usual suspects [*Oprah*, *Wheel of Fortune*, *Dr. Phil*], *Who Wants to Be a Millionaire* and *Family Feud* are also two stories worth telling this season," says Katz TV's Carroll. "Both game shows have really found their niche this season."

Despite minor growth for the sophomore *Pyramid*, Sony Pictures Television chose to cancel the Donny Osmond-hosted revival in exchange for time periods for upcoming talk shows *Pat Croce: Moving In* and *Life & Style*. Also expiring after this season is King World's *Hollywood Squares*, which will be replaced on the CBS owned-and-operated stations this fall by Paramount's *The Insider*.

"Always remember that no good game show really ever goes away," says Horizon's Adgate. "We've seen *The Hollywood Squares* and *Pyramid* before and will probably again in the future."

In relationship shows, the once-red-hot *Blind Date*, *ElimiDate* and *The 5th Wheel* have cooled considerably. Universal's *The 5th Wheel* has suffered erosion of as much as 40 percent in women/adults 18-34, making it vulnerable to cancellation.

"You have to remember that television is a cyclical business; what is popular one year could be gone the next," notes Carroll. "Although right now the late-night relationship strips have seen better days, that doesn't mean they won't make a comeback in the future."

"Losses in [the] late-night game [genre] does not concern me right now," says Starcom's Caraccioli-Davis. "There is always an audience for these shows. Right now they just happen to be down."



THE HOT SEAT Buena Vista's *Who Wants to Be a Millionaire*, with host Meredith Vieira, has shown solid growth in its key women 25-54 demo.



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Off-Network Sitcoms

TARGET DEMO: ADULTS 18-49

SHOW (SYNDICATOR)	SEASON-TO-DATE RATING	PERCENT CHANGE OVER 2002 SEASON
FRIENDS (WARNER BROS.)	5.9	-19%
SEINFELD (SONY)	4.5	-13%
EVERYBODY LOVES RAYMOND (KING WORLD)	4.2	-16%
WILL & GRACE (WARNER BROS.)	3.4	-19%
THAT '70S SHOW (CARSEY-WERNER)	3.2	-3%
HOME IMPROVEMENT (BUENA VISTA)	2.5	-4%
KING OF THE HILL (TWENTIETH)	2.1	-13%
FRASIER (PARAMOUNT)	1.8	-18%
DHARMA & GREG (TWENTIETH)	1.6	-27%
BECKER (PARAMOUNT)	1.3	NA
DREW CAREY (WARNER BROS.)	1.2	-20%
JUST SHOOT ME (SONY)	1.1	-21%
STEVE HARVEY (WARNER BROS.)	1.1	-27%
THE HUGHLEYS (TWENTIETH)	0.9	-18%
3RD ROCK FROM THE SUN (CARSEY-WERNER)	0.8	-38%
SABRINA, THE TEENAGE WITCH (PARAMOUNT)	0.5	-29%

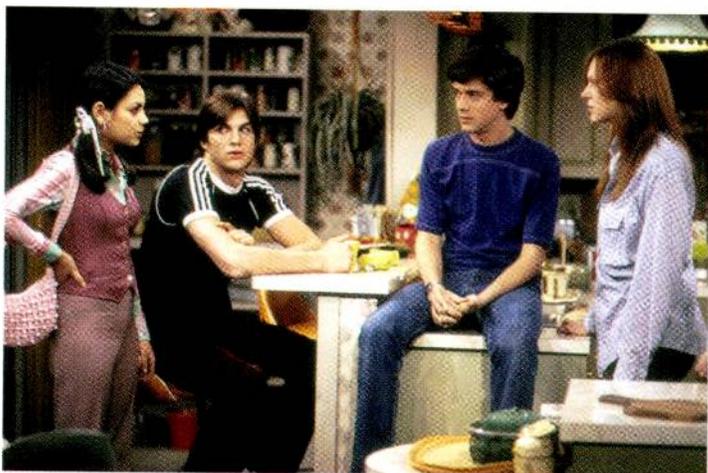
(NOTE: RATINGS FOR SEINFELD, FRIENDS, HOME IMPROVEMENT AND BECKER INCLUDE SIMULTANEOUS CABLE RUNS.)

Considering the broadcast networks haven't had a single new comedy hit break out of the pack in recent years, it's fair to say nothing in the caliber of *Friends*, *Seinfeld* or *Everybody Loves Raymond* is on the horizon in this category. All of the established off-network comedies are down in the target demo of adults 18-49 year to year and only Carsey-

Werner's *That '70s Show* is on the plus side in households. They're all also down in other demographics of note: women, men and adults 18-34, as well as men 25-54. "I can't think of any upcoming off-network comedies that will really make a dent in syndication," says Horizon's Adgate. "Nothing will be able to compete with the top tier."

"Considering a good number of current comedies don't repeat well on the networks, I'm surprised stations are still buying them." CARACCIOLI-DAVIS

"Considering a good number of the current comedies don't repeat well on the networks, I am surprised stations are still buying them," adds Starcom's Caraccioli-Davis. "There never seems to be a station anywhere without them."



BIG STARS Though it's not a winner in household ratings, *That '70s Show* delivers strong men and women 18-34 ratings in its syndicated run.

Although *Friends*, *Seinfeld* and *Everybody Loves Raymond* are in a class of their own in generating household ratings (third-place *Raymond* is 36 percent higher in households than fourth-place *That '70s Show*), *That '70s Show* actually beats *Raymond* in men 18-34 (3.4 to 2.6). The two shows are tied in men 18-49. Meanwhile, *Raymond*, *That '70s Show* and *Will & Grace* only differ by two-tenths of a ratings point in delivery of women 18-34.

Despite the lack of wattage, there is no shortage of sitcoms heading into syndication, with CBS' *Yes, Dear*, Fox's *Malcolm in the Middle* and UPN's *Girlfriends* all rolling out next season. "With UPN and the WB on the air long enough for comedies to reach the magic number of episodes for syndication, the off-net sitcom genre has become particularly oversaturated in recent years," says Katz TV's Carroll.

Disappointing results for Paramount's *The Parkers* this season could be the precursor to other potential failures. "The comedies with legs in off-net syndication are the ones that are well-written, well-acted, well-produced and worth revisiting," says Adgate. "Until the broadcast networks can reverse the current pattern, this downward trend in syndication is likely to continue."

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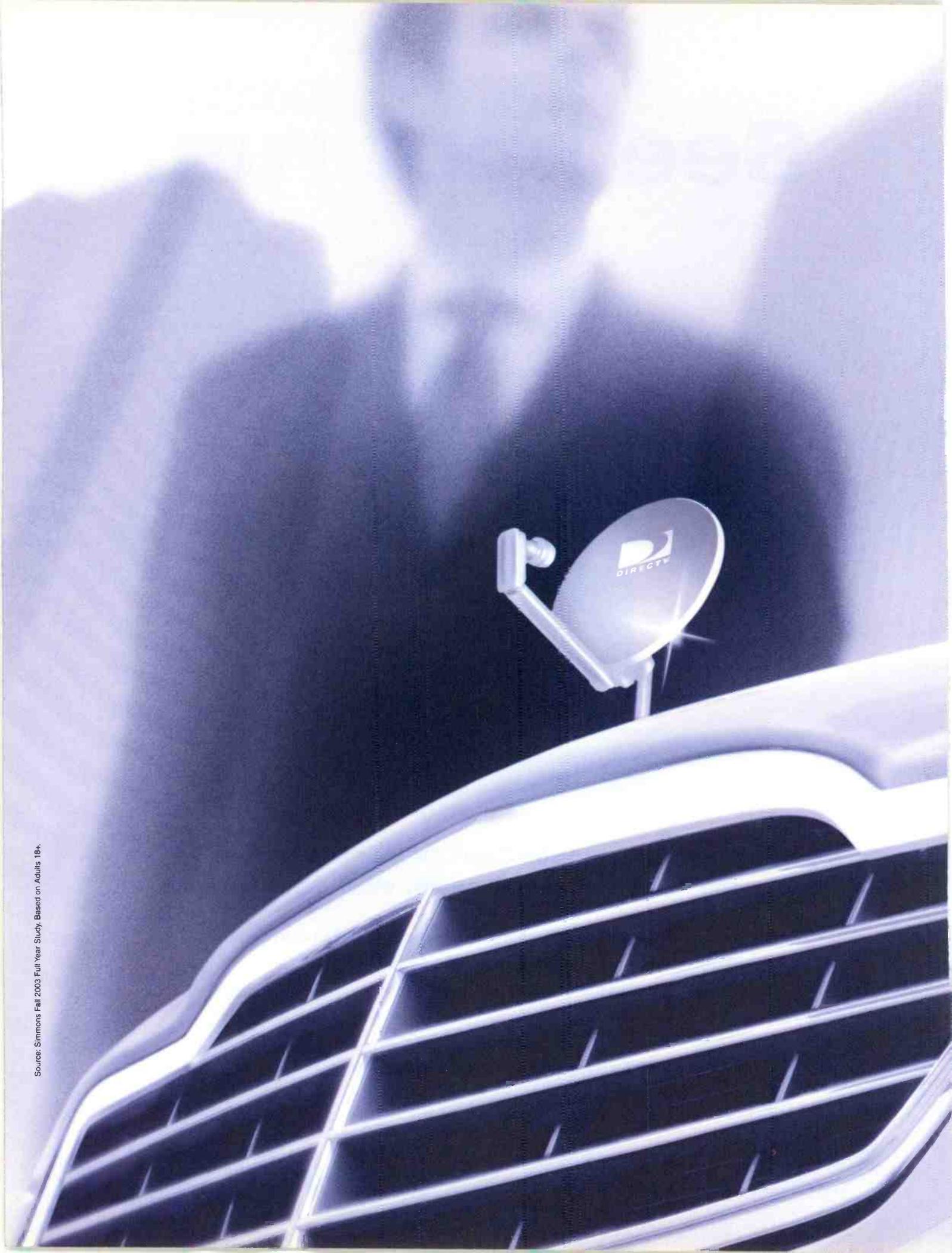
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Source: 1&2 Nielsen Media Research, A18-49, M-Su 8p-11p, Ad Supported Cable Networks with 50+MM subs 1. Court TV analysis of NPower, min x min, 11/03, week #4, program min vs. non-program min 2. Length of Tune 11/03 3. 2003 MRI Doublebase, indexed to Total US, A18-49, full attention to any program available. Ad-supported networks with 50+MM subs. Qualifications available upon request.

