MEDIAWEEK

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LAURA K JONES, ASSITANT MGR S3DG
WALDENBOOKS
42 MOUNT PLEASANT AVE
WHARTON NJ 07885-2120 106
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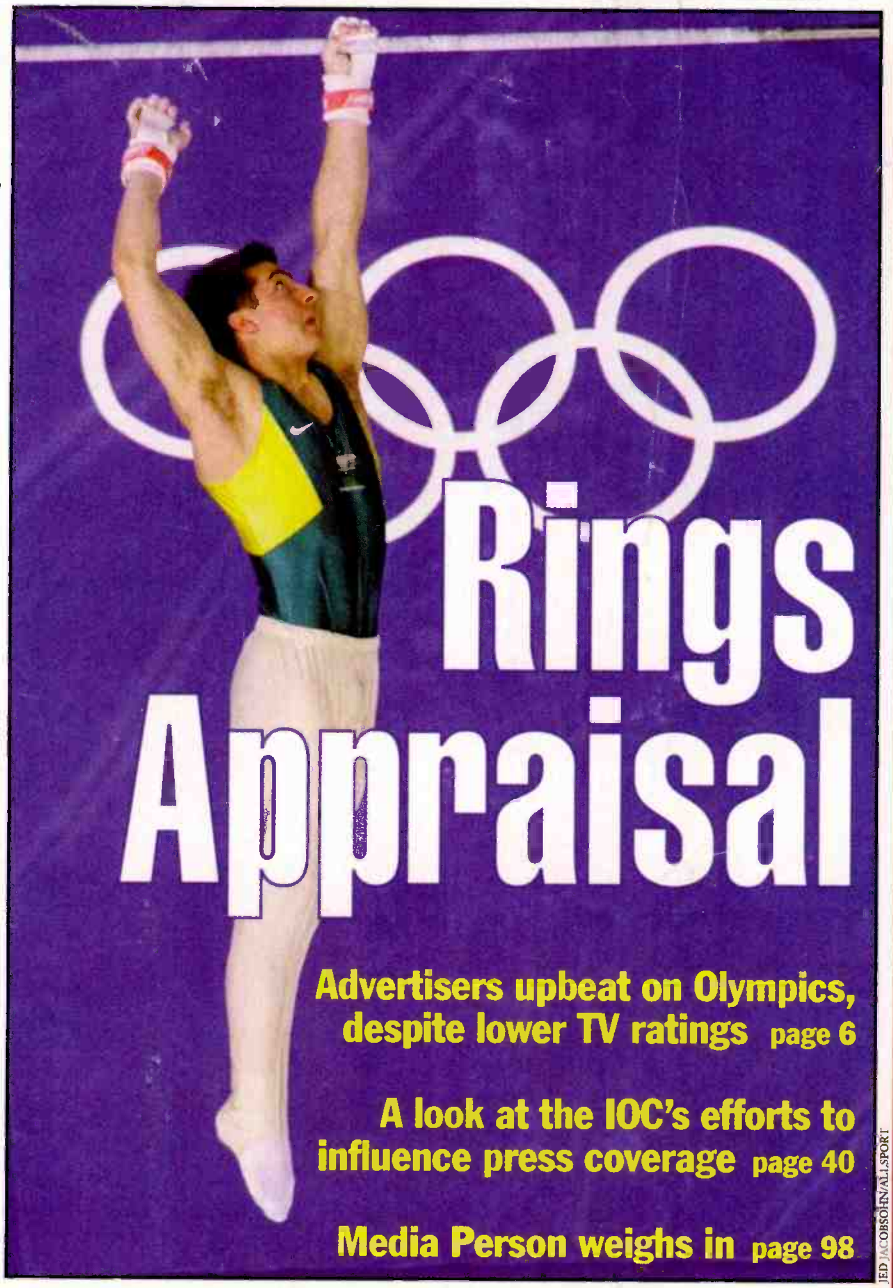

Rings Appraisal

Advertisers upbeat on Olympics, despite lower TV ratings page 6

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Media Person weighs in page 98

JED JACOBSOHN/ALLSPORT

MARKET INDICATORS

National TV: Slow
NBC's late push for Olympics ad dollars drained some advertisers' scatter budgets for fourth quarter. Advertisers who over-bought in the upfront may exercise some cancellation options in first quarter.

Net Cable: Mixed
Buyers made a fourth-quarter push before departing to ringside seats at Olympics. But some agencies bought beyond clients' budgets during the upfront and could pull out next year.

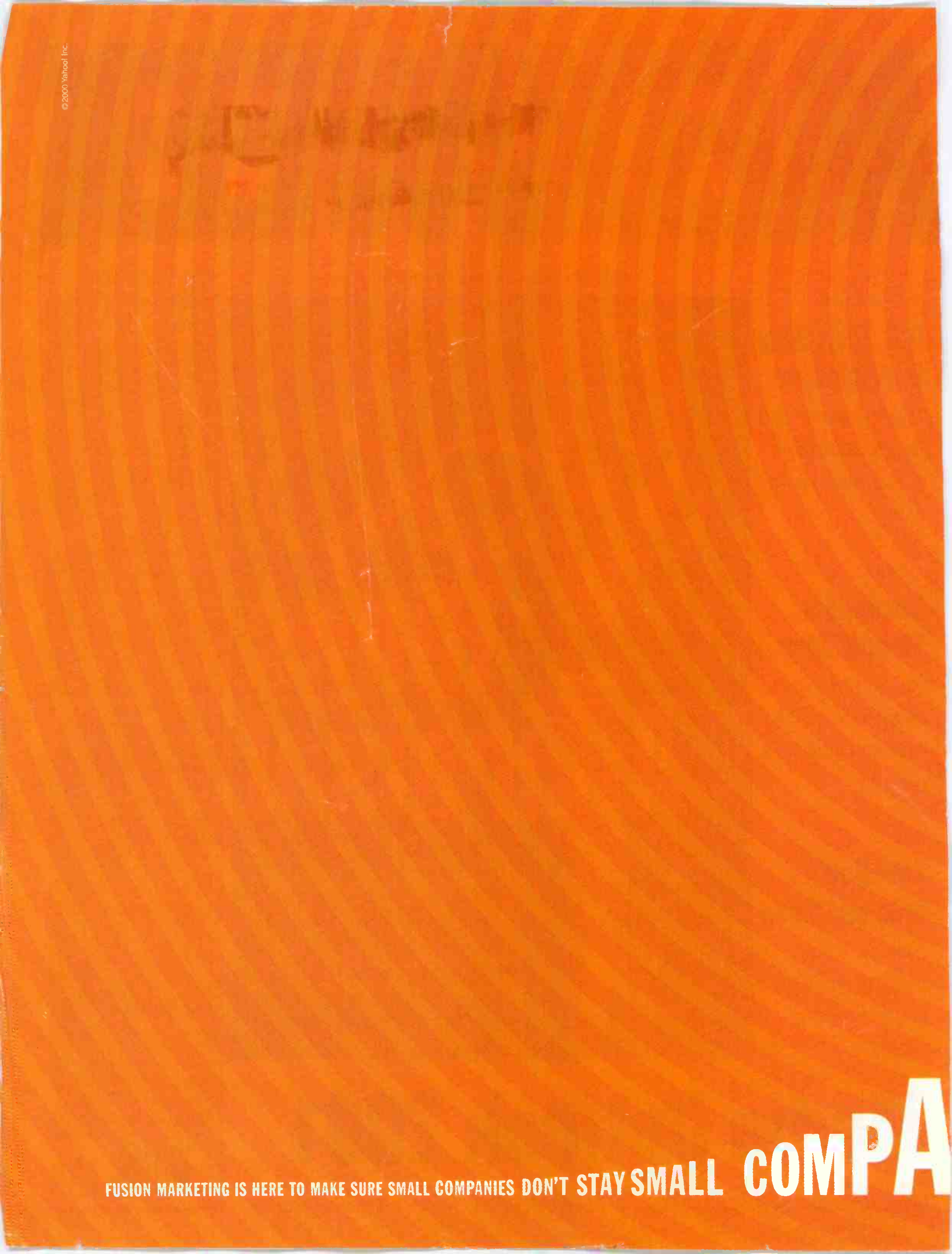
Spot TV: Busy
On top of heavy politicals, telecoms have squeezed inventory in Philadelphia, Dallas and D.C. New York is tight.

Radio: Slow
Inventory is available in big markets. Business is expected to pick up after Olympics and for November, when tune-in ads kick in for the TV sweeps.

Magazines: Wired
Dot-coms may be going the way of all flesh, but publishers continue to see across-the-board advances in all things Web and wireless.

Media Outlook 2001

Our forecast of ad spending in 10 categories **BEGINS AFTER PAGE 50**


FUSION MARKETING IS HERE TO MAKE SURE SMALL COMPANIES DON'T STAY SMALL COMPA

Laura K. Jones

AT DEADLINE

Jones Formally Takes *Post* Publisher Slot

The Washington Post handed associate publisher Boisfeuillet Jones Jr. the title of publisher/CEO, making him the first person outside the Graham family to run the paper in more than 30 years. Donald Graham, chairman of the Washington Post Co., turned over day-to-day operations of the flagship *Post* to Jones last January to focus on the company's other interests, including *Newsweek*, TV stations and Web ventures.

General Media Kills Spinoff Title

Mind & Muscle Power, a *Penthouse* spinoff published by General Media, folded last week. The fitness magazine, a brainchild of Bob Guccione, was polybagged with 1 million subscriber copies of *Penthouse* last November and January and was on selected newsstands. In February, it launched as a stand-alone monthly. Executives at General Media were not available for comment.

Dr. Laura Takes Early Hiatus

Production on Paramount Domestic Television's controversial talk show, *Dr. Laura*, will be halted today through Sept. 27 in order to tweak the show's format. A company statement said the break was "typical of many five-day-a-week programs in production." However, Paramount executives privately admit the show, in its third week, needs to be more entertaining.

CanWest Sets off Fireworks TV

Canadian-based media company CanWest Entertainment will announce today the formation of Fireworks Television USA, which will be based in Los Angeles. Robb Dalton was named president. Fireworks this fall is launching two new syndicated series: *Andromeda*, starring Kevin Sorbo (Tribune) and *Queen of Swords* (Paramount).

Broadband Homes Online More

Subscribers of two-way, high-speed Internet access spend more time on the Web and less with traditional media than those homes with only a telephone modem connection, according to a study by Arbitron and research firm Coleman. Of 3,283 respondents to the survey, broadband users spend 21 percent of their time with the Internet while telephone modem users only spend 11 percent of their time surfing.

CBS' Kids Share Grows With Nick Jr. Block

Nickelodeon's Nick Jr. block on CBS, which launched on Sept. 16, helped the broadcast network improve its Saturday-morning kids ratings. The first installment of "Nick Jr. on CBS," from 7 a.m.-noon, boosted ratings 150 percent and share 100 percent to a 2/8 among kids 2-5, tying with ABC and surpassing Kids WB's 1.7/7, according to Nielsen Media Research data. CBS' kids 2-11 share also jumped 67 percent to a 1.2/5, while share of kids 6-11 increased 50 percent to 7/3.

Cordiant, Publicis Talk Merger

Cordiant Communications Group and Publicis Group are said to be discussing a merger. Cordiant owns 50 percent of Zenith Media, the media buying service. Publicis acquired the other 50 percent of Zenith this month when it completed its acquisition of Saatchi & Saatchi. Combining Cordiant and Publicis would also place Optimedia, the media agency owned by Publicis, under the same roof.

INSIDE

Clear Channel's Lowry Mays: Web radio is part of the future

Ogilvy, Fallon Share Top ATHENA

Ogilvy & Mather and Fallon, New York, were cowinners of this year's ATHENA Grand Prize, splitting a $100,000 cash award. The ATHENAs (Award To Honor Excellence in Newspaper Advertising) are sponsored annually by the Newspaper Association of America and were handed out Sept. 21. Ogilvy was singled out for its 32-page insert for IBM; Fallon for a U. S. Tennis Association ad featuring Andre Agassi.

Addenda: Talks between **Bertelsmann**, parent company of Gruner+Jahr USA Publishing, and **Reader's Digest Association** over combining the companies' database operations are now on ice...**Richard D. Gottlieb** plans to step down in January as CEO of newspaper publisher Lee Enterprises, retaining his chairman title. Lee president/COO Mary E. Junck will take over as CEO...**MediaCom** was awarded the U.S. Postal Service's media and planning business. The performance-based contract is for one year, with four one-year options...Twentieth Television has renewed the weekly off-net run of ***The X-Files*** 135 markets covering 80 percent of the country, in deals that cover 2001-2003...***Fortune*** will raise its circulation rate base to 830,000 from 810,000.

Clarification: A Special Report feature on CNBC's Chris Matthews in the Sept. 18 issue should have noted that Fox News Channel's *O'Reilly Report* has periodically beaten *Hardball With Chris Matthews* in the ratings this year. However, because the two shows do not always run at the same time, and due to several preemptions in recent months, it is impossible to make a head-to-head ratings comparison.

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MEDIA WIRE

Kennard: FCC Will Act On AOL–TW in 30 Days

Although the Federal Communications Commission last week said it had not made any recommendations to approve the AOL-Time Warner merger, Chairman William Kennard said Friday, during a visit to India, the agency would make a decision in less than 30 days.

Various players in the transaction including Time Warner CEO Gerald Levin and AOL chairman Steve Case were discussing proposed guidelines for the merger in Washington DC earlier last week. *The Washington Post*, claiming to have obtained a draft of the review, reported Thursday that the FCC staff would recommend that the agency approve the $183 billion deal if the two companies agreed to certain open access stipulations.

"Draft reports can only be based on incomplete and speculative analysis and do not accurately reflect the decision-making process," said an FCC spokesperson, dismissing the story.

According to reports the draft order calls for AOL-Time Warner to make legal their promise to offer competing Internet companies access to their cable systems and allow them to retain full control over their relationships with customers. *—Megan Larson*

Bush is Facing a Biased Press, *E&P* Poll Reports

An *Editor & Publisher*/TIPP poll released today reports that press coverage of the presidential candidates has been anything but even in the view of a significant number of newspaper readers.

The national poll of 1,956 adults conducted two weeks ago finds that almost four out of 10 likely voters believe that the newspaper they read the most "has favored one candidate over the other in their news coverage of the campaign." Among regular newspaper readers, this figure rises to 44 percent. Among those who perceive bias, almost two-thirds feel that Al Gore has been the press' favorite son. Surprisingly, it's not just Republicans who feel this way. Conservatives have long charged that the media are "liberal-oriented," *(continued on page 8)*

Games Still Play For Advertisers

Olympics viewed as marquee event, despite lower ratings

TV SPORTS / By John Consoli

Heading into the second week of the Olympics, most advertisers are not concerned that NBC's coverage is on course to become the lowest-rated Summer Games in history. Despite NBC's failure to meet its audience guarantees during the first week of the Sydney Games, advertisers say that the Olympics are still a marquee television event that attracts a large, upscale viewership that is rarely duplicated in this era of dwindling broadcast TV viewership.

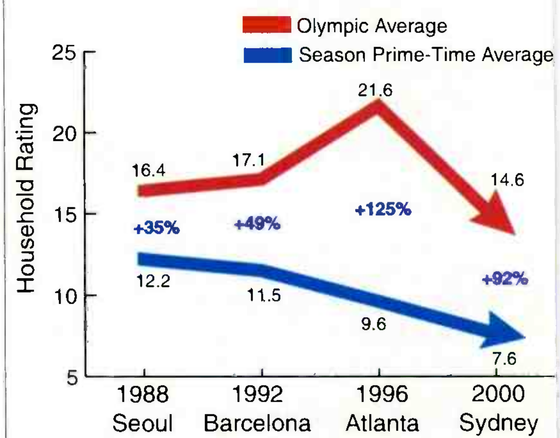
The Media Edge, which bought time on NBC's broadcasts for a number of large advertisers, including AT&T, noted that the first week of the Sydney Games outdrew other prime-time programming by a wider margin than the last two Summer Olympics outside the U.S.: Barcelona in 1992 and Seoul in 1988. Through the first seven days of prime time, the Sydney Olympics' average 14.6 rating/25 share was 92 percent higher than the average 7.6 rating earned by all prime-time shows in the season that ended in May. By contrast, Barcelona's 17.1 rating was only 49 percent better than all other prime-time programming in the 1991-92 season, while Seoul's 16.4 was only 35 percent better than the 1987-88 prime-time average *(see chart)*.

So while NBC's average rating in the first week Down Under was almost 2 points below the network's projected 16.5, advertisers say that because fewer people now watch prime-time broadcast TV, the numbers are not so bad. "The Olympics are delivering double-or-better ratings in all demos when compared to regular TV programming that was on this past season," said Bob Igiel, president of The Media Edge's broadcast unit. "And when income and education numbers on the viewers come out, they will be higher as well. My goal is to get the highest ratings number possible, but the [Olympics] is certainly performing better than regular TV programming."

"Do I wish the ratings were better? Yes," said Tim Spengler, executive vp and director of national broadcast for Initiative Media. "But there are a lot of pluses, and the Olympics are still a very powerful marketing platform for advertisers. You are also reaching a lot of hard-to-reach people—normally light TV users and upscale viewers."

The Games: TV Gold

The Olympics continue to far out-deliver other prime-time programming



Source: The Media Edge, Nielson Television Index

Tom McGovern, senior vp/director of sports for OMD USA, noted that there is still no programming on television other than the Olympics where advertisers can get a 15 rating each night for two weeks on a worldwide marketing platform.

Media buyers have generally dismissed ratings comparisons between this year's tape-delayed Games on NBC and the 1996 Summer Olympics in Atlanta, which aired live in the U.S. Comparisons to Seoul and Barcelona are more accurate because events from both Games aired primarily on tape because of the difference in time zones.

Other factors in the decline in aggregate TV viewing for the Sydney Games is the ability to get immediate results on the Internet and on 24-hour cable news channels; the disappearance of U.S.-vs.-communist country rivalries; and the weak performances in Australia of both the U.S. women's and men's gymnastics teams, which traditionally draw large audiences.

"Based on the options people have today, to garner 25 percent of all viewers to watch often-unknown athletes is a very positive experience for NBC and its advertisers," said John Rash, chief broadcast negotiator for Campbell Mithun Esty. "In an age when viewers would have to live in an isolation chamber not to know the results of the tape-delayed coverage, NBC has really achieved remarkable audience results."

Jon Mandel, co-director of MediaCom, noted that during these Olympics, NBC's broadcast and cable competitors have been airing programming "to pick off people" from the Games' audience, targeting young viewers with music and other specials rather than airing broad-based programming against the Games. Under the circumstances, NBC's ratings "are not that bad," Mandel said.

And if U.S. track star Marion Jones has some success this week in her much-hyped quest for five gold medals, NBC's ratings could rebound before the Games end Oct. 1.

Because its average first-week ratings were 11 percent below projection, NBC has offered advertisers makegoods during the rest of its Games coverage. The network has added two 30-second spots per hour to the nine minutes of national spots it was already running. Ad buyers say the additional commercials will not present a clutter problem. NBC deliberately sold fewer spots in anticipation of a possible ratings shortfall, a network representative said.

Meanwhile, NBC affiliates are also satisfied with the Games so far, particularly in markets where ratings have been higher than average. "We did a 20 rating last night in prime, and believe the best is yet to come," Roger Ogden, vp/general manager of KUSA-TV, a Gannett Co.–owned NBC affiliate in Denver, said on Friday.

NBC paid $715 million for the rights to the Sydney Games and sold $900 million worth of advertising. Deducting $100 million for production costs and an undetermined amount for the makegoods, the network should still take home a profit.

"This Olympics might not be a gold medal for NBC, but it might not be a bronze either," said Steve Sternberg, senior vp of broadcast research for TN Media. "There's a good chance to make it a silver if viewing levels improve in the second week." ■

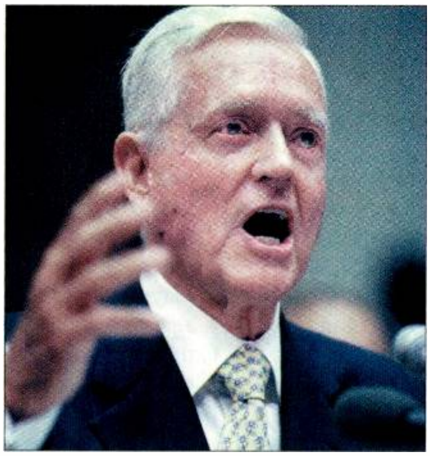
'Safe Harbor' Sets Sail

Buyers are wary of Hollings' latest effort to limit TV sex, violence

TELEVISION / By John Consoli

Despite being targeted by congressional legislation that could severely impact their programming schedules in the future, most of the broadcast networks last week opted not to get into a public debate with the government.

Several networks declined to comment on a bill by Sen. Ernest "Fritz" Hollings (D-S.C.) that was passed Sept. 20 by the Senate Commerce Committee by a 16-2 vote. The so-called "Safe Harbor" bill would give the Federal Communications Commission power to deem network television content too violent and to determine the hours in which such programming should be banned. Under the bill, violent programming would only be shown when children do not make up a significant portion of the viewing audience, or when those shows are rated so that V-chips will enable parents to block them out electronically.



SHAWN THEW/AGENCE FRANCE PRESSE

Third time lucky? Hollings' renewed push to pass his "safe harbor" bill may succeed.

Opinions are divided over its chances for success. One network official pointed out that Hollings had tried on three other occasions to pass such legislation, only to see it voted down. The exec said it was "premature" for the networks to worry about it.

Bob Okun, vp of NBC Washington, also called the legislation's future "murky at best," adding that if it were to pass the entire Congress, it "would be subject to legal challenge." Okun acknowledged that rather than combining their opposition efforts, the broadcast networks would probably lobby against the bill individually.

But if it passes, many in the media community fear the consequences. "This could be a nightmare," warned MediaCom co-director Jon Mandel, who said his Washington contacts believe the bill will pass this congressional session. "The TV industry has not woken up to how bad the situation really is. If this passes, I'm leaving the country. It will become pretty much close to a Third World nation."

An official at another network deferred comment to the National Association of Broadcasters, which offered for comment a copy of a letter that NAB president Eddie Fritts sent to John McCain, Commerce Committee chairman, who abstained from last week's vote. Fritts also opposes the bill, calling government involvement in television programming "a slippery slope." If the government can mandate when certain programs should air, Fritts said, "then it is not a stretch for government to begin determining which programs may air at all. This legislation by Sen. Hollings, while well-intentioned, is a form of censorship which we believe is contrary to the First Amendment."

Meanwhile, media buyers, who spend millions of dollars on all types of network programming, warn that a lack of aggressive opposition could allow the legislation to pass before the end of the current session of Congress. They point out that in this election year, the bill will likely receive bipartisan support, and those who want to see it passed may attach it to an appropriations bill, rather than pushing it through on its own.

Not all buyers, however, see the movement as all bad and welcome more family-oriented programming and scheduling. "I've never been in favor of government regulation, but I am in favor of compelling programming that is acceptable to all facets of society," said Bob Igiel, president of the broadcast division of The Media Edge.

"This is a clarion call that it is in the networks' best interest to aggregate, not aggravate, audience interests," said John Rash, chief broadcast negotiator for Campbell Mithun Esty. "There is enough public support on this issue, that the networks [should] come up with a solution before legislation is passed to mandate a solution." ■

Media Wire

and indeed this belief is reflected in the poll in the finding that fully half (53 percent) of all Bush supporters detect press bias, with four out of five in this group feeling it is Gore who benefits.

Fewer Gore backers perceive bias, about three in 10, and most in this group believe the press has favored Bush in their coverage, as one might expect. But a significant number of them—about one in three (37percent)—say Gore has gotten more than an even break from the press. —*Greg Mitchell, special from 'Editor & Publisher'*

Syndie's Slow Start Persists With Premiere of 'Truth'

New first-run program launches in syndication continued to endure slow performances last week, with the premiere of the Pearson Television game show *To Tell the Truth* averaging a 1.1 rating/4 share over its first four days. That is 15 percent below its lead-in and 21 percent short of its year-ago-time-period average. The Pearson strip, hosted by *Seinfeld* alum John O'Hurley, posted its lowest numbers Thursday (1.0/3).

Meanwhile, ratings didn't improve for the four strips that launched the week prior. Paramount Domestic Television's *Dr. Laura* averaged a 1.8/6 through the first four days of the week, according to Nielsen Media Research, hitting its series low Wednesday with a 1.6/5. The four-day average represented a 10 percent drop from the prior week.

Columbia TriStar Television Distribution's *Judge Hatchett* stayed flat from its debut overall (1.8/6). Another court show in its second week, King World Productions' *Curtis Court*, averaged a 1.4/5 through Thursday—down 7 percent from its debut week. And Buena Vista Television's reality-domestic-counselor series, *Housecalls*, stayed flat from week 1 with a 1.1/4. —*Daniel Frankel*

Dobbs and NBC Launch Financial Radio Show

Lou Dobbs, the venerable business journalist who's exit from CNN nearly a year ago coincided with that cable network's ratings doldrums, (*continued on page 10*)

Baseball's Challenge

Postseason broadcasts face a brushback from premieres, debates

TV SPORTS / By John Consoli

Major League Baseball, whose postseason playoff and World Series ratings have been in decline in recent years, faces a formidable test next month of competing for viewers against the networks' season premieres, three presidential debates and a vice presidential debate. Because the Summer Olympics were pushed back to September this year, most of the broadcast networks delayed the start of their fall prime-time schedules until October. That means the baseball playoffs will have to go up against season premieres of new shows, instead of later episodes as in most years.

STEVE SCHAEFER/AGENCE FRANCE PRESSE

The Braves could play to smaller national TV audiences this fall.

Ratings for the American League divisional playoffs, which begin Oct. 2, averaged a 7.4 last season, down from a 7.8 in 1998; the National League divisional games posted a 7.0 last year, down from a 7.6. The American and National League Championship Series, which begin on Oct. 10 and 11, had mixed results last year. The ALCS was down to a 9.6 (from a 10.2 in 1998), while the NLCS was up to an 11.9 (from 8.1). NBC, Fox and ESPN share coverage of the divisional playoffs, and the two broadcast nets split the LCS games. The World Series, on Fox this year, begins on Oct. 21.

Because baseball's TV audience skews older and male, the presidential debates—set for Oct. 3, 11 and 17—and the vice presidential debate on Oct. 5 are expected to have most impact on the playoff telecasts. As well, some male viewers, and many of baseball's smaller audience of women viewers, could pass up the games for some of the network premieres.

One of the biggest clashes will come on Oct. 12, when Fox will air an NLCS game and NBC will premiere its Thursday-night schedule, including *ER* and *Friends*. And on Oct. 24, NBC will premiere its *Frasier*-led Tuesday lineup opposite a World Series game on Fox.

Tom McGovern, senior vp/director of sports for OMD USA, said that while baseball might lose some audience to the debates, the LCS and World Series should post decent ratings for advertisers.

John Rash, chief broadcast negotiator at Campbell Mithun Esty, believes the programming with the most recognizable names will rise above the clutter. "Whether it's the politicians, or baseball players like Derek Jeter, or actresses like Bette Midler [whose CBS show will premiere next month] or Geena Davis [who has a new ABC show], the most visible stars will draw the audience," Rash said.