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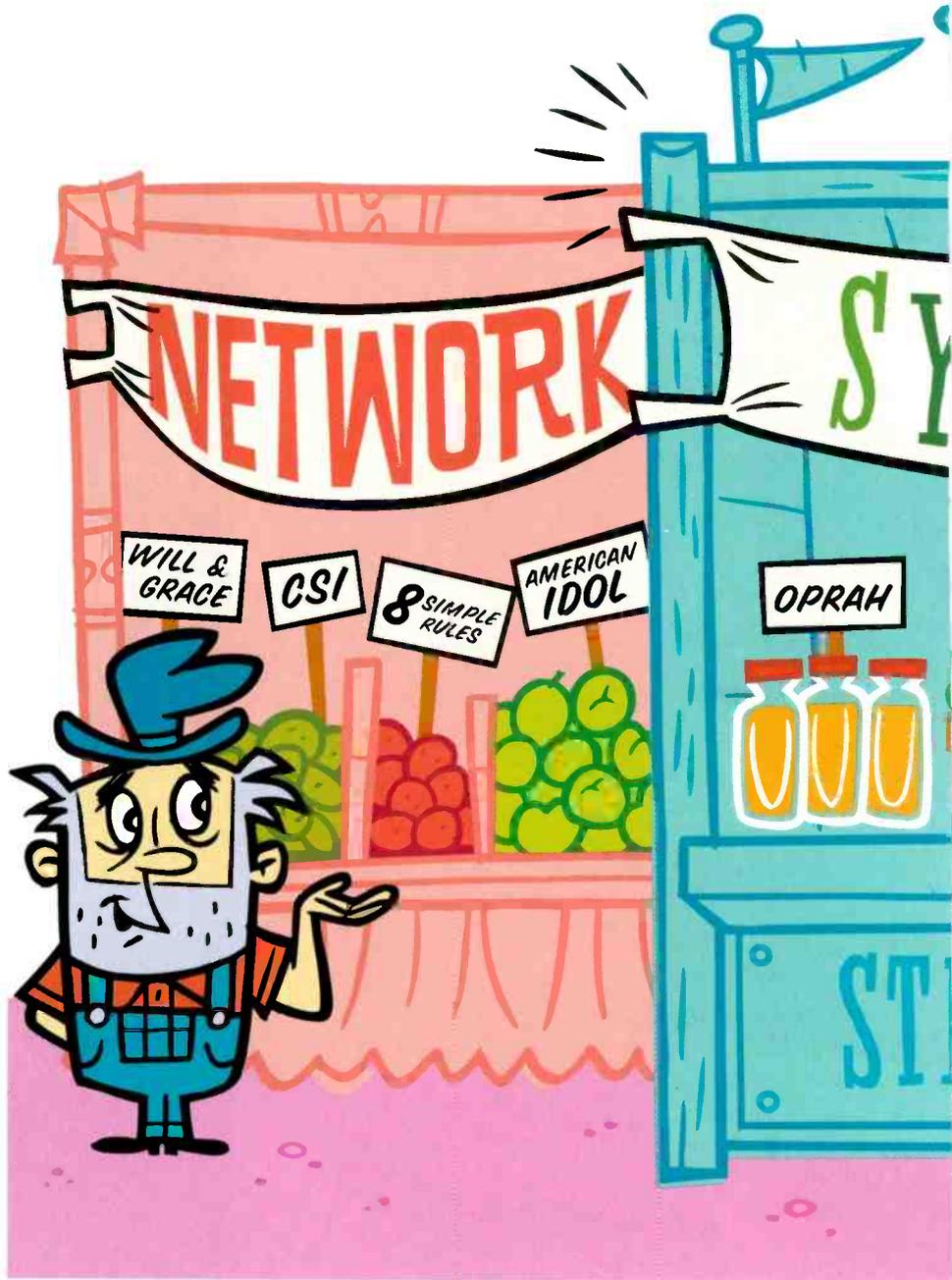
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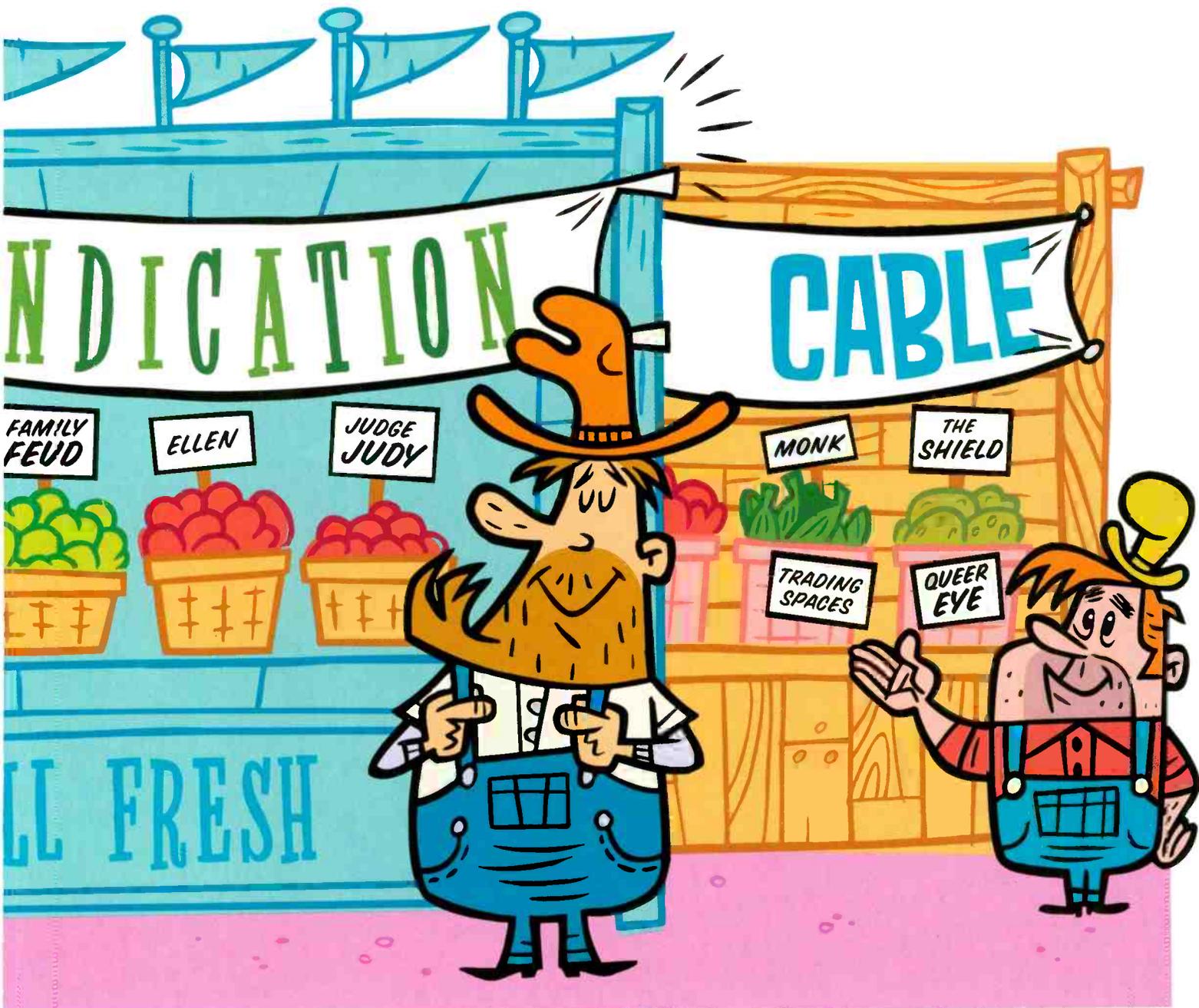
BY ERIC SCHMUCKLER

ILLUSTRATION BY STEVE WACKSMAN



Cosmic forces are at work in the media universe. As buyers and sellers begin contemplating this spring's upfront selling season, there has been a lot of loose talk that clients and their media agencies—confronted with spiraling network costs, shrinking ratings and rampant reality—will move advertising dollars from the networks to cable, to the tune of \$1 billion.