Major League Baseball officials could not be reached for comment. ■

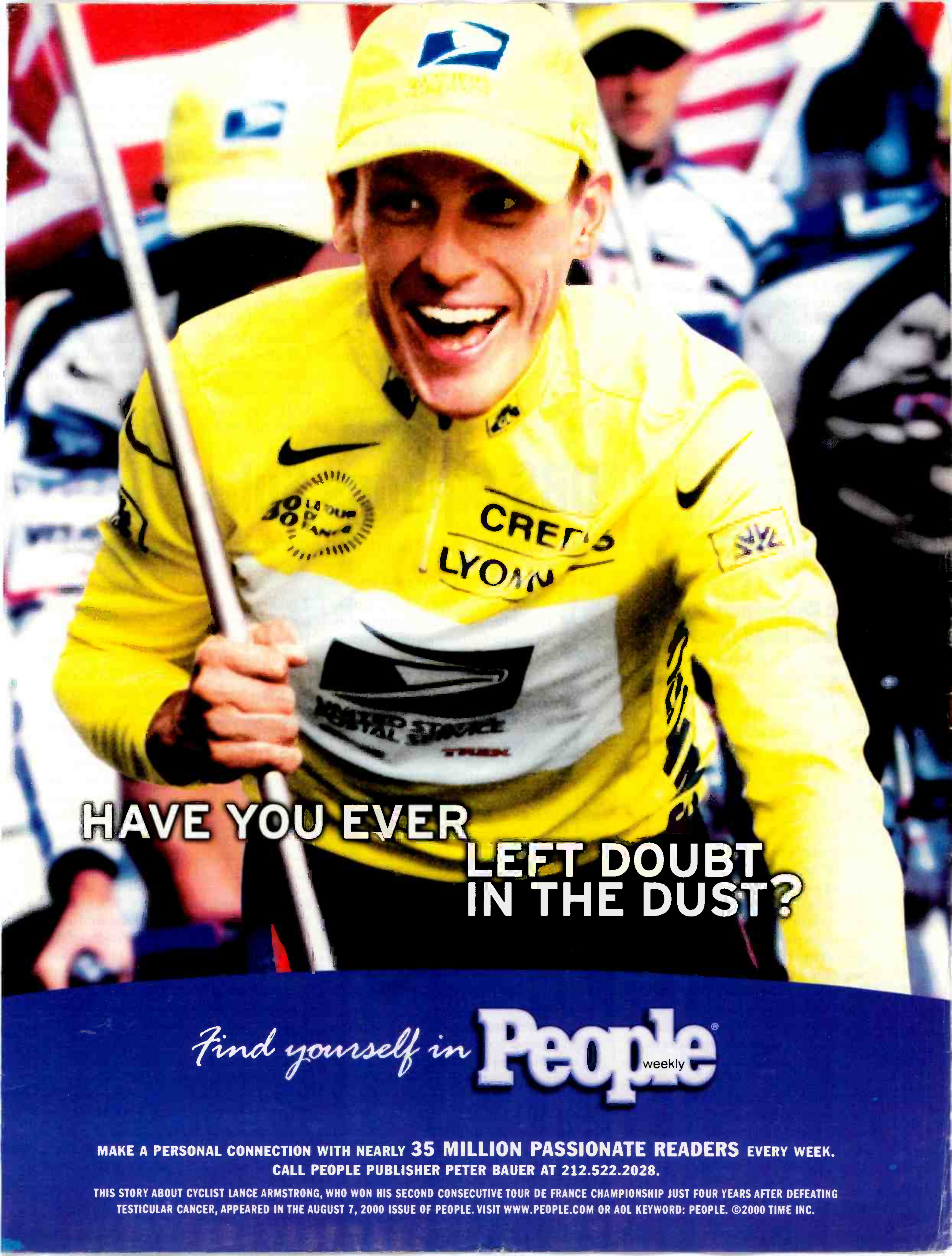
Can't Beat Web? Join It

Radio excutives embrace the Net threat, at high cost and low return

RADIO / By Katy Bachman

There was barely a live microphone in sight at this year's National Association of Broadcasters' Radio Show in San Francisco last week. Where personalities such as The Fabulous Sports Babe once sat, there was instead a display for a fully automated radio station that can grind out today's top hits with little human intervention. Inside, Internet vendors hawked streaming and ad-insertion technology.

Though stock prices have dropped recently, radio executives said the slides are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THIS STORY ABOUT CYCLIST LANCE ARMSTRONG, WHO WON HIS SECOND CONSECUTIVE TOUR DE FRANCE CHAMPIONSHIP JUST FOUR YEARS AFTER DEFEATING TESTICULAR CANCER, APPEARED IN THE AUGUST 7, 2000 ISSUE OF PEOPLE. VISIT WWW.PEOPLE.COM OR AOL KEYWORD: PEOPLE. ©2000 TIME INC.

MEDIA WIRE

today, Sept. 25, launched *The Lou Dobbs/NBC Financial Report*, syndicated by United Stations Radio Networks on more than 575 stations.

To kick-off his media return, Dobbs last week visited the National Association of Broadcasters radio conference in San Francisco. Even though Dobbs' format is short (three 60-second features aired three times daily), Dobbs, who started his career at KBLU-AM in Yuma, Ariz., said radio was a good way to get back to calling the shots in the stock market and other financial news. "Would I like the entire day? Of course. Radio has always been about brevity and voice and it'll take a week or two to find the right voice," Dobbs said.

Does all this signal a return to TV for Dobbs? It's only a matter of time, confirm radio execs who requested anonymity. For USRN and NBC, partners in MSNBC and CNBC, Dobbs seems like a long-term investment. *—Katy Bachman*

Study: Newspapers Still Top All Media in Ad Revenue

Newspapers are in no immediate danger of losing their top-dog status in terms of advertising spending across all media, and look to comfortably lead TV, magazines and online for years ahead, according to a leading forecaster.

Next year, daily and weekly newspapers are expected to reap $60 billion in advertising, beating out television's combined $56.7 billion, consumer magazines' $13.3 billion and the Internet's $11.2 billion, Veronis Suhler's latest Forecast.

While spending on other media—including online, TV, radio, magazines and outdoor—is expected to grow at a faster clip than newspapers in the coming years, ink on paper will still get the biggest share of ad dollars. By 2004, newspapers are expected to be raking in $71.5 billion in advertising, compared to TV's $69.2 billion, consumer magazines' $16.4 billion and online's $24.4 billion.

"Each of the categories continues to grow, but they're still dominated by newspapers," said Veronis Suhler managing director Kevin Lavalla. As for those who see the Internet as a real threat to newspapers in the short term? "They're dreaming," Lavalla said. *—Tony Case*

due mostly to a drop-off in dot-com advertising this year. They are also keeping a watchful eye on the threat of satellite radio and Internet-only radio stations, which hope to usurp radio's audience and ad dollars.

The going belief, as far as Internet radio goes, is it's better to join them than beat them. More than 4,200 channels stream audio on the Web, up from 2,615 a year ago, according to Internet consultant BRS Media.

"We have a huge Internet business embedded in our own company," said Lowry Mays, chairman/CEO of radio giant Clear Channel Communications, which has pursued a strategy of creating original-content Web stations.

Smaller groups are pooling their efforts. Emmis Communications has launched an industry-wide Web consortium with Bonneville International, Entercom Communications, Jefferson Pilot and Corus Entertainment. Representing 150 radio stations, the separate companies have invested more than $6 million to share technology, content and marketing. "For the first time, independent radio companies have gotten together and written checks for a common purpose," said Emmis CEO Jeff Smulyan, chairman of the Local Media Internet Venture.

"This isn't about protecting value, it's about creating new value and monetizing it," said LMIV CEO Jack Swarbrick, a partner in law firm Baker & Daniels, which consulted on the project. That said, none of these ventures is producing any sort of revenue stream. Smulyan doesn't expect LMIV to break even for at least three years. "It's unchartered waters," he said. ■

DBS Siphons Subs

Video customers switch to satellite; cable retaining new media users

SATELLITE TV / By Megan Larson

Bolstered by carriage of local signals, Direct Broadcast Satellite operators are eating further into cable's video-subscriber growth, according to a study released last week by the Boston-based Yankee Group consultancy.

"Eighty percent of households have some sort of multichannel video and much of that growth was done on the shoulders of DBS," said Mike Goodman, research analyst for the Yankee Group, speaking at the SkyForum conference in New York last week. "Availability of local stations to [satellite operators] has negated cable's [subscriber] advantage," said Goodman, adding that of those DBS subscribers who receive a local package, only 8 percent still retain a cable subscription.

Projected Growth of Multichannel Video Homes, 2000-2005

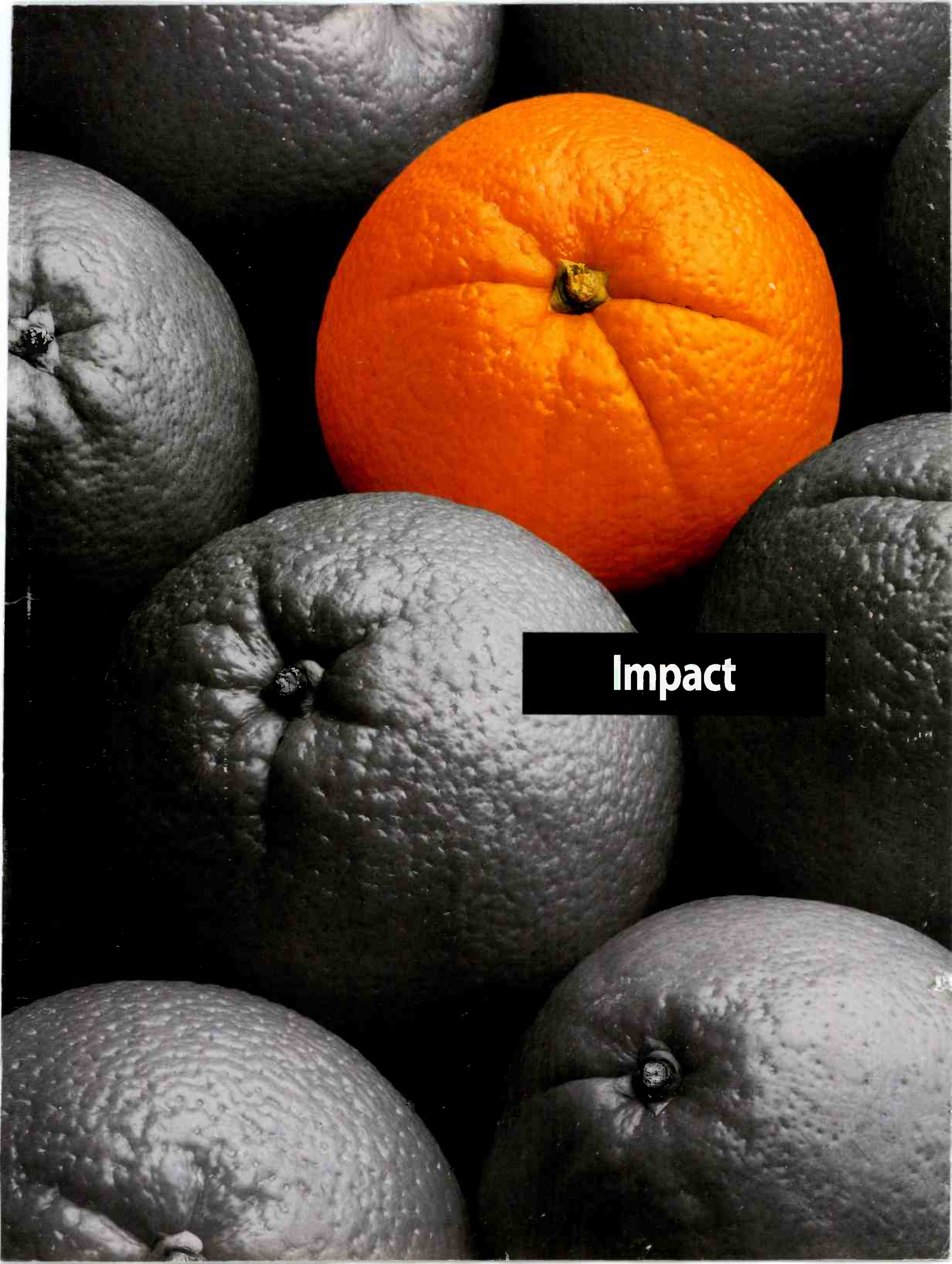
	DBS Subscribers (in millions)	Cable Subscribers (mil.)
2000	14.5	68.3
2001	17.3	68.8
2002	19.9	69.3
2003	21.9	69.7
2004	23.6	69.8
2005	25.0	69.9

Source: The Yankee Group

As for new media services such as high-speed Internet access, Veronis Suhler, in its recently released annual Communications Industry Forecast, concludes that while satellite has indeed lured some traditional video viewers from cable television, broadband offerings will help cable systems retain the lion's share of their customer base. Goodman added that cable will grow about 2 million homes over the next five years, but its share of the multichannel video market will decline from 69 percent to approximately 66 percent *(see chart)*.

Cable "is growing through ancillary services, and while video is its foundation and critical for the outgrowth of these services, it is not a growth area in itself."

DBS, however, will soon be competitive in the broadband arena. StarBand, a partner of EchoStar Communications, will unveil a high-speed Internet service late 4th quarter, Goodman said. And while local-into-local is boosting business, DBS providers don't want to carry every station in a market. The Satellite Broadcasting and Communications Association, DirecTV and EchoStar filed suit in the Federal District Court of Virginia last week against the U.S. government to strike down must-carry rules. The Satellite Home Viewer Improvement Act mandates DBS operators to carry all local signals by next year, but SBCA president Chuck Hewitt warned that carriage of many stations in a large market would preclude DBS from carrying essential stations in smaller markets. ■


Impact

Stop people and they will buy. That's the basic rule of effective advertising. And nothing has more stopping power than a color ad on a black and white newspaper page.

Just how effective is it? A color ad in a newspaper has more than double the recall of a black and white ad, according to recent Gallup & Robinson studies.

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newspaper national network®

Gayle Champagne-Automotive (248)593-6273

Mary Dowling-Packaged Goods and Drugs and Remedies (212)856-6329

Jack Grandcolas-High Tech (415)454-9168

Radio Networks' Growth Slows

Upfront business off a bit from '99

RADIO / By Katy Bachman

Compared to last year, when dot.com mania put an inordinate amount of pressure on network radio inventory, this year's upfront marketplace is expected to be almost mellow.

"While there are still some [dot.com] mainstays, the volume is not as large," noted Jennifer Purtan, senior vp of sales for ABC Radio Networks.

The merger between AMFM Radio Networks and Premiere Radio Networks has also slowed the pace. The reconfigured networks will not launch until RADAR 68, so most advertisers and agencies are waiting for special tabulations before making any decisions about spending their clients' dollars in 2001.

While the business has moderated, it's still healthy, as evidenced by the RADAR 66 report released by Statistical Research last week. Radio networks showed growth, with limited-inventory networks holding their own in the top spots. Westwood's CNN Max, Premiere's AM Drive and AMFM Sapphire were one, two and three. Following that trend, American Urban Radio Networks debuted its two new limited-inventory networks, Pinnacle at No. 16 and Renaissance at No. 22. Only two full-service networks continue to break into the top 10: ABC's full-service Prime network and AMFM's Diamond, ranked fourth and eighth, respectively.

Even though the upfront hasn't quite revved up, there's a lot of interest, thanks to the dot.coms. "The by-product of last year is the dot.coms did a great service for [network radio], proving radio is an incredible brand-building medium," said Purtan.

"We see a lot of interest from packaged goods, pharmaceuticals, and tune-in advertisers," said Roby Wiener, senior vp of marketing for Premiere Radio Networks.

Due to their respective corporate calendars, some advertisers, such as Procter & Gamble, Pfizer and others, had to lay in their plans anyway. But those who can afford to wait are doing so. "We're not going to rush into anything. We may not be done until November," said Reyn Leutz, senior vp and associate director of national broadcast for Ogilvy & Mather. ■

778454 • 20

2120 **ZIPPERS—REPAIR**

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A B C D E F G H I J K L M N O P Q

Midseason Traffic Jam

Following a congested fall, nets have a raft of replacements on deck

TV PROGRAMMING / By Alan James Frutkin

As the broadcast networks contend with a crowded fall, they may find that midseason proves to be equally packed. Estimates indicate that production on replacement series is up by at least 25 percent from last year. But if networks are looking to launch shows outside of the fall clutter, is more midseason product necessarily the smartest strategy?

"It's not as wide-open a playing field as it once was," said Jordan Levin, executive vice president of programming for the WB, which is readying four midseason series, including *The Oblongs*. "But midseason still presents opportunities, simply because there are still less shows being launched than in the fall."

FOX.

Fox hopes *The Tick*, starring Patrick Warburton, will continue the network's midseason successes.

Last midseason, Fox struck gold with *Malcolm in the Middle* and *Titus*. This midseason, the network may launch as many as four new series, including *The Tick*. Perhaps still reeling from last season's programming struggles, the network sees the rise in midseason product as a plus.

"We would have been very happy last year to have an extra drama or two," said David Nevins, Fox's executive vp of primetime programming. "The fact that both *Malcolm* and *Titus* succeeded showed us that if we have the goods, we have the marketing muscle to make them stick."

But exerting that muscle on behalf of four series, as opposed to two, could weaken the impact of those marketing strategies. "It's all about the heat you can generate," said Stacey Lynn Koerner, vp and associate director of broadcast research for TN Media. "And the networks may have to start making decisions about which of their shows they choose to promote."

NBC is preparing the largest amount of midseason product (approximately six series, including the female-targeted *Three Sisters)*. This may be because the network, like Fox, took considerable risks with its fall schedule. In general, the production increase for midseason—which runs from Dec. 14 to April 14—also may be a result of networks stockpiling for the impending writers' and actors' strike next year, as well as to avoid the fourth-quarter clutter of the Olympics, major league baseball and election coverage.

"A lot of networks purposely held back shows for midseason knowing they would have a better chance of survival if they were launched next year," said Laura Caraccioli, vp and director of Starcom Entertainment.

With *Survivor*'s success this summer, and *Who Wants to Be a Millionaire*'s success last summer, the rise in midseason product ultimately may point to a gradual shift toward a 52-week schedule. "We're developing constantly," said Jeff Bader, senior vp of programming, planning and scheduling for ABC, which has three midseason comedies, including one starring Denis Leary. "All the networks have gone from fall and midseason launches to basically a rolling season." And most advertisers are applauding that shift. "The best product can be developed without it having to be ready at a fixed point in the schedule," said Tim Spengler, executive vp and director of national broadcast at Initiative Media.

But the upfront market structure that broadcasters rely on to create their programming may prohibit that happening soon. "There's just not enough new money coming in to do a year of all originals," says NBC Agency president John Miller. "So the fall launch is something that will be with us for a while." ■

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NETWORK TV

CBS and producer Steven Bochco have committed to making the second-year medical drama *City of Angels*, which struggled in the ratings last year, a success this season. Although *Angels* is scheduled in the highly competitive 9 p.m. Thursday time slot against ABC's *Millionaire* and NBC's *Will & Grace* and *Just Shoot Me*, CBS devoted a significant amount of ad time to promote the sophomore series during *Survivor* episodes this summer. And Bochco said he's "been working from top to bottom to make it a better show. I didn't feel good about what we were doing with it last year." The producer said that an "inordinate amount of time was spent trying to decide what our persona would be," adding that the effort ultimately hurt the creativity of the scripts. Bochco said he has been writing *City of Angels* scripts in the morning and *NYPD Blue* scripts in the afternoon. "No matter what happens, [CBS Television president] Les Moonves is my hero because he brought us [*City of Angels*] back," Bochco said.

Survivor producer Mark Burnett said that 72-year old former Navy Seal Rudy Boesch, who was among the final three contestants on the show's initial run this summer, has become a friend and that he would like Boesch to help out on Burnett's Discovery Network reality show, *Eco Challenge*. Burnett said the format of *Survivor II*, set to premiere on CBS in January, will be the same as the original. "If it's not broke, don't fix it," Burnett said. He added that *II*'s environment–the Australian outback–will be much more dangerous because the outback is filled with snakes, crocodiles and lizards, and the weather is much more volatile.

Fall TV picks to click continue to roll in. TV Guide Channel's top 10 are: *Dark Angel* (Fox); *Titans* (NBC); *Gilmore Girls* (WB); *The Fugitive* (CBS); *Boston Public* (Fox); *Ed* (NBC); *Grosse Point* (WB); *The District* (CBS); *Freedom* (UPN); and *The Geena Davis Show* (ABC). Among the new shows Universal McCann believes will "probably be renewed" are: *Gilmore Girls* (WB); *Bette*, *Welcome to New York*, *C.S.I.* and *The District* (CBS); and *The Street* (Fox). *—John Consoli*

Marbut to Step Down

Hearst-Argyle architect and co-CEO will retire at year-end

TV STATIONS / By Katy Bachman

Bob Marbut, chairman and co-CEO of Hearst-Argyle Television and one of the station group's original architects, announced last week he will step down at the end of this year. Marbut will enter into a two-year consulting arrangement with Hearst-Argyle, and also will become a non-executive chairman of the company. Former co-CEO David Barrett will become president and CEO.

"Marbut was at the forefront of consolidation in television," noted PaineWebber analyst Lee Westerfield. "His sunset on broadcasting marks the closing of a marvelous career and contribution to broadcasting."

As co-founder of Argyle Television in August 1994, Marbut merged Argyle into Hearst to create Hearst-Argyle in 1997. While Hearst-Argyle is his most recent endeavor, Marbut spent seven years at Copley Newspapers and 20 years as president and CEO of Harte-Hanks Communications, where he was a founder of the company's core direct marketing business.

In the last three years, Marbut helmed Hearst-Argyle while it grew from a company with 15 TV stations reaching 11 percent of the TV households, to 26 stations reaching 17.5 percent of households. Under his watch, the company's revenue doubled from $387.8 million in 1997 to $792.9 million last year, making it the seventh largest TV group in terms of revenue, according to data from BIA Financial Network. So far this year, Hearst-Argyle continued to expand its TV assets, announcing deals to sell five of its seven radio stations and a swap deal with Emmis Communications.


Hearst-Argyle's Marbut met the digital challenge.

Under Marbut, Hearst-Argyle turned on the nation's first commercial digital station, KITV in Honolulu in 1997. As of September of this year, six Hearst-Argyle stations have upgraded to digital.

In the near term, Barrett will take off where Marbut, and John Conomikes, who preceded Barrett, left off. "Barrett can fill those shoes," said Westerfield. "It's a real mark of the quality of the organization to see this orderly transition." Marbut and Barrett could not be reached for comment. ■

Syndie Checks Reality

Fall 2001 development populated with new voyeurism concepts

SYNDICATION / By Daniel Frankel

As syndicators develop fall 2001 programming, new reality formats are gaining favor over the recent spate of star-driven talk strips and judge-ruled court shows.

Just like the networks, syndication is jumping on the voyeurism bandwagon, developing such shows as Twentieth Television's *Big Diet* by European voyeurism pioneer Endemol. The plot: overweight contestants compete to lose the most poundage while avoiding strategically positioned snacks.

"My feeling is [audience] erosion will continue until we develop some different types of programs," said Mark Itkin, senior vp/West Coast head of syndication and cable packaging for the William-Morris Agency and Endemol's U.S. representative.

Endemol has also licensed the reality-relationship concept *All You Need Is Love* to Stone Stanley Entertainment, which is developing it for Tribune Entertainment. The show tracks guests with "love problems." Telepictures Productions' has *E-Lim-I-Date* which is similar to *The Dating Game*, except the action takes place out-

CABLE TV

Viacom's MTV Networks last week took the country out of TNN and changed its name to TNN: The National Network to offer more youth-skewed general entertainment programming. TNN president David Hall will leave the company as the core management team moves from Nashville, Tenn., to New York. Nickelodeon/TV Land president Herb Scannell will also take on TNN and spearhead the revamp of the network. In the future, TNN will acquire broader sports and outdoor programming, off-network shows and original series and movies. Diane Robina was named general manager of the network. Also last week, the Delaware Supreme Court upheld Viacom's new programming arrangement with the Worldwide Wrestling Federation, turning back a challenge by former WWF carrier USA Networks. The WWF's highly rated *War Is Raw* will premiere on TNN today.

FX last week acquired 15 additional episodes of *Son of the Beach*, to premiere in the first quarter. The series, the first original comedy for the network, earned an average 1.46 household rating and delivered 743,000 homes during its initial 13-episode run earlier this year.

Court TV took *Confessions*, the controversial series showcasing videotaped criminal confessions, off its schedule after the show's second airing on Sept. 17. The cornerstone of the network's new fall line-up, *Confessions* was widely criticized for lacking depth and being insensitive to crime victims and their families. In light of recent government hammering of the entertainment community for violent content, CEO Henry Schleiff said he hopes that Court TV's correction of a programming "mistake" reflects positively on the industry.

The Cabletelevision Advertising Bureau last week reported that ad-supported cable contributed to 60 percent of the page views (908 million of 1.52 billion) on media Web sites in July. Among the top 10 sites in terms of unique audience were msnbc.com, weather.com, eonline.com, cnn.com., mtv.com and oxygen.com, according to data provided by Nielsen NetRatings. —*Megan Larson*

side of a studio.

In general, buyers have yet to see the latest crop of reality shows, but some expressed concern that they might be getting out of control. "Syndication has had plenty of game shows that have done well, and it's had plenty of court shows that have done well. But when you get into these kinds of reality shows [such as *Big Diet*], you walk the line a little bit in terms of what's appropriate," said Kristian Magel, vp/national broadcast for Optimedia International U.S.

The trend toward reality is just the latest "me too" concept by syndicators. However, recent favorites have not pulled big audiences. Last year, an above-1.0 national rating eluded talk strips built around stars such as Roseanne. Syndicators responded with five new court shows this season, three of which have premiered to modest ratings.

Syndication's 2001 will offer non-reality concepts. LMNO Productions, in concert with eBay, is shopping a variety-auction strip. Also in the pipeline is a fashion-makeover pilot from Telepictures starring Cher, and Columbia TriStar is developing an action hour around former *Baywatch* actress Carmen Electra. ■

Friday-Night Fight

Cartoon and Nick vie for kids prime-time TGIF audience

CABLE TV / By Megan Larson

With a mix of original series and vintage cartoons, Cartoon Network has passed several rungs on the ratings ladder this year to tie TBS Superstation for August.

A large part of that ratings success can be attributed to the creation of *Cartoon Cartoon Friday*, the network's Friday-night programming block, which has filled a void left by the defunct TGIF line-up on ABC.

Beginning with the new season on June 9, through Sept. 3, *Cartoon Cartoon Friday*, which showcases premiere episodes of original series such as *The PowerPuff Girls*, grew 12 percent to a 1.9 household rating and 25 percent to a 4.5 rating among kids 2-11 and 4.2 among kids 6-11. In prime time during August, the network's household ratings grew 11 percent over last year to a 2.0 and increased 24 percent in delivery to 1.3 million, according to Turner Entertainment (Cartoon's parent company) analysis of Nielsen data.


CARTOON NETWORK

Cartoon's *Dexter's* is inventing bigger ratings.

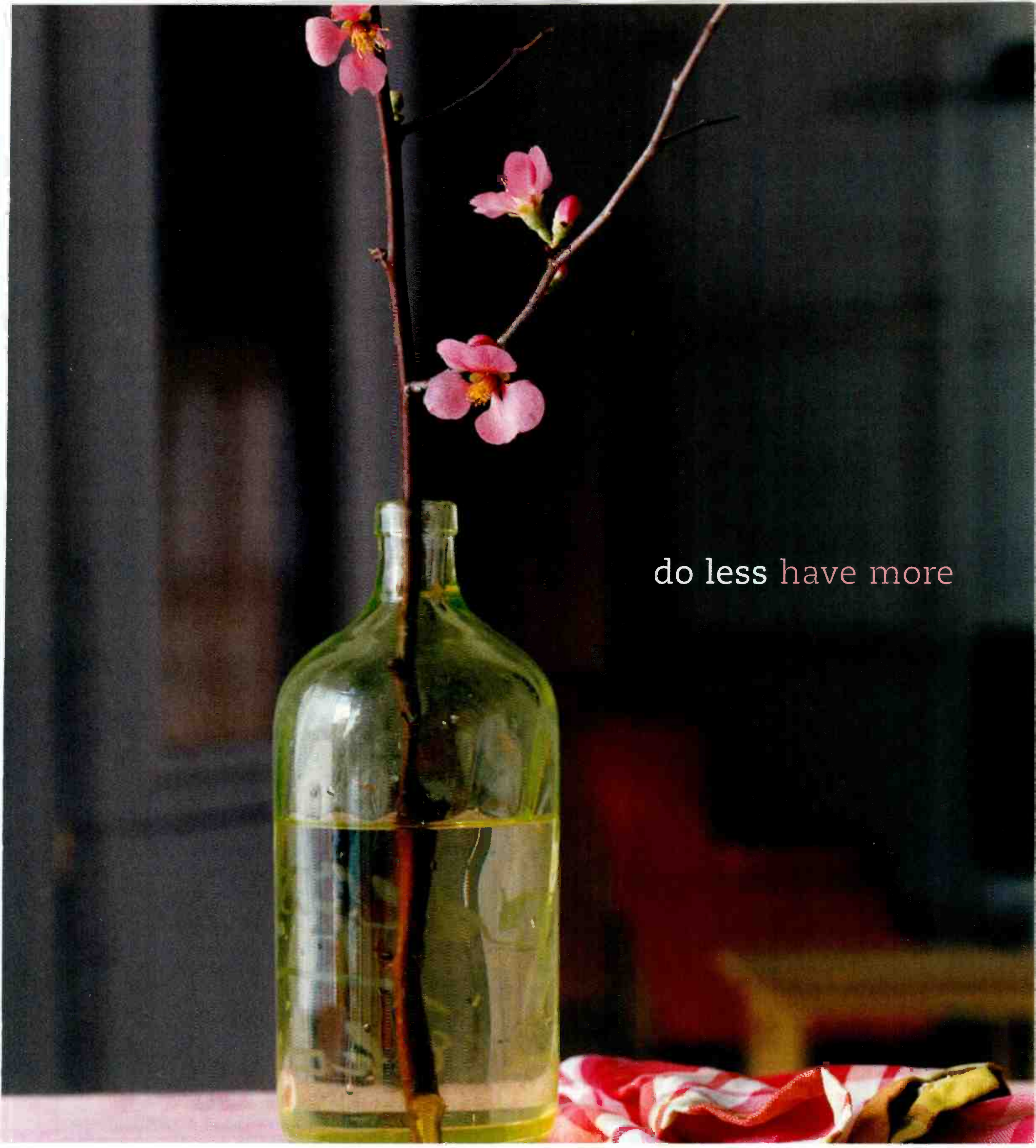
"Cartoon has tapped into fresh new talent but has also done a great job of packaging and marketing old shows," said Laura Caracciolli, vp and director of Starcom Entertainment. Toon also benefits from an increase in subscribers over the last year to 66.3 million.