It's a mythical figure, that billion bucks. No one has a clue what demand will be or how serious clients and agencies are about utilizing alternatives to the nets, and to television in general. (Cynics say clients will never let go of their network safety blankets.) Are we truly on the verge of an historic shift of dollars from network to cable?



Wait a second, say the sellers of syndication. Striving to shed their image as the neglected middle child of the media biz, they will come out with guns blazing at the Syndicated Network Television Association conference in New York on March 11. Let's leave the competing claims of network and cable sellers for another day and listen to syndication advocates make the case that their medium should win a hefty slice of any presumed shifting dollars. Many buyers agree that syndication stands to benefit, though some voice doubt about costs. And several note that syndication is too heterogeneous to make such blanket statements.

"I don't think [advertisers] are really taking a billion dollars from

network," says Marc Hirsch, president of Paramount Advertiser Services. "But if there is indeed a shift of funds, I'd hope and expect some of it to wind up in syndication. Why go from point A to point C? What about point B? We're closer to network than cable is in every way, shape or form."

"If broadcast is too expensive, where do you go?" asks Howard Levy, exec vp of Buena Vista Television Advertising Sales. "We [syndicators] should be the first recipient. We're a great cost reducer in some dayparts, but we also have high ratings. In cable, you're buying a lot of 0.2s and 0.3s. If you're replacing something, you wanna get as close as possible to what you had. If you're used to driving an \$80,000

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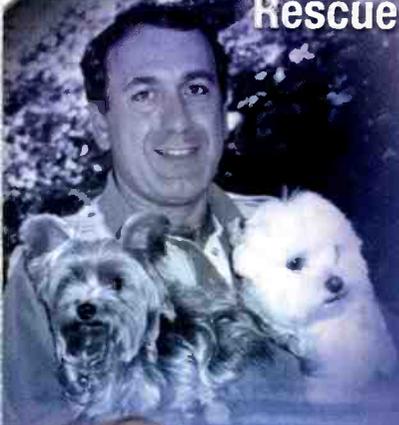


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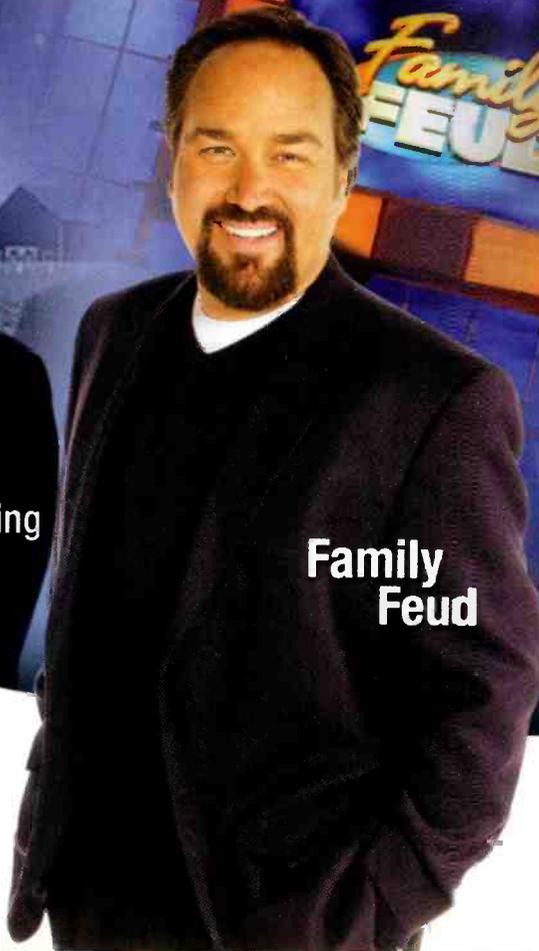
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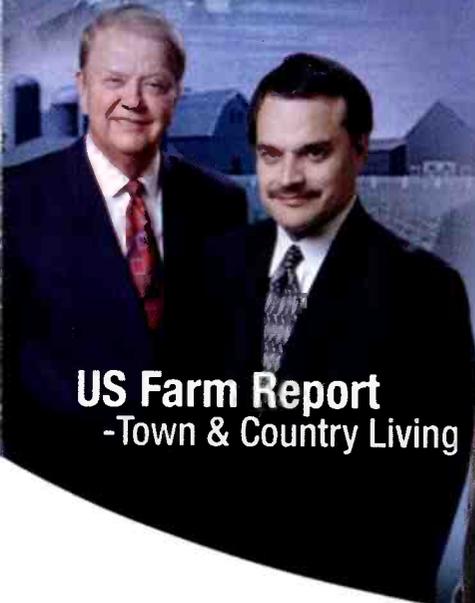
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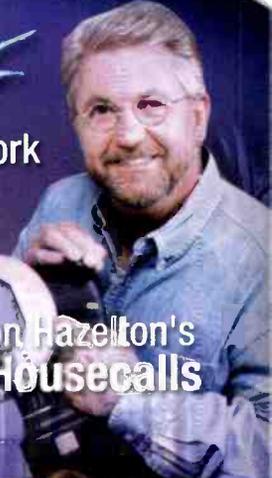


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"The last two upfronts were relatively healthy for syndicators, as advertisers saw the value of this medium and began to funnel money to it," says Chris Kager, president of MGM/NBC Media Sales. "The beauty of syndication is that you know where you're running—you won't be given a new show after six or eight weeks. In network, there's a pretty good chance you'll get a makegood for the makegood, while our shows are on the air 52 weeks a year and viewers watch them day after day. There's a value to that. In a sea of turmoil, syndication brings you a lot of tranquility."

Adds Bo Argentino, exec vp of advertiser sales for Sony Pictures Television: "Agencies can evaluate us show by show, rather than airing in a rotation across dayparts. You can't do that 99 percent of the time with our counterparts."

"Our ratings are more consistent quarter to quarter [than the nets]," says Bob Cesa, exec vp over barter advertising and cable sales for Twentieth Television. "If you're a planner, you know we'll be on five or six days a week; if you're looking at second and third quarter on the networks, who knows what you'll get. Syndication is a reach medium and that's what's becoming scarce. If money goes elsewhere, you've got to look at us."

Syndicators enjoyed a spectacular upfront last year, with CPM gains of some 15 to 18 percent for top-tier programs, 10 to 15 percent for the mid-tier and 5 to 10 percent for the lower tier. Total dollars



"If you're used to driving an \$80,000 Mercedes and don't know if you can afford it anymore, syndication is like a Lexus and cable's a Camry. What are you going to drive?" LEVY

jumped 15 percent, from \$2 billion to \$2.3 billion. "There were six percent more GRPs in syndication in calendar '03 versus '02, according to CMR," says Mitch Burg, newly installed SNTA president. "We represent half of all daytime viewing, we dominate in prime access and syndicated properties beat local news in late night. We've got strong ratings, ratings growth, border-to-border coverage, quality programs, the most popular TV personalities. Frankly, it's an undervalued, underappreciated medium." And this guy's only been on the job a few weeks.

While some syndicators talk about ratings growth, overall results are mixed and under the same downward pressure as the broadcast nets. Of the top 20 returning shows in adults 18-49, 11 were down, seven were up and two were flat in fourth quarter '03, according to a study by Magna Global. *Oprah Winfrey*, *Dr. Phil*, *Judge Joe Brown*, *Entertainment Tonight Weekend* and good ol' *Cops* were double-digit gainers, while every returning off-net sitcom was down. The only new show to crack the top 20, *King of Queens*, is not considered elite. And while everyone loves *The Ellen DeGeneres Show*, it was only the 76th ranked show among women 18-49, in the bottom half of the daytime pack.

To what extent is syndication a replacement for network prime? The likeliest suspects are top sitcoms *Seinfeld*, *Friends* and *Everybody Loves Raymond*, plus maybe *Wheel of Fortune* and *Jeopardy!* for older demos. "Our advertisers look at these shows as a prime-time alternative, but they're generally more expensive than your average prime cost," says Peter Butchen, senior vp/group director for Initiative Media. This prime-time alternative is a limited one, he says. "Viewers won't be going from the broadcast nets into *Seinfeld* repeats. The big shift of eyeballs is to cable, and we think advertisers will shift with the eyeballs. That gets your ad budgets in line with the way viewers actually watch TV, and media inflation is held down."

"One could argue that some top-tier off-net sitcoms should be priced higher than network," muses Jon Mandel, co-CEO of MediaCom. "It's clean, reliable and less likely to be TiVo'd. Last year, some syndicators of top-tier stuff were shocked at the demand—people were running from reality, and with off-net, you know what you're getting. But I think top-tier off-net is probably fully priced now, so if money is moving from the networks because pricing is out of whack, then those syndicators will have to react."

In daytime, syndication is already the equal of network, "and our pricing on women 18-49 is, in some instances, in excess of network daytime," notes Argentino. One buyer

HOT TICKETS
After eight years in off-net, *Seinfeld* (right) remains a big draw for advertisers. *Live with Regis & Kelly* (below) commands a higher ad rate than some daytime soaps.



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"Viewers won't be going from the broadcast nets into *Seinfeld* repeats. The big shift of eyeballs is to cable, and we think advertisers will shift with the eyeballs." BUTCHEN

points out that *Live with Regis & Kelly* can cost more than *The Young & The Restless*. Late night offers not only mid- and lower-tier off-net but also a bunch of relationship/dating shows that are "young-skewing, if you can get past the content," says a buyer.

Several buyers believe syndication has a clear opportunity in any shift of network dollars. "If we don't agree with network pricing, we'll look to move money to other options, and syndication is one of those," says Andy Donchin, senior vp/director of national broadcast at Carat. "We've always used syndication as a complement to network, and maybe we look at that a little more. Unless their pricing gets out of line."

"How do I sustain my reach and get more [gross ratings points] in an efficient manner?" asks Donna Speciale, president of U.S. broadcast at MediaVest. "Cable is not the only answer; syndication could be a part of that answer."

But the question is more complicated than a straight-up shift of dollars. "You have to look at what happens to syndication in each day-part—in daytime, in prime time," says Speciale. "It's not necessarily affected by a shift of money to cable. Their pricing is really affected by what goes on in network. And syndication's top tier hasn't grown, so the limited top-tier stuff is really pricey and they have more lower-tier stuff to worry about."

"If advertisers come in with as much money as last year and are willing to shift to different vehicles within TV, then syndication will benefit," says Terry McKinzie, assistant media director at Starcom USA. "Syndicators definitely benefited from the heat of the network market for the past two years, when some people couldn't get all their network dollars down. But I don't know if syndication can improve its performance relative to network—I think they'll always be in lockstep. I'd imagine that if network dollars are down, syndication dollars will be down too, or flat at best."

McKinzie is not terribly encouraged by new syndicated fare. "Everything this year is lukewarm," she says. "The biggest off-net comedy is *Malcolm in the Middle*, there's *Fear Factor*, which is tough to buy for a lot of clients, and we need to see [more] clearances on *Tony Danza*. And I have concerns that the start-up costs and high production values of the newer daytime shows—*Ellen DeGeneres*, *Wayne Brady*, *Jane Pauley*—can start to make these shows prohibitive, particularly for a packaged-goods client looking for efficiency."

"A great viewing experience will cost more, but it's a great advertising environment as well," Levy replies. "I don't think these shows are so pricey that they can't be part of the mix."

"Any time the networks face a stiff wind, it's not good for syndicators," says Ray Warren, managing director of OMD. "They tend to ride the coattails, and last year they won CPM gains that weren't necessarily warranted, in my opinion. But in a different market, the buying community will react differently." Will syndication capture those allegedly cable-bound dollars? "If you want a 4 or 5 rating in syndication, you're not paying a cable CPM," he says, "and there's a lot of 0.8-rated syndication too. But none of this is a given. Money may shift from network to radio or from syndication to outdoor. If TV is a less relevant part of a consumer's day, those are bigger issues."

"Every deal is so different—by client, by syndicator, by property," says Mandel. "Some properties could gain if the price/value relationship is there. For some clients, *E.T.* is fully priced, and for some it's underpriced. The guys who really have to watch it are the second-tier off-net pretending to be first-tier. For a long time, syndicators selling top-tier stuff have tried to tuck in just under network, so if the price/value of network is messed up, the same goes for those syndicators."

One thing that concerns Mandel is the packaging of less-desirable shows with the upper-tier programs: "If I want, say, *Regis & Kelly* because it's demographically and psychographically right for my client, and you say, 'Buy my movie package, too,' you may have lowered my price overall but you've raised my cost psychographically. I wonder if syndicators are a little slower as a group than cable to pick up on the nexus between planning and buying."

"I can understand the psychographic appeal," responds Paramount's Hirsch, "but no one is out there buying *Trading Spaces*, for example, without taking everything else on that network; most of your delivery is spread across the board. You're buying a lot more that's less targeted and watering down a very specific audience. The idea that we package and they don't is wrong."

"The amount you would spend in movies versus *Regis* is minuscule," adds Cesa. "When we deal with an agency, they have a mega number of clients. Maybe one or

two bought a spot or two more than they wanted of something, but they probably got a concession somewhere else."

While the relative values of various shows will be debated and negotiated, several buyers express backing for the medium. "We're a really big supporter of syndication because that's what our optimizers told us," says Starcom's McKinzie. "We certainly put our share of dollars toward the vehicle."

"Look, syndication is extra work because the delivery system is not as clear-cut," says Butchen. "You've got double runs, cable runs, gross-average audience versus average audience, weekday/weekend combos, monthlong movie windows—it's a more complicated business model than network or cable." (Don't forget network's constant schedule changes and cable's rotations, note syndie sellers.) "A lot of people are busy and don't want to be bothered, and I'd bet for many advertisers that syndication is definitely underrepresented. The more money spread over more properties ultimately lowers everyone's price." ■

"If there is indeed a shift of funds [out of broadcast], I'd hope and expect some of it to wind up in syndication. Why go from point A to point C? What about point B?" HIRSCH



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ABC Radio - Washington, DC

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Rahway, New Jersey, 07065
attention: EVP Marketing
or email pfelb@optonline.net

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Resumes to jobs@alloy.com

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GlaxoSmithKline, the industry leader in direct-to-consumer advertising of prescription pharmaceuticals, seeks an experienced media professional. Located in RTP, NC or Philadelphia, PA the position will advise brands on consumer and professional media planning and buying strategy working in tandem with media planning and buying agencies. The position requires a minimum of seven years of media planning and/or buying experience across multiple media including consumer and trade, e.g. national broadcast, local broadcast, print, internet, OOH, direct response, etc. Knowledge of pharmaceutical industry preferred, including experience with in-market testing, research, and ROI performance. Candidate must have the ability to work cross-functionally with internal and external constituents.

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box number; (2) In a separate note, list companies and subsidiaries you do not want your reply to reach; (3) Enclose both in a second envelope addressed to CONFIDENTIAL SERVICE, Adweek, Classified Advertising, 770 Broadway, New York, NY, 10003. If ADWEEK must typeset ad, charge is \$25.00. Deadline for all ads in ADWEEK EAST is Wednesday, 4:30 p.m. If classified is filled prior to closing, ads will be held for the next issue. Classified is commissionable when ad agencies place ads for clients. No proofs can be shown. Charge your ad to American Express, Mastercard or Visa. ADWEEK CLASSIFIED, 770 Broadway, 7th fl. New York, NY 10003. 1-800-723-9335 Fax: 646-654-5313.

Culture Trends

NIELSEN MEDIA RESEARCH

AD SPENDING - FOOTWARE

Footware ad spending by media industry.