"This continued ratings success is already helping us for the next upfront," said executive vp of sales Kim McQuilken. Moreover, the success of PowerPuff products—toys and films—and hefty investments in cartoonnetwork.com, has bolstered integrated sales. Original series such as *The PowerPuff Girls* and *Dexter's Laboratory* have generated great appeal on-air and off—PowerPuff alone will bring in $300 million in total revenue this year.

Still, Cartoon is up against kids programming powerhouse Nickelodeon.

"If someone emerges and competes with the unabashed leader it is good for buyers," said an agency executive who requested anonymity.

Nickelodeon, which outdelivers Toon in total households in prime time and remains the No. 1 network during total-day, extended its children's programming block until 10 p.m. on Fridays on Sept. 15. Though Toon is making strides in prime time, Nick doesn't intend to change its strategy. "I know it looks like Nick is putting a toe in the pool about kids programming at night, but the story ends with Friday," said Nickelodeon spokesman David Bittler. ■


do less have more

Local Media

TV STATIONS • NEWSPAPERS • RADIO STATIONS • OUTDOOR • MAGAZINES

DENVER RADIO STATIONS

Emmis Growing Its Cluster One by One

Emmis Communications CEO Jeff Smulyan must be on a Rocky Mountain high. A month after Emmis closed its acquisition of KXPK-FM "The Peak" in Denver from Clear Channel Communications for $36 million, the Indianapolis-based media company announced last week it plans to purchase KALC-FM, its second station in the market from Salem Communications for a hefty $98.8 million.

Salem, which concentrates on Christian radio formats, sold KALC because it needed the cash. Saying he had "mixed emotions," Salem CEO Edward Atsinger said the sale "will significantly strengthen our balance sheet without sacrificing our presence in Denver." Salem still has three Christian-formatted AMs in the market.

With KALC-FM, Emmis is getting a Hot Adult Contemporary station with a strong billing and ratings position in the market. Known as "Alice" by its listeners, the station is ranked eighth in audience share and fifth in billings, pulling in $9.8 million last year, according to BIA Financial Network. "This gives us an opportunity to grow," said Smulyan. "[KALC] fits perfectly with what we're doing [and] we don't plan much change, if at all."

However, "The Peak," with only $4.4 million in revenue and declining ratings, needed some work. On Sept. 6, Emmis dropped *The Howard Stern Show* in the mornings and flipped the format from Modern Rock to an '80s rock mix that features the likes of U2, REM, Talking Heads and INXS.

BETTIA ARCHIVES/DIGITAL PRESS PHOTOS

1980s rock hits from the likes of U2 are now getting heavy rotation at Emmis' KXPK "The Peak" in Denver.

"We didn't want to be one of many [Modern Rockers] in the market fighting for share," said Joe Schwartz, vp and general manager of both Emmis outlets. Clear Channel, the dominant group in the market with nearly 30 percent of the radio audience, has Rocker KBPI-FM, ranked 10th in the ratings, and Adult Alternative KTCL-FM, which had been gaining on The Peak.

Using the slogan "80s and beyond," The Peak's new format is actually a return to the station's original roots, when it was flying high in the ratings playing those groups and artists when they were in their heyday. Currently jockless, once The Peak is fully staffed, it will target a slightly older audience, adults 25-44, to Alice's 18-49.

Smulyan is eyeing other stations in the market. Jefferson-Pilot Communications, the second-largest group in the market, has a cluster of five stations, including top-ranked KQKS-FM. Tribune has three Denver stations, its only other radio properties outside of its heritage WGN-AM in Chicago. But so far, neither group has expressed interest in selling.

What makes this second deal so sweet is that the first deal might not have happened. Clear Channel had originally planned to sell "The Peak" to Hispanic Broadcasting, but the Department of Justice wouldn't let Clear Channel spin off the station to a company in which it held a 26 percent interest. Smulyan had bid on KXPK during the original Clear Channel/AMFM spin-a-thon at a higher price.

Including announced acquisitions, Emmis will have 24 radio stations in the nation's largest markets. Chicago is the only market in which Emmis has a standalone, WKQX-FM, making it another market where Smulyan would love to double his properties. *—Katy Bachman*

CHARLOTTE, N.C. TV STATIONS

Outbreak of 10 P.M. Local Newscasts

A third 10 p.m. local newscast will launch next month in Charlotte, N.C., when WB affiliate WFVT throws its hat into the ring. Though it may be surprising to out-of-towners that the 28th-ranked market in the country would have such a competitive 10 o'clock news market, local factors at play have brought it about.

"This is not a late-night news market," says Marni Kaufman, director of media services for Media Power Advertising in Charlotte. She cites Nielsen Media Research May sweeps information showing a drop in households using television from 41 percent to 20 among adults 25-54 demo from 10:30 p.m. to 11:30 p.m.

That's one reason WFVT decided to enter the fray, says station manager Mark Gray. "It's a fairly early-to-bed market," Gray said. He also sees an opportunity to provide a style of 10 p.m. news not offered by Fox affiliate WCCB and independent WAXN, whose news is produced by WSOC, the ABC affiliate (both are owned by Cox Broadcasting).

"From a competitive standpoint, we feel there's room for us to meet a commitment to the viewer to give them the concise news at 10 o'clock that's complete and credible, so they can go to bed early," Gray said. WFVT has contracted out with Belo-owned NBC affiliate WCNC-TV to produce its newscast.

WCNC's 11 p.m. news is considered among the best in the market, which in

We had quadruplets. Visiting hours 8-11 p.m.

The Geena Davis Show

From single girl to mother of two
in six dates flat.

Tuesdays 9:30/8:30c

Gideon's Crossing

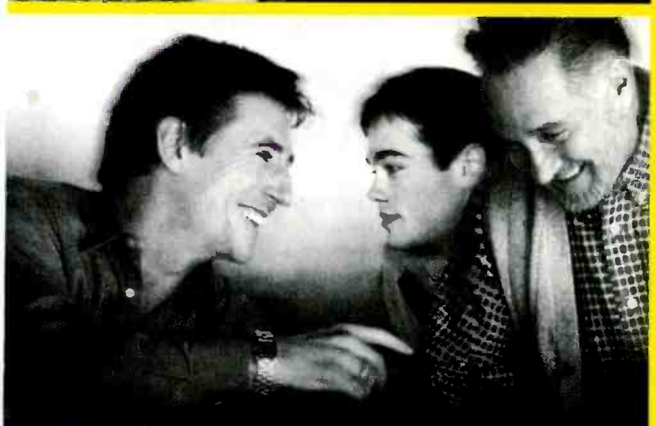
Between the experiment
and the cure.

Wednesdays 10/9c

The Trouble With Normal

Most of their problems
are in their heads.
The rest are right next door.

Fridays 8:30/7:30c



Madigan Men

Three generations.
One big gap.

Fridays 9:30/8:30c

Introducing our new fall shows.

definitely abc

abc.com

part led to a recent decision by PBS station WTVI to drop its 10 p.m. news, which had been produced by WBTV, the CBS affiliate. WTVI president Hal Bouton said he did not want to compete with a WCNC-produced newscast at 10 p.m. "We started the news five years ago because the quality of the local news here in Charlotte was basically, 'If it bleeds, it leads,'" said Bouton, adding that WCNC's 11 p.m. news "has a nice, refreshing approach."

WCCB blazed Charlotte's 10 p.m. newscast trail five years ago when it launched a 30-minute program produced by WSOC. In January, WCCB put together its own news department to produce its own 10 o'clock news program. WSOC promptly moved its 10 p.m. news production to WAXN upon buying it last spring.

In the May sweeps, WCCB posted a 2.8 rating/6 share with WAXN close behind with a 2.3/5 share in the 25-54 demo, according to WCCB. —*Gilbert Nicholson*

CHICAGO TV STATIONS

Hume Joins WBBM

WBBM-TV, CBS' owned-and-operated station in Chicago that ranks fifth in ratings and market revenue, hopes to start reversing its fortunes. One step in that direction is the hire, effective Oct. 16, of Craig Hume as news director.

Hume comes to CBS from Central Florida News 13 in Orlando, where he was gm since 1997. He cut his teeth at Tribune Broadcasting's KTLA-TV in Los Angeles, where he began as producer and news writer, moving up to manager of news operations in 1993 and later news director in 1994. Hume's experience also includes a stint as Washington correspondent and general assignment reporter for Cox-owned newspaper *The Atlanta Constitution*. —*KB*

SAN FRANCISCO NEWSPAPERS

MediaNews Adds *IJ*

William Dean Singleton's MediaNews Group last week strengthened its already considerable presence in the San Francisco Bay Area with the addition of Gannett Co.'s 40,000-circulation *Marin Independent Journal*.

No money changed hands in the deal. Instead, Gannett lets MediaNews' California Newspapers Partnership publish the 139-year-old *IJ* in exchange for a 19.49 percent ownership in CNP. Gannett previously had a 12.7 percent stake in CNP, which also encompasses Gannett's *San Bernardino Sun*; MediaNews' Alameda Newspaper Group, a chain of six dailies in the Bay Area, including the *Oakland Tribune*; and a dozen papers owned by Arkansas–based Donrey Media Group.

With the Gannett deal, Singleton continues his strategy of "clustering," snatching control of several papers in a geographic area, combining their business operations and conjoining their ad sales efforts. MediaNews now controls 22 dailies in California with a combined circ of more than 960,000.

Newspaper analyst John Morton said it made sense for Gannett to free up control of the *IJ*, considering the paper's relatively small circ and the dearth of Gannett interests in the area. —*Tony Case*

NEW YORK RADIO STATIONS

Walsh in at WOR-AM

New York Talk outlet WOR-AM has picked Ed Walsh to be the new host of its morning show. Walsh replaces John Gambling, whose contract was not renewed by the Buckley Broadcasting outlet (*Mediaweek*, Sept. 18). "The first thing listeners will notice is that we'll open up the phones more than we've done in the past," said Bob Bruno, vp/gm of WOR, who added that the subject matter will target listeners aged 45-50. "Ed discusses the news of the day and the hot stories. But the essence of the morning show isn't going to dramatically change."

Walsh, who starts Oct. 2, is no stranger to the station. Between 1987 and 1995 he served as WOR's vp of programming and news before heading off to Clear Channel's KFYI-AM in Phoenix as director of news and programming. Since 1995, he has also hosted KFYI's morning show. Walsh's show nailed a 4.7 overall share in his daypart and a 3.0 among adults 25-54, skewing stronger among the 35-64 demo with a 4.2, according to Arbitron information. —*KB*

In from Phoenix: Walsh

CHICAGO NEWSPAPERS

Kirk Shifts at *Trib*

Chicago Tribune media columnist Jim Kirk is the paper's new marketing columnist, assistant managing editor for business Greg Burns announced last week. Kirk will be stepping into the space George Lazarus used to dominate, reporting on Chicago's advertising, public relations and media scene for three decades until his death on Sept. 8. Kirk's column will run Tuesdays, Wednesdays and Fridays beginning Sept. 26. —*Mark Fitzgerald, special from* Editor & Publisher

Beam him up: Kirk will pen marketing column.

BOSTON TV STATIONS

WBZ, WSBK Shuffle

More staff shuffling as a result of the recent merger of the CBS and Paramount station groups took place last week in Boston, this time on the sales side. Kevin Fitzpatrick, local sales manager at CBS O&O WBZ-TV, was promoted to director of sales at WSBK-TV, the UPN affiliate. He replaces John Satterfield, who is becoming station manager at independently owned WLWC-TV in Providence, R.I., with which WBZ has a local marketing agreement. Replacing Fitzpatrick will be Mark Lund, who is shifting over from the local sales manager position at WSBK.