January-October 2003

Medium	\$(000)
Cable TV	56,934,773
Hispanic Network TV	2,134,888
Local Newspapers	1,048,262
National Magazines	193,801,680
National Newspapers	1,150,757
National Sunday Supplement	1,070,254
National Radio	100,531
Network TV	79,572,350
Outdoor	2,890,299
Spot TV	15,313,983
Syndicated TV	4,078,151
TOTAL	361,289,938

SOURCE: Nielsen Monitor Plus

THE HOLLYWOOD REPORTER'S BOX OFFICE

THIS WEEK	LAST WEEK	PICTURE	WEEKEND GROSS	DAYS IN RELEASE	TOTAL GROSS
1	NEW	THE PASSION OF THE CHRIST	83,848,082	5	125,185,971
2	1	50 FIRST DATES	12,565,729	17	88,683,963
3	NEW	TWISTED	8,904,299	3	8,904,299
4	2	CONFESSIONS OF A TEENAGE DRAMA QUEEN	6,346,941	10	16,905,932
5	NEW	DIRTY DANCING: HAVANA NIGHTS	5,811,325	3	5,811,325
6	3	MIRACLE	4,469,617	24	56,328,330
7	5	EUROTRIP	4,051,428	10	12,758,176
8	4	WELCOME TO MOOSEPORT	3,279,764	10	11,539,863
9	6	BARBERSHOP 2	3,125,536	24	57,575,543
10	NEW	BROKEN LIZARD'S CLUB DREAD	3,035,688	3	3,035,688

For week ending February 29, 2004

Source: Hollywood Reporter

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Calendar

The **Association of National Advertisers** will present the **2004 Television Advertising Forum** March 10 at the New York Marriott Marquis Hotel. Agenda includes sessions on client perspective, audience measurement, federal regulation. Contact: Joanne Forbes, 212-455-8086 or jforbes@ana.net.

American Business Media will present the **"What B-to-B Advertisers Want"** seminar March 10 at the Scholastic offices in New York. Contact: Jane O'Connor, 212-661-6360, ext. 3332.

The **Syndicated Network Television Association** will present the first of its **spring conferences** March 11 at the Grand Hyatt Hotel in New York. For more information, visit www.snta.com.

The **National Association of Black-Owned Broadcasters** will host its annual **Communications Awards Dinner** March 12 at the Marriott Wardman Park Hotel in Washington, D.C. Contact: 202-463-8970.

The deadline for **entries to the Radio-Mercury Awards** for creative excellence in radio commercials has been extended to March 15 to accommodate demand from advertisers, agencies, production firms and stations. Registration is available at www.radiomercuryawards.com or by calling 212-681-7207.

The **Television Bureau of Advertising annual marketing conference**, in conjunction with the New York International Auto Show, will be held April 15 at the Jacob Javits Center in New York. Mark LaNeve, general manager of General Motors' Cadillac division, will be the automotive keynote speaker. Contact: Janice Garjian, 212-486-1111.

The **National Association of Broadcasters** will present its annual **conference and exhibition** April 17-22 at the Riviera Hotel and Casino in Las Vegas. Sessions will cover content creation, management and delivery of electronic media. Also on the agenda: the first constitutional meeting of the Independent Spanish Broadcasters Association. Contact: 202-429-5300.

inside media

NEWS OF THE MARKET

USA Plans Olympics Coverage

Once GE/NBC's acquisition of Universal's cable assets is complete, USA Network plans to carry 23 hours of U.S. Olympic Trials coverage on 11 consecutive Saturdays from May 22-July 24, along with weeknight broadcasts of the trials in July. In addition, major U.S. Olympic Committee events, such as the U.S. Olympic Hall of Fame Induction ceremony, will run on the cable network. Olympic trials in track and field, wrestling, men's and women's volleyball, synchronized diving, equestrian-jumping, water polo and weightlifting will be among the competitions televised. USA is expected to pick up some Olympic events too. The cable net is available in 86 million U.S. TV households.

Auto Biz Boosts '03 Outdoor Spending

Outdoor advertising surged in fourth quarter 2003 to end the year up 5.2 percent to \$5.5 billion, according to figures released last week by the Outdoor Advertising Association of America. Local services & amusements—the highest-spending category, accounting for more than 14 percent of the total—was up 11.8 percent. The biggest gain came in the automotive category, which increased spending by 34.3 percent. Other categories posting sizable increases were financial, up 23.8 percent, and insurance and real estate, at 20.2.

ESPNews Hits 40 Mil Subs, Adds Blocks

ESPNews passed the 40 million-subscriber mark on March 1 with 40.3 million subscribers, thanks in part to ESPN's affiliate sales team recently putting more effort behind it. ESPNews also announced two new weekday sports-news blocks. The Hot List (3-6 p.m.) provides coverage of breaking news in order of overall significance, and 4 Qtrs (7-8 p.m.) delivers top sports news with different perspectives every quarter hour. ESPNews also reaches an additional 10.5 million homes on a part-time basis via five regional sports nets: New England Sports Network; Comcast Sports Southeast; Metro Sports in Kansas City, Mo.; Louisiana's Cox Sports TV; and Minneapolis-based Victory Sports Network.

Wired to Host NextFest Tech Expo

Condé Nast's *Wired* will convene NextFest, an exposition exploring the future of technology, from May 14-16 in San Francisco. Along with the expo, *Wired* will publish a 22-page special feature in its June issue and air a one-

hour TV special on the Discovery Channel. General Electric will be the presenting sponsor, and other sponsors include Hewlett-Packard, T-Mobile and Motorola. *Wired* reports the event has generated more than 65 incremental ad pages.

Lifetime Renews *Missing*, With New Lead

Lifetime Television has renewed its drama series *1-800-Missing* for a second season, with Vivica A. Fox replacing Gloria Reuben in the lead role. The series will continue to run Saturdays at 10 p.m. Lifetime also recently announced a second-season renewal for its *Wild Card* drama, which is paired with *1-800-Missing* on Saturday nights.

Sat Radio Services Roll Out Traffic Reports

Sirius Satellite Radio and XM have begun providing around-the-clock local traffic and weather reports for the nation's largest cities. XM launched reports for 15 top markets on 15 dedicated channels, with another six markets planned for later this year. Sirius launched reports for New York and Los Angeles and plans to add reports for another 18 markets by the end of the month. Sirius will devote one channel for every two markets. Broadcasters vehemently oppose the moves, arguing that they violate the satellite companies' national license charters from the Federal Communications Commission.

Cumulus Adds Stations in Missouri

Following its recent entry into the Kansas City radio market, Cumulus Media has announced a deal to purchase seven stations in two nearby Missouri markets from Premier Marketing Group for \$38.75 million. The deal gives Cumulus four stations (KFRU-AM, KBXR-FM, KOQL-FM and KPLA-FM) in Columbia, market No. 251, and three stations (KLIK-AM, KBBM-FM and KJMO-FM) in Jefferson City, the state's capital.

Arbitron to Shutter Webcast Ratings

At the end of this month, Arbitron will cease publishing its weekly and monthly Webcast ratings reports based on the MeasureCast technology it acquired in late 2002. "The investment needed to sustain the [service] would have been far greater than the revenue potential," said Pierre Bourvard, president of Arbitron new ventures. The ratings firm will continue to conduct its regular studies of the Internet broadcasting audience. ■



SETTING:
In The Park

MS. HALSTEAD:
Sarah was not the type to have an affair.

LENNIE:
My experience is it's an equal opportunity character flaw.

Feel The Drama?
So Do The Viewers.

LAW &
ORDER



SHOW
TIMES

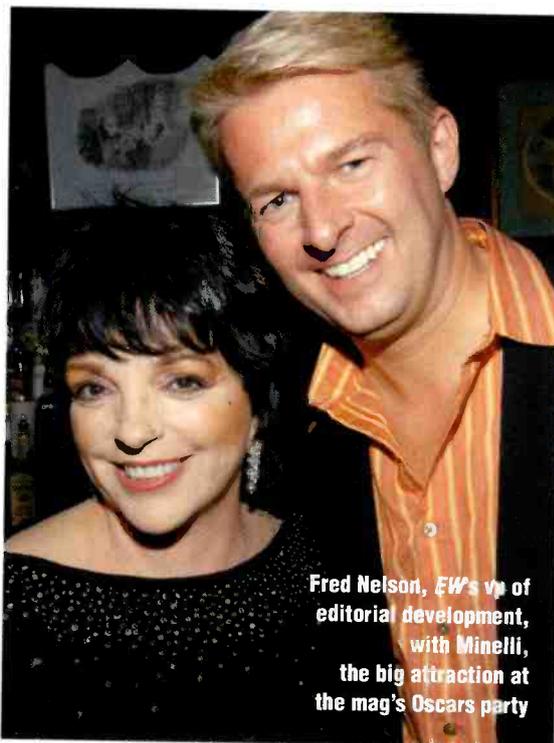
M-W 7, 8 & 9PM(ET)
FRI 7PM(ET)

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media elite

EDITED BY ANNE TORPEY-KEMPH

Quicktakes



Fred Nelson, *EW's* vp of editorial development, with Minelli, the big attraction at the mag's Oscars party

MORE INTERESTING THAN THE OSCARS show itself, with its sweep of as-predicted winners, were the myriad ways that media companies marked the occasion. **Architectural Digest** accommodated celebrity presenters in Hollywood-atelier style in the *AD* Greenroom. **Organic Style** provided a chauffeur-driven SUV from EVO, the eco-friendly luxury car service, to all of *The Lord of the Rings* hobbits, including Elijah Wood (also notable: *OS* gift bags to the chauffeurees included airline tickets and biodegradable underwear). **Entertainment Weekly** hosted its usual Oscars bash at Elaine's in New York, where guest Liza Minelli drew admirers, paparazzi caught comedian John Leguizamo feeling up the Oscar-statulette ice sculpture, and *EW* editorial director **Pete Bonventre** hobnobbed with **Dave Zinczenko**, editor of *Men's Health*, and his longtime girlfriend, **Rose (Charmed) McGowan**. But shock jock Howard Stern was a no-show, supposedly because he didn't want to talk about getting bumped off several Clear Channel stations for indecency violations. Meanwhile,



Champion of children's arts programs: Uva

TV Guide Channel left the Oscar-partying to some deserving Marines. The cable net gave the 12 VIP red-carpet viewing seats it had received from the Academy to a group of Marines just back from serving in Iraq...At the recent Cartoon Network-Kids' WB! upfront presentation in New York, the nets' executives barely dodged a dousing by celebrity special guest **Comet**. The "pissing" pug is the provocateur in Kids' WB!'s new hidden-camera show in which Comet's carrier stops someone in a park or mall to, say, ask for directions, and the pooch lets loose (from a squirting water bag hidden between his legs). And somebody actually gets paid to come up with these ideas...**Joe Uva**, CEO of OMD Worldwide, was co-honoree with actor Matthew Modine at last week's Children's Arts Medal Benefit, hosted by Young Audiences New York at the Marriott Marquis. But **Hank Close**, senior vp of national sales for Comedy Central, walked away with the event's biggest prize: a day of golfing with Uva and a set of Taylor Made clubs for the occasion. Close apparently succumbed to the persuasive prompts by auctioneer **Larry Divney**, coincidentally his boss, ponying up the winning bid of \$9,000...A study released recently by **Ball State University** found that telephone surveys and personal diaries underreport by a wide margin how much media Americans consume. The university's Center for Media Design observed the media habits of 101 people and found that media use was more than double what was reported by standard survey research methods. Phone surveys were particularly useless, the study concluded. "You might as well throw darts," said Bob Papper, a Ball State telecommunications professor and study co-author.



Mel Berning
Executive VP/Ad Sales, A&E TV Networks

Mel Berning has the advertising marketplace covered. Since he began his career in 1980, Berning has jumped from one side of the negotiating table to the other—serving both ad agencies as an account executive and TV networks in the sales department.

He got his feet wet in the media department of Benton & Bowles, surrounded by current ad-agency heavyweights Marc Goldstein, North America CEO at MindShare, and Irwin Gotlieb, CEO of Group M, which oversees MindShare and Mediaedge:cia. In 1981, he joined CBS as director of sales and competitive analysis, then went to NBC as senior vp/pricing and planning (14 years), and on to MediaVest USA for four years as president of U.S. broadcast. Berning switched sides again on Jan. 1 to join A&E, where he's in charge of sales at A&E, The History Channel and Biography Channel.

Why? "On a personal basis, you can have a lot of fun in a place like this," Berning says. "Though we have a corporate parent, we are still an independent and can focus on being entrepreneurial."

Berning has already proved himself an effective agent of change in the two months he's been at A&E. Having vowed to reignite AETN's sales energy in the marketplace, Berning has reorganized his sales team (see details on page 9) and has made an impression on the media-buying community that AETN isn't just selling spots and dots but truly seeking integrated solutions for advertisers—the importance of which he learned early during his early days at B&B, he said.

"On the agency side, you can be very creative, but...I love the sell side," he says. "The difference isn't so great between buying and selling, but for me, what is great about selling is that you are focused on one brand so you can really hone in on it and make it shine."

When Berning isn't wheeling and dealing in the city, he's chasing his son and daughter and two brown Labrador retrievers around the house. How about hobbies? "Isn't that enough?" he asks. —Megan Larson



PHAT TIME:

At *Stuff* magazine's Mardi Gras party at The Howling Wolf in New Orleans, (l. to r.) Michael Provus, *Stuff* publisher; Nicole Atallah, media planner, Universal McCann; Lena DerOhannessian, media supervisor, Universal McCann; and Aric Webb, *Stuff* associate publisher of marketing



SETTING:
Jerry's Apartment

GEORGE:
You don't think she'd yada yada sex do you?

ELAINE:
I've yada yada'd sex before. I met this guy. We went out. I had the lobster bisque. We went back to his place. And yada yada. Never heard from him again.

JERRY:
But you yada yada'd over the best part.

ELAINE:
No, I mentioned the bisque.

**Think It's Funny?
So Do The Viewers.**

Seinfeld

TBS

SHOW
TIMES

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Direct Deposit

After years of failing to make the Web a viable source for subs, publishers finally are having some success

IN THE FALL OF 2000, THEN-AOL TIME WARNER CO-COO BOB PITTMAN STUNNED PUBLISHERS at the annual magazine conference, boasting that the company was generating 100,000 subscriptions a month through America Online for Time Inc. titles that included *People*, *Fortune* and *Sports Illustrated*.

But it was never revealed how many readers were actually converted to paying customers. And to many publishers who wound up testing AOL's strategy, the numbers proved too good to be true. Since then, both the hype—and Pittman—have been extinguished, and publishers, including Time Inc., have taken a

more sober approach to the Web.

sites, leaving the rest for free. "It used to be the sites were pushed by ad sales to generate inventory, but now the key relationship at Time Inc. is between the consumer marketers and the editors on the Web sites, and the editors in print," says Ned Desmond, executive editor of Time Inc. Inter-

active. "There's a very carefully thought-through use of the sites to build something that really rewards the subscriber and becomes a super destination for potential subscribers."

While not divulging any figures, Desmond notes that for those titles in the AOL deal, "it's worked out moderately well." For Web sites outside the AOL curtain, the results, he says, have been "pretty dramatic."

Fortune, for example, has seen between threefold and fourfold improvement in net subscriptions, those subs that are paid.

Among the most successful generators of subscriptions online is *ESPN The Magazine*. ESPN executive vp John Skipper happily reports that the magazine scored 50,000 subscriptions last year just from ESPN.com. On top of those orders, the magazine's \$40-per-year ESPN Insider site, which offers readers specialized sports news, has been a subscription bonanza. Last July, ESPN changed the Insider program, converting the 120,000 Insider subscribers so that they also now receive the magazine; since then, ESPN has added 80,000 more readers. (Subscribers who sign up via traditional methods—i.e., insert cards and direct mail—have never had free access to Insider.) As a bonus for *ESPN The Magazine*, those 200,000 subs have been accepted as paid subscriptions by the Audit

Bureau of Circulations; they were reflected in last year's second-half publisher's estimates.

"It works well for us," says Skipper. "I can replace other magazine sources, which are more costly, and they're high-quality orders because they are already ESPN guys." The retention rate, he says, is 75 percent. Paid circulation in last year's second half grew 13.5 percent to 1.76 million versus the year prior.

TV Guide has also seen solid numbers. "We anticipate in 2004 that the Web will become our largest source of new subscriptions," says Chuck Corday, *TV Guide* senior vp/consumer marketing. "Currently, only direct mail is bigger." *TV Guide's* paid circulation was flat at 9 million.

Prior to a redesign last September, the *TV Guide* site generated 500 subs a week. (Previously, the site didn't even display a copy of the magazine.) The user-friendly revamp, which is free to all, has helped grow orders tenfold to 5,000 per week, says Corday. By June, Corday expects another 50 percent bump in weekly subs sold online. While *TV Guide* has been testing a tier strategy—giving some prospective readers free offers and others a variety of sub prices, from \$20 for 26 issues to \$13 for a full year—the magazine is also testing reader-participation incentives. The more information a customer provides online, the more information *TV Guide* will make available. A Web site upgrade that will include elements of the tiering strategy is due in late second quarter.

Media buyers see no problems with Web-driven subs. "Consumer habits are moving to the Web, so therefore, it's more of a natural way to get readers," says Robin Steinberg, Carat USA vp/print director. "Instead of publishers hounding them on the phone, or by mail, they were there and they signed up." —LG

Bridal Shower

EB to carry 155 ad pages

Beginning March 16, Fairchild Publications will be wooing brides-to-be with *Elegant Bride*, a 500,000-circulation upscale quarterly acquired last July from Pace Communications.

"We are appealing to stylish, sophisticated brides who want a strong fashion point of view," explains Peggy Kennedy, *Elegant Bride* editor in chief. The summer 2004 issue, she adds, will have a clean, uncluttered look, with the checklists traditionally found in bridal magazines appearing on *EB's* Web site.