GEORGIA RADIO STATIONS

Taylor Sells to CC

Clear Channel Communications recently agreed to purchase seven stations in Macon, Ga., and two stations in nearby Cochran, from Taylor Broadcasting, for $17 million. With the deal, small operator Taylor exits the radio business. In Macon, Clear Channel's new cluster will control about 24.5 percent of the market's radio revenue, putting it second behind U.S. Broadcasting, which controls 63.3 percent, according to Duncan's American Radio. —*KB*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perhaps we're just psyched that our readers spend an incredible 1 hour and 46 minutes with every issue.
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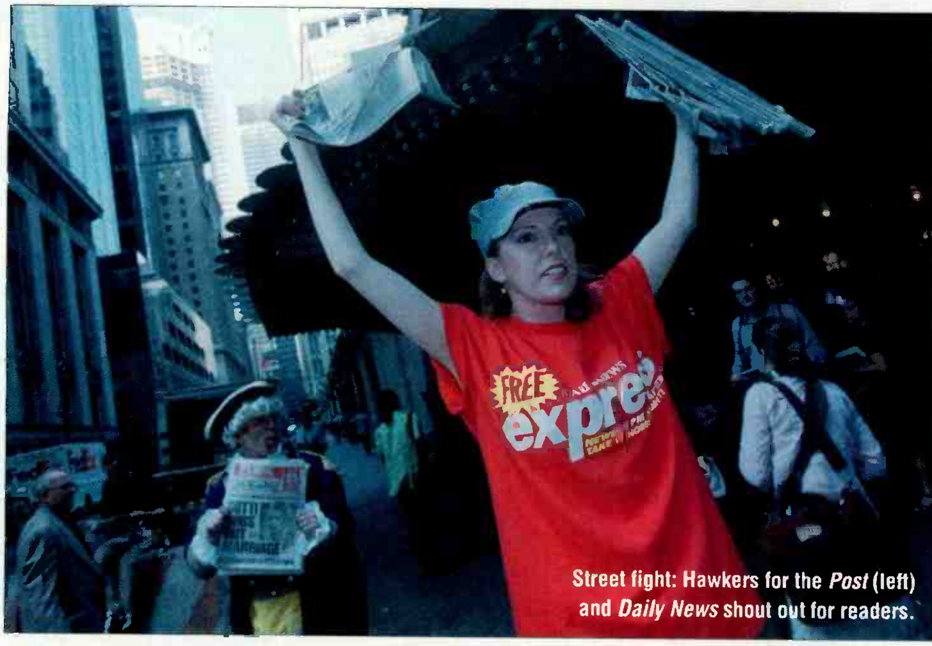
Market Profile

BY EILEEN DAVIS HUDSON



Street fight: Hawkers for the *Post* (left) and *Daily News* shout out for readers.

RICHARD B. LEVINE/NEWSCOM

New York

Thanks in large part to the expansion of the local Internet economy, headquartered in lower Manhattan's Silicon Alley, New York media outlets are having a robust year. Total ad spending in the market in the four media measured by Competitive Media Reporting rose almost 9 percent in the 12 months ended last March *(see chart on page 26)*. And spending in several hot local political races is expected to more than make up for any second-half shortfall in dot-com dollars resulting from last spring's market corrections.

The biggest news on the New York media scene these days is the latest newsstand price war between Mortimer Zuckerman's *Daily News* and Rupert Murdoch's *New York Post*. On Sept. 12, the *News* began distributing 75,000 daily copies of a free weekday-evening edition, called *Daily News Express*. To meet demand, the *News* last week bumped up its print run for the free p.m. paper to 90,000 copies. Not to be outdone, the *Post* has slashed its newsstand price in half (to 25 cents) in Manhattan, the paper's largest circulation area.

The two tabloids have been struggling with long-term circulation declines, although both were up slightly in the six months ended last March, according to the Audit Bureau of Circulations. Zuckerman recently hired a new editor for the *News*, former *New York* magazine and *Esquire* editor Edward Kosner.

The *Daily News Express* launch "has been everything we thought it would be, plus more," says Les Goodstein, *News* executive vp and associate publisher, adding that the free edition fills "a gaping hole" in the afternoons for readers and advertisers.

Long Island–based tabloid *Newsday*, acquired earlier this year by Tribune Co. as part of its purchase of Times Mirror Co., has no plans to launch an afternoon edition, says publisher Raymond Jansen. *Newsday* has expanded its business section this year, devoting more coverage to technology, Jansen notes.

Meanwhile, the *The New York Times*' weekday circulation grew 1.3 percent in the six months ended in March, to 1.14 million. The *Times* is the only paper in the U.S. with circ of greater than 500,000 to have registered gains over the last three ABC reporting periods. For advertisers, the *Times* is a national newspaper that also carries local advertising; more than 40 percent of the paper's circ comes from outside the New York area. The paper has introduced a host of technology-oriented sections and features that have scored well with advertisers.

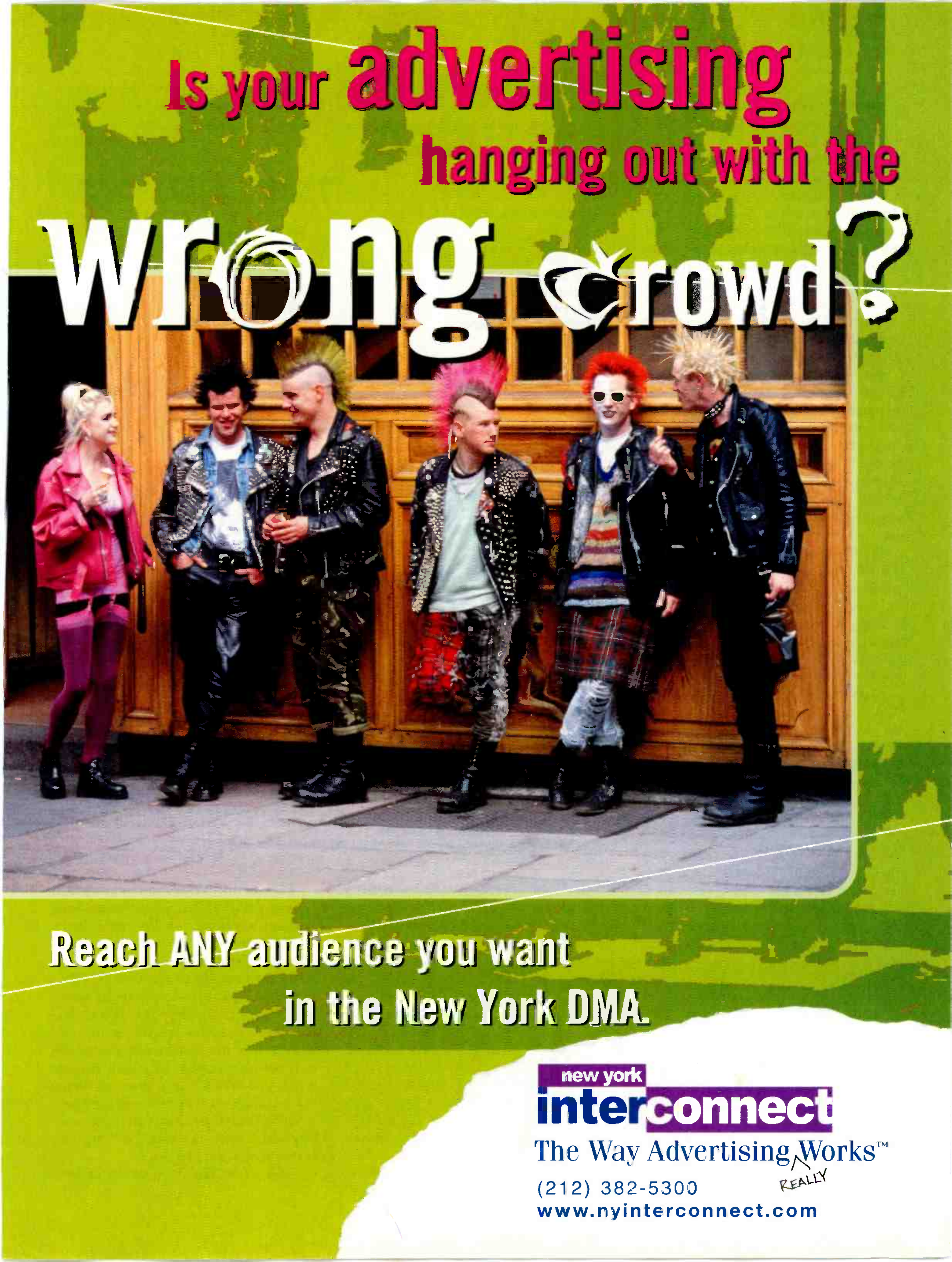
New York is also home to a host of weekly newspapers, led by *The Village Voice*. Last February, an investment group led by *Voice* executive David Schneiderman acquired the paper and six other alternative weeklies around the U.S. from Stern Publishing. Schneiderman is now CEO of Village Voice Media; Judy Miszner, previously vp/sales and marketing, moved up into his publisher's slot.

Broadcast television stations in the country's largest market (6.87 million TV households) have been building up their local news programming efforts in the battle for market share. Tribune Broadcasting WB affiliate WPIX-TV in June launched a morning news program. WPIX officials report the 6–8 a.m. weekday show has been averaging a 1.5 rating in households, beat-

Radio Listenership

STATION	FORMAT	Avg. Qtr.-Hour Share Morning Drive, 12+	Avg. Qtr.-Hour Share Evening Drive, 12+
WXRK-FM	Alternative	7.2	2.0
WINS-AM	News	6.5	2.5
WSKQ-FM	Spanish	5.2	2.5
WLTW-FM	Lite Adult Contemporary	5.0	7.0
WHTZ-FM	Contemporary Hit Radio	4.8	5.4
WCBS-AM	News	4.4	2.2
WCBS-FM	Oldies	4.1	4.1
WQHT-FM	Urban Contemporary Hit Radio	4.0	6.1
WRKS-FM	Urban Adult Contemporary	3.8	3.4
WKTU-FM	Rhythmic Contemporary Hit Radio	3.3	5.4

Source: Arbitron Spring 2000 Radio Market Report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ing the a.m. news on CBS flagship O&O WCBS-TV but running behind WNBC, WABC and Fox O&O WNYW. In the July sweeps, the WPIX a.m. news equaled WABC and WCBS in key demo ratings.

"It's not a typical morning news show," says Paul Bissonette, WPIX vp/general manager. "It has all the information that you need, but it doesn't take itself overly seriously." The newscast is modeled on the morning show on Tribune sister station KTLA-TV in Los Angeles.

The WPIX morning news features entertainment reporter Lynda Lopez, the younger sister of actress/singer Jennifer Lopez, who has developed a following in her own right in New York. Lopez had previously been a DJ on WKTU-FM in Gotham. In putting together the show's on-air talent, Bissonette says he "looked for people who we knew the market liked already, rather than bringing in all new people from all over the country and spending a year convincing New Yorkers that they knew the market."

WPIX, which after decades as the broadcast TV outlet for New York Yankees games lost those rights last year to Fox's WNYW, was able to plug that programming hole by winning the rights to the crosstown Mets, whose games had aired on Chris-Craft's WWOR-TV for 36 years. Fox has a tentative deal in place to acquire Chris-Craft.

Despite the loss of the Mets, WWOR's 10 p.m. newscast ran in a near dead-heat with WNYW's and beat WPIX's in the July sweeps (*see Nielsen chart on page 28*). WWOR's late news gets a significant ratings bounce on Thursday nights from UPN's popular *WWF Smackdown!*

The two longtime leaders in the overall TV news race are the network flagships WNBC and WABC. WNBC has been the top-billing station in the market for the past five years, says Lew Leone, the outlet's vp/sales. He projects 15-20 percent revenue growth this year, thanks to a boost in local political ads and NBC's Olympics coverage.

Scarborough Profile

Comparison of New York To the Top 50 Market Average

	Top 50 Market Average %	New York Composition %	New York Index
DEMOGRAPHICS			
Age 18-34	32	30	95
Age 35-54	40	40	100
Age 55+	28	29	105
HHI $75,000+	23	32	141
College Graduate	12	13	109
Any Postgraduate Work	10	13	124
Professional/Managerial	22	23	104
African American	13	18	145
Hispanic	12	16	137
MEDIA USAGE - AVERAGE AUDIENCES*			
Read Any Daily Newspaper	56	65	115
Read Any Sunday Newspaper	66	72	109
Total Radio Morning Drive M-F	23	26	116
Total Radio Evening Drive M-F	18	20	111
Total TV Early Evening M-F	30	28	96
Total TV Prime Time M-Sun	38	41	109
Total Cable Prime Time M-Sun	13	13	104
MEDIA USAGE - CUME AUDIENCES**			
Read Any Daily Newspaper	75	83	111
Read Any Sunday Newspaper	79	85	107
Total Radio Morning Drive M-F	80	81	101
Total Radio Evening Drive M-F	74	72	98
Total TV Early Evening M-F	71	66	94
Total TV Prime Time M-Sun	91	93	102
Total Cable Prime Time M-Sun	57	58	102
MEDIA USAGE - OTHER			
Accesses Internet/WWW	49	50	101
HOME TECHNOLOGY			
Owns a Personal Computer	60	59	98
Shops Using Online Services/Internet	18	20	110
Connected to Cable	70	78	112
Connected to Satellite/Microwave Dish	12	8	65

*Media Audiences-Average: average issue readers for newspapers; average quarter-hour listeners within a specific daypart for radio; average half-hour viewers within a specific daypart for TV and cable. **Media Audiences-Cume: 5-issue cume readers for daily newspapers; 4-issue cume readers for Sunday newspapers; cume of all listeners within a specific daypart for radio; cume of all viewers within a specific daypart for TV and cable.
Source: 1999 Scarborough Research Top 50 Market Report (August 1998–September 1999)

In the July sweeps, WNBC won the 5 p.m. news battle with an average 6.5 rating/11 share in households, topping WABC's 6.1/14. WABC continues to dominate at 6 p.m. (6.2/13 in July), although WNBC is chipping away (5.4/12).

At 11 p.m., the leaders were neck-and-neck in July, with WNBC's 7.3/13 in households edging out WABC's 7.0/12.

Ad Spending by Media/New York

all dollars are in thousands (000)

	April 1998–March 1999	April 1999–March 2000
Newspapers	$1,813,609.4	$1,901,076.9
Spot TV	$1,399,360.8	$1,527,379.3
National Spot Radio	$125,135.2	$168,729.6
Outdoor	$68,723.1	$109,277.5
Total	$3,406,828.5	$3,706,463.2

Source: Competitive Media Reporting

This month, WABC hired away Dan Forman from WNBC, where he had been assistant news director. Forman fills the WABC news director vacancy created when Bart Feder left last spring.

Forman readily admits that WNBC's acquisition last year of the popular syndicated court show *Judge Judy* (which had previously aired on WCBS) as its early news lead-in has significantly altered the early news landscape in New York. *Judy* has supplanted WABC's once dominant *Oprah* as the leading show in the market at 4 p.m.

At WABC, Forman says he plans to run more enterprise news stories and "hopefully restore this place to No. 1."