"We anticipate in 2004 that the Web will become our largest source of subscriptions. Currently only direct mail is bigger." CORDAY

more sober approach to the Web.

In 2002, Internet-based subscription volume was just 7 percent of total new sales, with half coming from publishers' Web sites and the other from multiple-magazine sales sites, says Dan Capell, editor of *Capell's Circulation Report*. But as direct mail becomes more costly and less effective (accounting for roughly 20 percent of new sub sales) and as consumer marketers better understand how to attract subs on the Web (albeit cheaply), many publishers and analysts believe the Internet can play a vital role in building circulation.

Last year, Time Inc., in a deal with AOL, began limiting access to 14 of its magazine Web sites, including *Parenting*, *Real Simple*, *People* and *Entertainment Weekly*, to the title's subscribers, AOL subscribers and readers of recent newsstand editions. Other titles, such as *Fortune* and *Money*, adopted a variation, putting a curtain over just part of their Web

Mediaweek Magazine Monitor

WEEKLIES MARCH 8, 2004

	ISSUE DATE	CURRENT PAGES	ISSUE DATE LAST YEAR	PAGES LAST YEAR	PERCENT CHANGE	YTD PAGES	YTD LAST YEAR	PERCENT CHANGE
NEWS/BUSINESS								
BusinessWeek	8-Mar	35.20	10-Mar	41.90	-15.99%	411.41	434.00	-5.21%
The Economist	28-Feb	35.00	1-Mar	40.00	-12.50%	329.00	364.00	-9.62%
Newsweek ^E	8-Mar	23.32	10-Mar	49.21	-52.61%	342.01	347.95	-1.71%
The New Republic [Ⓞ]	8-Mar	4.66	10-Mar	3.84	21.35%	37.86	48.66	-22.19%
Time ^E	8-Mar	37.44	10-Mar	46.61	-19.67%	401.91	377.29	6.53%
U.S. News & World Report ^{+C}	8-Mar	36.20	10-Mar	24.02	50.71%	239.41	223.40	7.17%
The Weekly Standard			NO NOT REPORT			50.26	53.97	-6.87%
Category Total		171.82		205.58	-16.42%	1,811.86	1,849.27	-2.02%

	ISSUE DATE	CURRENT PAGES	ISSUE DATE LAST YEAR	PAGES LAST YEAR	PERCENT CHANGE	YTD PAGES	YTD LAST YEAR	PERCENT CHANGE
SPORTS/ENTERTAINMENT/LEISURE								
AutoWeek	8-Mar	25.40	10-Mar	21.95	15.72%	188.67	216.54	-12.87%
Entertainment Weekly	5-Mar	24.67	28-Feb	34.60	-28.70%	258.89	262.64	-1.43%
Golf World	5-Mar	19.83	7-Mar	22.50	-11.87%	189.25	153.65	23.17%
New York	8-Mar	59.40	10-Mar	54.20	9.59%	423.80	396.30	6.94%
People	8-Mar	56.08	10-Mar	84.86	-33.91%	536.85	629.72	-14.75%
Sporting News	8-Mar	13.42	10-Mar	11.33	18.45%	134.76	117.66	14.53%
Sports Illustrated ^Y	8-Mar	31.35	10-Mar	42.63	-26.46%	439.27	423.72	3.67%
The New Yorker	8-Mar	21.99	10-Mar	24.39	-9.84%	296.67	342.12	-13.28%
Time Out New York	3-Mar	47.94	26-Feb	66.44	-27.85%	507.57	551.39	-7.95%
TV Guide	6-Mar	43.24	8-Mar	37.16	16.36%	512.55	526.55	-2.66%
Us Weekly	8-Mar	23.67	NO ISSUE		N.A.	225.83	231.95	-2.66%
Category Total		366.99		400.06	-8.27%	3,714.11	3,852.28	-3.59%

	ISSUE DATE	CURRENT PAGES	ISSUE DATE LAST YEAR	PAGES LAST YEAR	PERCENT CHANGE	YTD PAGES	YTD LAST YEAR	PERCENT CHANGE
SUNDAY MAGAZINES								
American Profile	7-Mar	12.25	9-Mar	8.40	45.83%	97.75	86.45	13.07%
Parade	7-Mar	10.30	9-Mar	11.06	-6.87%	121.95	123.42	-1.19%
USA Weekend	7-Mar	10.08	9-Mar	11.94	-15.58%	112.28	112.73	-0.40%
Category Total		32.63		31.40	3.92%	331.98	322.60	2.91%
TOTALS		571.44		637.04	-10.30%	5,857.95	6,024.15	-2.76%

C=2004 Career Guide special; E=estimated page counts; Y=YTDs include one special; +=one more issue in 2004 than in 2003; Ⓞ=one fewer issue in 2004 than in 2003

BIWEEKLIES MARCH 8, 2004

	ISSUE DATE	CURRENT PAGES	ISSUE DATE LAST YEAR	PAGES LAST YEAR	PERCENT CHANGE	YTD PAGES	YTD LAST YEAR	PERCENT CHANGE
BUSINESS/ENTERTAINMENT								
ESPN The Magazine	1-Mar	47.99	3-Mar	47.66	0.69%	227.20	232.33	-2.23%
Forbes	1-Mar	70.50	3-Mar	74.19	-4.97%	400.90	387.13	3.54%
Fortune	8-Mar	134.88	17-Mar	82.63	63.23%	502.85	485.93	3.48%
National Review	22-Mar	20.75	24-Mar	17.08	21.46%	90.66	78.15	16.00%
Rolling Stone	4-Mar	38.75	6-Mar	58.99	-34.31%	154.43	167.76	-7.95%
CATEGORY TOTAL		312.87		280.55	11.52%	1,376.04	1,351.40	1.82%

CHARTS COMPILED BY A MEE DEEKEN

"Visually, it's very pretty," says Lauren Kleyweg, OMD/USA senior print buyer. "It's a little high-end for reality, but maybe it's something to aspire to."

With *Elegant Bride*, Fairchild increasingly appears to be positioning itself as a parallel (high-end) universe to sister company Condé Nast. The quarterly will be an upscale answer to CN's Bridal Group, which includes the more-mass bimonthlies *Bride's* and *Modern Bride*. Likewise, Fairchild's *W* has always been a luxury version of *Vogue*. Young men's magazine *Details* competes with Condé Nast's older men's

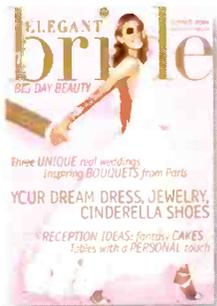
monthly *GQ*. And in September, *Details* will spin off *Vitals*, a 150,000-circ niche quarterly that will rival CN's new men's shopping bimonthly, the 300,000-circ *Cargo*.

And while *Elegant Bride* will compete with the Bridal Group for higher-end luxury advertisers, there is some overlap: 56 out of the title's 155 ad

The Fairchild quarterly will target brides with big budgets.

pages are exclusive to the magazine for first quarter, including Gracious Home and BCGB.

Elegant Bride publisher Andy Amill views it differently. "We are not going after *Bride's* or *Modern Bride*," he says. "We are about exploiting another marketplace, one that has not been served by other magazines." —LG



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mr. television

BY MARC BERMAN



The Talk of Daytime

HOW DO YOU LIKE THAT OPRAH? AFTER 18 YEARS (17 AS THE TOP-RATED SYNDICATED talk show), countless accolades, a magazine with her own name on it and a commitment to host her talker through at least 2008, the doyenne of daytime TV's current ratings are sky-high...the best they've

been in years. Everybody loves her. But I'm not so sure about her TV son, *Dr. Phil*.

Ratings-wise, Dr. Phil, who made a name for himself on *Oprah*, came roaring out of the gate in fall 2002 as the highest-rated new first-run talk show since Ms. Winfrey's debut in 1986. This season, the story is even more positive, with double-digit, across-the-board ratings gains.

It's the man behind the numbers, Phil McGraw, that I have a problem with. As good as he is—and he is damn fine at telling guests to shape up, ship out and get their acts together—I am concerned about his compassion. He has none. Oprah is our friend; Dr. Phil is our parent. We confide in Oprah; we listen to Dr. Phil. Oprah makes us laugh; Dr. Phil comes across as the guy who hands out the Kleenex.

Do we want to spend 18 years, or even four or five, with the man who aggressively tells us what to do? When we go into therapy—and who isn't these days—isn't that supposed to be a temporary situation?

At the Summer 2002 Television Critics Association gathering in Pasadena, just prior to *Dr. Phil's* premiere, I came back to my hotel room one night to find an autographed copy of McGraw's latest book. "I look forward to meeting you," said the soon-to-be talk-show host via a hand-written note apparently written to every member of the press. When I tried to exercise that option just a few

months after the debut of his runaway hit, *Dr. Phil's* publicist wondered if he would be on the cover of *Mediaweek*. Since I could provide no guarantees (watching TV doesn't give you power over the editor), he wouldn't do the interview. So much for that.

I also heard rumors that Dr. Phil was not at all happy when he lost the Emmy last year as Outstanding Daytime Talk Show host to Wayne Brady. Poor thing.

Success on television, particularly as a talk-show host, is about humility. It's about conditioning your audience to believe you're a real person—you care about even the little things. Although Dr. Phil's success on the small screen can't be denied, his long-term tenure can certainly be questioned. Unless he changes his tune and starts to relate to the audience, the not-so-good doctor might find himself writing more books sooner than he thinks.

By way of comparison, take a look at Ellen DeGeneres—who's about as real and natural as anyone you'll find on TV. Although I foolishly thought she would fall flat on her face in daytime after she flopped in her 2001-02

comeback sitcom on CBS, everyone—and I mean everyone—is talking about how good she is as a talk-show host. And ratings for the freshman Warner Bros. variety/talker are growing by leaps and bounds, thanks to word of mouth and upgraded clearances. As fast as these new first-run hours come and go, *Ellen* the talk show proves that the right talent and production team can come up with a successful match. And if you're still not convinced, count up the 12 Daytime Emmy nominations she just got last week—I'll bet she beats Dr. Phil this year.

As good as *Ellen* is, Twentieth Television unfortunately chose the wrong person when it gave Ryan Seacrest his own hour, *On Air with Ryan Seacrest*. After having a heated conversation at the recent NATPE convention with a Twentieth sales executive about the show (he actually accused me of trying to kill it), I have made a conscious effort to tune in. As ambitious a show as this is (the frantic pace alone left me feeling ready to toss my cookies), Seacrest comes across as shallow and egotistical. The success of one show does not necessarily lead to another and the initial lack

of tune-in despite an aggressive promotional campaign (not to mention the *American Idol* platform) tells me no one is really interested in Seacrest outside of *Idol*.

Although I might be biased after hearing Seacrest's smarmy (and foul-mouthed) acceptance speech for *American Idol* at the Television Critics Association Awards last summer, I truly don't think he belongs in daytime. We can stomach him on *Idol* because he is *not* the star. We can't watch him on his talk show because he *is* the star.

As for the accusation that I'm trying to kill his show, someone needs to call my bank and tell them how powerful I really am. My savings account apparently doesn't know it yet.

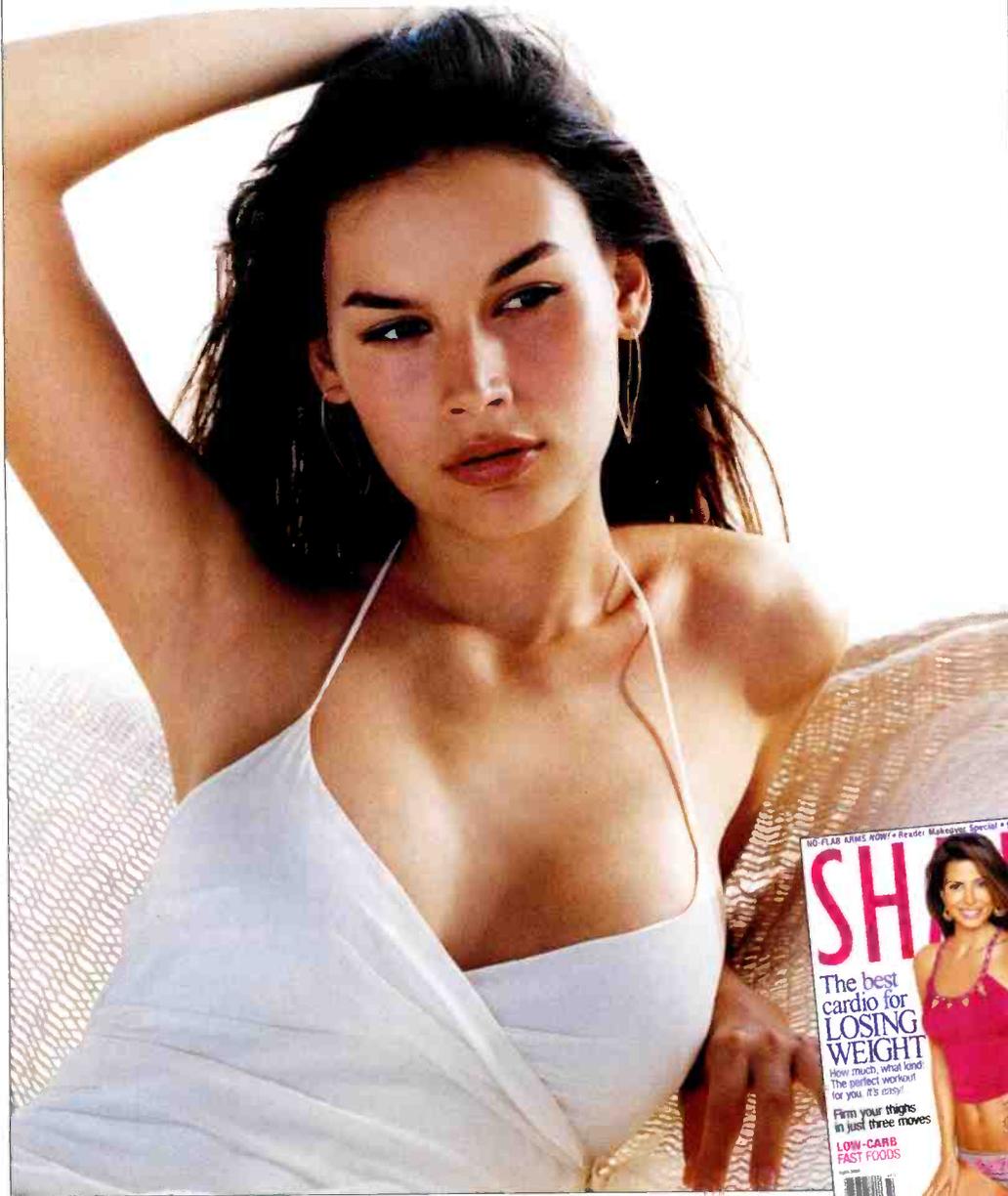
By way of comparison to Dr. Phil, take a look at Ellen DeGeneres, who's about as real and as natural as anyone you'll find on TV.

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Sources: ABC Pink Sheet Dec. 1998 - Dec. 2003; PIB CY 2002 - 2003



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ADWEEK top 10 magazines 2004

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2	Lucky.
3	ESPN
4	MensHealth
5	SHAPE
6	VANITY FAIR
7	CookingLight
8	THE NEW YORKER
9	InStyle
10	O

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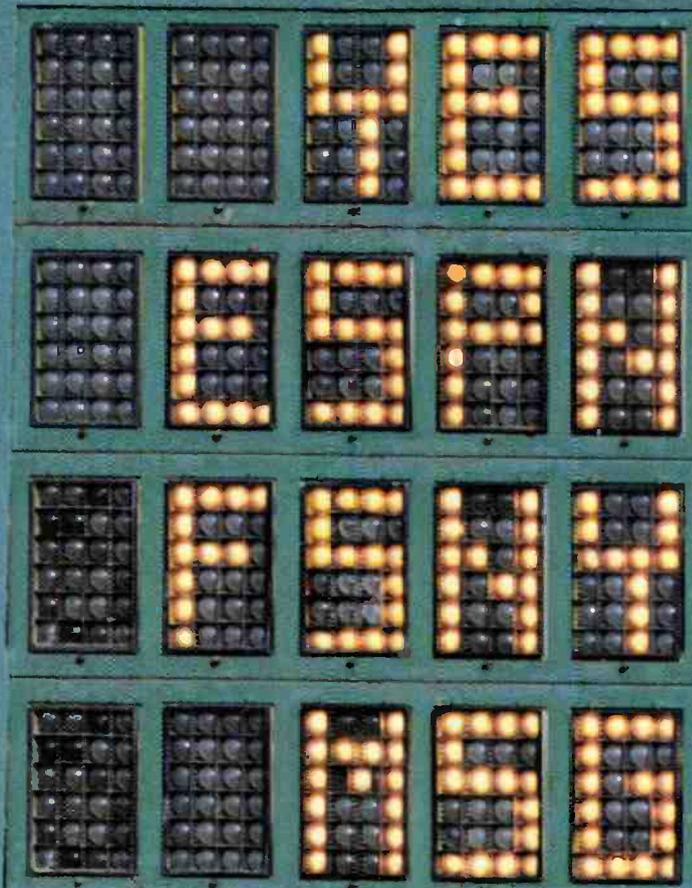
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