Over at WNBC, the outlet in June

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Radio Ownership

OWNER	STATIONS	Avg. Qtr.-Hour Share	Revenue (in millions)	Share of Total
Infinity Broadcasting	3 AM, 3 FM	18.1	$257.5	35.3%
Clear Channel Communications	5 FM	20.9	$165.9	22.8%
Emmis Broadcasting	3 FM	12.1	$88.2	12.1%
ABC Radio	1 AM, 1 FM	5.4	$53.1	7.3%
Spanish Broadcasting System	2 FM	6.3	$51.0	7.0%
Buckley Broadcasting	1 AM	2.7	$24.3	3.3%
Inner City Broadcasting	1 AM, 1 FM	4.1	$22.0	3.0%

Includes only stations with significant registration in Arbitron diary returns and licensed in New York or immediate area. Ratings from Arbitron, Spring 2000 book; revenue and owner information provided by BIA Financial Network.

tapped former WCBS anchor Jim Rosenfield to replace Dean Shephard as co-anchor at 5 p.m. Shephard left to join Bloomberg Television.

WNBC's 6 and 11 p.m. news programs are rebroadcast nightly on Paxson Communications' PaxNet flagship, WPXN-TV.

WCBS, which has been in a local-news ratings slump for years and trails its competitors by a wide margin, will welcome back longtime New York anchor Ernie Anastos to the station early next year after a stint on WWOR. Anastos' duties have not yet been announced. WCBS has also hired Brett Haber to join veteran sports anchor Warner Wolf at 11 p.m. Haber comes from Fox O&O WTTG-TV in Washington.

New York's Spanish-language TV stations, Univision O&O WXTV and Telemundo's WNJU, have a strong following in a market whose Hispanic population is about 16 percent, according to Scarborough Research (*see chart on page 26*). WXTV has the top-rated news in the market among Hispanic viewers. And among all viewers in the market, WXTV's *Noticias 41* beat WCBS at 6 p.m. in the July sweeps with an average 2.9/6 in households to a 2.7/6.

This month, WXTV appointed J.J. Gonzalez as managing editor. Gonzalez, who worked for WCBS for nearly 30 years, most recently held the news director slot at cable TV's Bronxnet Community Programming Corp. On Sept. 11, WXTV introduced two new anchors, Ramon Zayas and Birmania Rios, on its year-old morning newscast. The outlet has also revamped its weekend news, including the addition of new anchors Antonio Martinez, Olga Alvarez and weatherperson Betty Sermeno.

Cable television in New York gives broadcast TV and print a run for their money in the competition for advertising with penetration of 78 percent, well above the national average of 70 percent in the top 50 markets. The dominant operators are Cablevision Systems Corp. and Time Warner. Cablevision's News 12 channel is the market's largest local-cable programming entity, boasting more than 3 million subscribers on the company's systems in the Bronx; Long Island; Newark, N.J.; Westchester County; and Connecticut. Time Warner operates a similar news channel on its systems, New York 1. Cablevision also runs the New York Interconnect, which reps some 3.5 million homes.

New York radio has had a blistering year, with total ad revenue up 34.3 percent in the first six months compared to the first half of 1999, according to Miller, Kaplan, Arase & Co. Local advertising grew 30.1 percent to $326 million. Buyers say there has been a marked slowdown in August and September as dot-coms have pulled back. Still, buyers say inventory remains tight.

The market is still buzzing about long-

Nielsen Ratings/New York
Evening and Late-News Dayparts, Weekdays

Evening News

Time	Network	Station	Rating	Share
4-5 p.m.	CBS	WCBS	1.8	5
5-5:30 p.m.	NBC	WNBC	6.5	15
	ABC	WABC	6.1	14
	WB	WPIX*	3.5	8
	UPN	WWOR*	3.0	7
	CBS	WCBS	2.8	7
	Univision	WXTV	2.5	6
	Fox	WNYW*	1.6	4
	Telemundo	WNJU	1.1	3
	Pax	WPXN*	0.6	1
5:30-6 p.m.	NBC	WNBC	6.5	15
	ABC	WABC	6.1	14
	WB	WPIX*	3.5	8
	UPN	WWOR*	3.0	7
	CBS	WCBS	2.8	7
	Univision	WXTV*	2.5	6
	Fox	WNYW*	2.0	4
	Telemundo	WNJU*	1.1	3
	Pax	WPXN*	0.6	1
6-6:30 p.m.	ABC	WABC	7.0	15
	NBC	WNBC	6.3	13
	WB	WPIX*	4.9	10
	Fox	WNYW*	3.5	7
	Univision	WXTV	2.9	6
	CBS	WCBS	2.7	6
	UPN	WWOR*	2.2	5
	Pax	WPXN*	1.2	3
	Telemundo	WNJU	1.1	2

Late News

Time	Network	Station	Rating	Share
10-11 p.m.	Fox	WNYW	4.2	6
	UPN	WWOR	4.0	6
	WB	WPIX	3.3	5
11-11:30 p.m.	NBC	WNBC	7.8	14
	ABC	WABC	7.0	12
	WB	WPIX*	6.4	11
	Univision	WXTV	4.2	8
	CBS	WCBS	4.0	7
	Fox	WNYW*	3.4	6
	UPN	WWOR*	3.3	6
	Telemundo	WNJU	1.2	2
	Pax	WPXN*	0.8	2

*Non-news programming Source: Nielsen Media Research, July 2000

Industries collide. Billions change hands. New world orders emerge.

time Rock outlet WNEW-FM's radical format switch last September to FM Talk. "We've just started seeing some substantial [ratings] gains, especially with *Opie & Anthony* in afternoon drive," says Dana McClintock, a representative for WNEW owner CBS/Infinity Broadcasting.

While some advertisers have shied away from the "shock-jock"–type routines of Opie & Anthony, Colleen Kelly, senior broadcast negotiator with Western Initiative Media, says the show is a good alternative for some clients. "New York, for the No. 1 radio market in the country, was in dire need of a shake-up," says Kelly. "[WNEW's format change] has changed the way you can buy New York radio."

Sister Infinity station WXRK-FM (K-Rock), despite some recent ratings slippage for morning host Howard Stern, remains tops in the market in reaching 25-to-44-year-old men. Stern's show "had its best year ever in 1999 [in revenue] and is on track to top that this year," McClintock says.

CBS/Infinity's AM News stations, WCBS and WINS, are maintaining their strong positions, as is the company's All Sports outlet WFAN-AM, which broadcasts Mets and New York Knicks games. WFAN, the home of syndicated morning man Don Imus, is the top-billing radio station in New York, according to BIA Financial Network, which estimates the outlet's 1999 revenue at $60.8 million. (In ratings, WLTW-FM, Clear Channel Communications' powerhouse Lite Adult Contemporary, is the top overall station in New York.)

Spanish Broadcasting's WSKQ-FM ranks third overall in the market in the ratings, according to Arbitron. Among stations targeting African American listeners, Emmis Communications' lineup of Urban Contemporary Hits WQHT-FM (Hot 97), Urban Adult Contemporary WRKS-FM (Kiss-FM) and New Adult Contemporary/Smooth Jazz WQCD-FM (CD101) compete against African American–owned Inner City Broadcasting's Urban WBLS-FM.

"It's been a turnaround story for the last two years," says Kernie L. Anderson, gm for WBLS and ICB's Talk WLIB-AM. "We've stabilized. We're consistently in the top 10 in 25-54 as well as 12-plus. Three years ago, we were in the top 18."

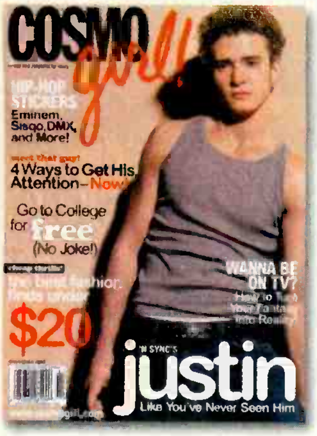
Clear Channel's relaunched WKTU-FM has successfully attracted African American listeners with its Rhythmic Contemporary Hit Radio format.

Outdoor advertising in New York is in the midst of a boom, thanks to heavy spending by the dot-coms and the continuing development of Times Square, a major venue for outdoor ads. Infinity Outdoor, Eller Media and TDI lead the market. The popularity of massive "spectaculars" in the Times Square area is increasing. At Broadway and 47th Street, Eller Media controls the space on a new 300-foot-tall tower that can support 70,000 to 75,000 square feet of signs, the biggest display space along the Great White Way. ■

Newspapers: The ABCs

	Daily Circulation	Sunday Circulation	Daily Market Penetration	Sunday Market Penetration
New York County (Manhattan): 741,400 Households				
Newsday (Long Island)	15,858	10,994	2.1%	1.5%
El Diario la Prensa	13,098	2,676	1.8%	0.4%
The New York LawJournal	7,578		1.0%	
New York Daily News	126,763	104,043	17.1%	14.0%
New York Post	99,270	62,402	13.4%	8.4%
The New York Times	208,501	230,419	28.1%	31.1%
El Vocero de Puerto Rico	11,984		1.6%	
Bronx County: 413,400 Households				
Newsday (Long Island)	3,679	8,420	0.9%	2.0%
El Diario la Prensa	7,317	2,965	1.8%	0.7%
New York Daily News	80,288	110,468	19.4%	26.7%
New York Post	20,005	19,932	4.8%	4.8%
The New York Times	14,813	22,272	3.6%	5.4%
Nassau County: 436,500 Households				
Newsday (Long Island)	227,438	260,307	52.1%	59.6%
New York Daily News	43,489	41,948	10.0%	9.6%
New York Post	21,780	23,989	5.0%	5.5%
The New York Times	52,232	81,861	12.0%	18.8%
Suffolk County: 440,800 Households				
Newsday (Long Island)	242,704	291,616	55.1%	66.2%
New York Daily News	30,279	27,902	6.9%	6.3%
New York Post	10,865	12,444	2.5%	2.8%
The New York Times	23,632	50,863	5.4%	11.5%
Queens County: 728,500 Households				
Newsday (Long Island)	73,166	80,671	10.0%	11.1%
El Diario la Prensa	12,258	4,223	1.7%	0.6%
New York Daily News	115,436	142,343	15.8%	19.5%
New York Post	41,314	41,055	5.7%	5.7%
The New York Times	51,657	78,587	7.1%	10.8
Kings County (Brooklyn): 801,100 Households				
New York Daily News	126,146	181,496	15.7%	22.7%
New York Post	57,758	47,190	7.2%	5.9%
The New York Times	47,894	68,462	6.0%	8.5%
Westchester County: 329,600 Households				
New York Daily News	30,991	30,984	9.4%	9.4%
New York Post	19,175	17,638	5.8%	5.4%
New York Times	58,436	79,913	17.7%	24.2%
The Journal News	98,719	116,407	30.0%	35.3%
Rockland County: 91,300 Households				
The Record, The Sunday Record (N.J.)	682	1,985	0.7%	2.2%
New York Daily News	5,684	6,905	6.2%	7.6%
New York Post	5,424	5,703	5.9%	6.2%
The New York Times	8,892	15,003	9.7%	16.4%
The Journal News	39,162	46,984	42.9%	51.5%
Richmond County (Staten Island): 140,800 Households				
New York Daily News	21,166	22,075	15.0%	15.7%
New York Post	14,829	11,108	10.5%	7.9%
The New York Times	7,430	12,352	5.3%	8.8%
Staten Island Advance	67,409	87,019	47.9%	61.8%

Source: Audit Bureau of Circulations



Bubble lettering now graces *CosmoGirl!*'s tweaked cover.

February, will have a "cleaner, more sophisticated look" for November, says editor in chief Atoosa Rubenstein. Art director Lisa Shapiro, formerly deputy art director at sister pub *Harper's Bazaar*, succeeded Deanna Filippo. "We've eliminated many of our old illustrations," explains Rubenstein, who wants a more crisp and clean look. "We wanted to get away from the 'cartoony' feel, to other kinds [of images] that were more realistic."

In an office across town, Iverson is also hard at work relaunching *YM*. With a new creative team in place—creative director Trey Speegle, formerly of *POZ*, and *Vanity Fair* associate art director Mimi Dutta, who begins this week as art director—the title has all but gone back to the drawing board. While some changes will appear in the December/January issue, February marks the official relaunch. "My vision is to make *YM* just as visual and compelling graphically as it is meaningful to the reader from a relationship standpoint," says Iverson. "A girl looks to *YM* for direction in leading her inner life, but I want her to look to *YM* to lead every part of her life—fashion, beauty—and be a source book for celebrity, for cute boys and relationships."

In February, the number of edit pages will increase, with a bump in fashion and beauty coverage. But already, the pending changes appear to be helping on the ad front. *YM* scored its first ads from Ford and General Motors for December/January, and Tommy Hilfiger returns to the 2.2 million-circ book in February, says *YM* publisher Laura McEwen.

Other teen titles with changes in the works include Time Inc.'s *Teen People*, which in October added three new fashion/beauty columns and will increase its fashion and beauty coverage even more in February, says *TP* managing editor Christina Ferrari. *Teen People* will also raise its rate base in February by 13.3 percent to 1.6 million.

Changes are also afoot at the 303,000-circ *Twist*, run by Bauer Publishing. The November issue, on stands this week, is

Mediaweek Magazine Monitor

Biweeklies

September 25, 2000

Trailing its 1999 by 5.74 percent, *National Review* is looking to fourth quarter to make up the loss. With an elections windfall—expected with the Oct. 23 issue, says associate publisher Scott Budd—and a 45th anniversary special issue still to come, *NR* expects pages to balance out by year end. —*LL*

	ISSUE DATE	CURRENT PAGES	ISSUE DATE LAST YEAR	PAGES LAST YEAR	PERCENT CHANGE	YTD PAGES	YTD LAST YEAR	PERCENT CHANGE
BUSINESS/ENTERTAINMENT								
Business 2.0[B/20]	10-Oct	197.50	1-Oct	163.49	20.80%	2698.05	758.61	255.66%
ESPN The Magazine	2-Oct	41.59	4-Oct	55.88	-25.57%	1,144.51	1,167.89	-2.00%
Forbes	18-Sep	167.24	20-Sep	167.50				
Forbes FYI	18-Sep	84.30	20-Sep	79.20				
Forbes[e]	18-Sep	251.54	20-Sep	246.70	1.96%	4,023.83	3,086.54	30.37%
Fortune	2-Oct	174.02	11-Oct	238.28	-26.97%	4,518.97	3,176.69	42.25%
Inc.[F]	1-Oct	87.40	1-Oct	69.30	26.12%	1,301.00	1,087.20	19.67%
National Review	9-Oct	21.83	11-Oct	26.58	-17.87%	389.09	412.79	-5.74%
Rolling Stone	28-Sep	44.64	30-Sep	67.88	-34.24%	1296.67	1379.18	-5.98%
CATEGORY TOTAL		**818.52**		**868.11**	**-5.71%**	**15372.12**	**11068.90**	**38.88%**

B=MONTHLY IN 1999; e=PUBLISHER'S ESTIMATE; F=18 ISSUES PER YEAR; 20=20 ISSUES PER YEAR

Bimonthlies

September/October 2000

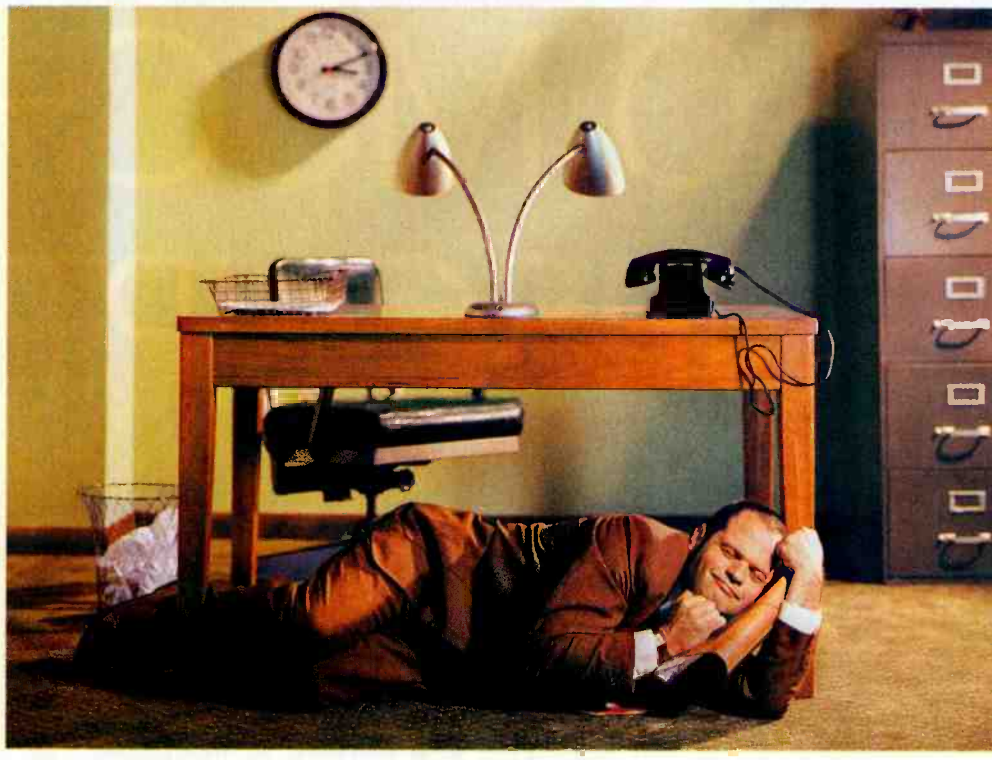
American Express Publishing's *Departures* is riding high so far this year, thanks in part to one additional issue over 1999. The separate September and October editions this year have driven pages ahead 38.89 percent to date. —*LL*

	RATE BASE (1ST HALF '00)	CIRC. (1ST HALF '00)	CURRENT PAGES	PAGES LAST YR.	% CHANGE	YEAR TO DATE	YTD LAST YEAR	% CHANGE
American Heritage[8]	310,000	319,741	35.82	40.90	-12.42%	241.55	288.64	-16.31%
American Photo	250,000	254,821	59.70	44.01	35.65%	272.15	224.93	20.99%
Audubon	450,000	466,351	68.41	84.44	-18.98%	346.55	318.56	8.79%
Bride's	None	475,013	544.39	456.69	19.20%	3,657.50	3,420.90	6.92%
Civilization	75,000	277,405	NO ISSUE		N.A.	163.34	177.9	-8.18%
Classic American Homes	500,000	510,406	71.70	58.72	22.10%	235.02	225.86	4.06%
Coastal Living	400,000	420,186	127.63	123.30	3.51%	127.63	123.30	3.51%
Country Home[8]	1,000,000	1,066,795	95.08	84.79	12.14%	591.01	521.07	13.42%
Country Journal	None Claimed	134000[x]	14.28	9.52	50.00%	80.58	74.12	8.72%
Country Living Gardener	475,000	512,059	30.38	29.03	4.65%	165.20	149.82	10.27%
Custom Classic Trucks	105,000	-	82.34	72.39	13.74%	297.18	253.16	17.39%
Departures	315,000	388,836[b]	196.31	N.A.	N.A.	876.01	630.74	38.89%
Elle Decor[7]	450,000	466,732	214.89	222.86	-3.58%	912.09	905.13	0.77%
Fortune Small Business[8]	1,000,000	1,000,000[b]	58.57	50.09	16.93%	416.05	258.76	60.79%
Garden Design[8]	425,000	444,349	49.885	67.00	-25.54%	303.82	365.96	-16.98%
Golf for Women	358,000	362,211	67.81	66.41	2.11%	367.57	350.78	4.79%
Healthy Kids	None	1554574[b]	47.33	40.00	18.33%	166.37	185.76	-10.44%
Islands[8/@@]	220,000	220,283	98.30	77.57	26.72%	504.37	398.8	26.47%
Jump[9]	400,000	431,789	30.70	39.33	-21.94%	308.41	349.60	-11.78%
Kit Car	50,000	-	20.17	21.25	-5.08%	101.16	104.71	-3.39%
Mature Outlook	650,000	699297[x]	55.36	50.31	10.04%	310.66	259.82	19.57%
Metropolitan Home	600,000	607,097	165.36	179.90	-8.08%	615.19	607.07	1.34%
Midwest Living	815,000	822,578	105.38	113.51	-7.16%	579.99	559.69	3.63%
Modern Bride	None	407,923	484.18	463.19	4.53%	2,880.24	2,765.55	4.15%
Modern Maturity	20,000,000	20,636,813	63.40	56.84	11.54%	265.44	228.50	16.17%
Mother Jones	150,000	166,688	36.17	35.99	0.50%	130.24	127.26	2.34%
Motorcycle Cruiser	55,000	-	34.08	31.97	6.60%	220.25	210.98	4.39%
Muscle Car Review	55,000	-	19.33	19.03	1.58%	103.91	111.58	-6.87%
National Geographic Traveler[8]	715,000	728,541[e]	61.69	48.98	25.95%	411.66	370.60	11.08%
Old House Journal	140,000	145,141	92.55	64.00	44.61%	340.50	263.20	29.37%
Organic Gardening	600,000	605,980	30.02	20.11	49.28%	159.65	115.49	38.24%
Petersen's Rifle Shooter	50,000	-	26.53	25.00	6.12%	96.62	99.13	-2.53%
Powder[7]	60,000	-	49.76	41.87	18.84%	217.19	186.99	16.15%
Saveur[8]	375,000	387,659	63.66	71.16	-10.54%	273.85	349.95	-21.75%
Showboats International	50,000	52,440[b]	202.50	98.00	106.63%	907.00	585.13	55.01%
Ski[8]	425,000	428,179	206.71	168.02	23.03%	598.71	543.97	10.06%
Skiing[7]	400,000	404,361	133.56	130.30	2.50%	453.04	428.33	5.77%
Slam	None	196,678	59.58	42.67	39.63%	377.51	217.83	73.30%
Snowboarder[8]	70,000	-	106.67	101.21	5.39%	597.22	511.42	16.78%
Southern Accents	375,000	376,340	179.31	166.64	7.60%	179.31	166.64	7.60%
Sport Rider	100,000	103,214	49.11	41.98	16.98%	286.30	247.69	15.59%
Traditional Home	800,000	823,807	119.27	115.17	3.56%	515.85	445.21	15.87%
Travel & Leisure Golf	350,000	356,889[b]	117.06	78.86	48.44%	434.05	322.48	34.60%
Walking[7]	650,000	664,315	76.40	59.24	28.97%	385.07	316.08	21.83%
CATEGORY TOTAL			**4,451.33**	**3,812.25**	**16.76%**	**21,473.01**	**19,369.09**	**10.86%**

FOOTNOTES: RATE BASE AND CIRCULATION FIGURES ACCORDING TO THE AUDIT BUREAU OF CIRCULATIONS FOR FIRST HALF OF 2000 EXCEPT b=AUDITED BY BPA INTERNATIONAL; c=NON ABC/BPA TITLE; e=PUBLISHER'S ESTIMATE; x=DID NOT REPORT TO ABC BY PRESS TIME. 7=PUBLISHED SEVEN TIMES PER YEAR; 8=PUBLISHED EIGHT TIMES PER YEAR; 9=NINE TIMES PER YEAR; @=PUBLISHED ONE FEWER TIME IN 1999; @@=PUBLISHED TWO FEWER ISSUES IN 1999; +=PUBLISHED ONE MORE ISSUE IN 1999.

IT'S A LOT EASIER TO DO YOUR JOB

WHEN YOUR CONSUMERS DO IT FOR YOU.



Tired of sampling the old way? Let your consumers do the work, so you can catch some z's. While you're drooling on your file folder, consumers will log on our site, answer a few questions and pick from a list of products targeted to them. It's interactive, so you can get quick feedback on purchase intent and other valuable information. Which means they get exactly what they want and you get exactly who you want. It's a simple idea. And a powerful way to convert consumers into loyal customers. For more information on how FreeSamples.com can help your brand, call 800.886.2823 or e-mail bullseye@freesamples.com.

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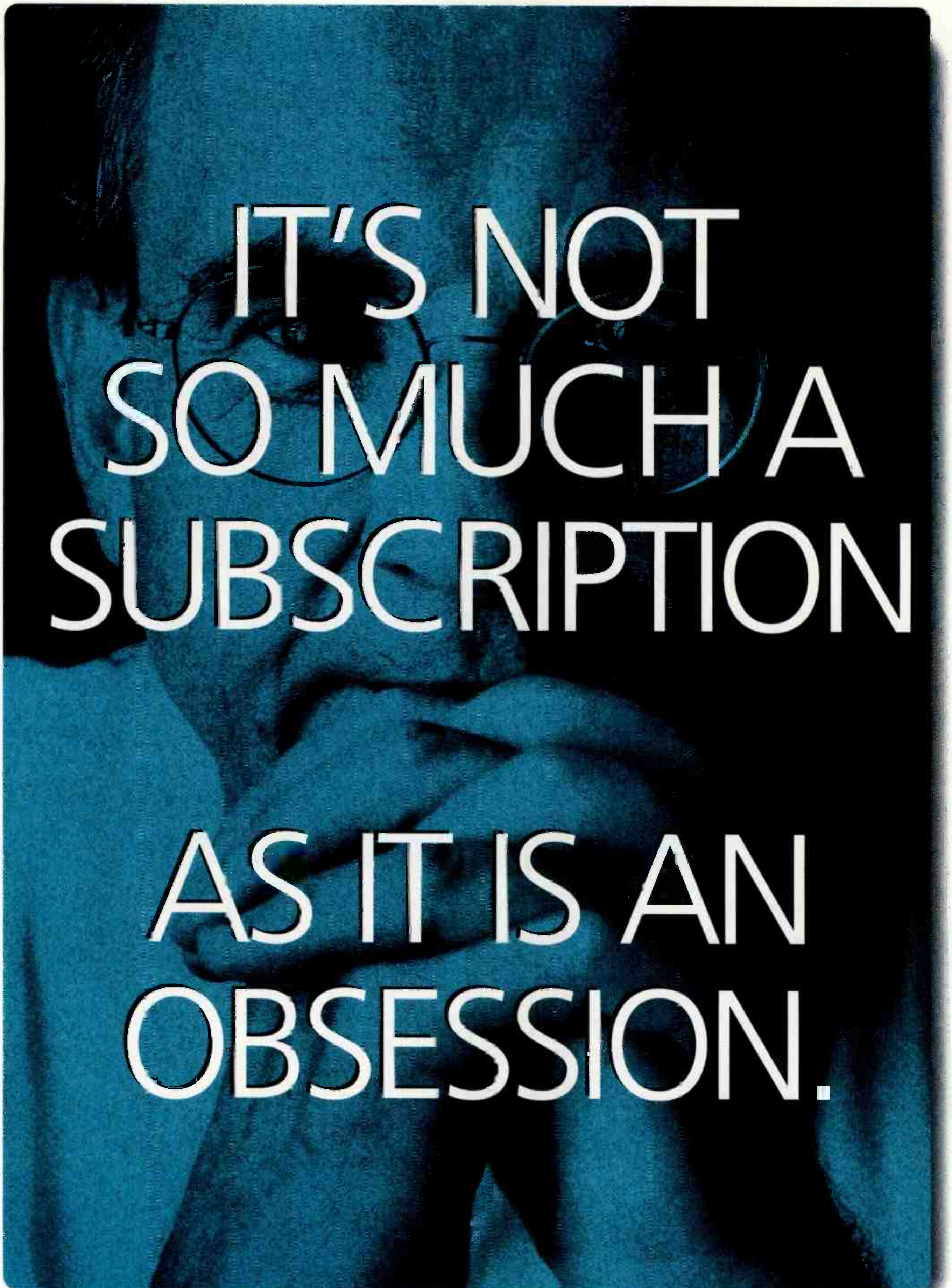
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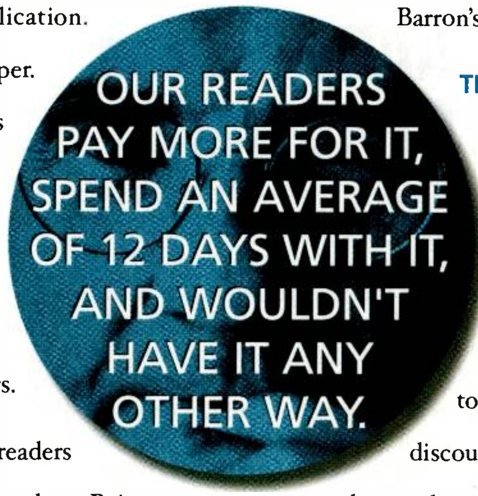
AS IT IS AN
OBSESSION.

HOW DO YOU MEASURE PASSION? It's difficult at best. But, being in the research-and-numbers business, we find that passion does leave statistical footprints in the snow: our subscribers pay $197 per year for their IBD — more than subscribers of any other national business publication. Why? IBD isn't just a newspaper. It's also a research tool that helps them make money. So they pay top dollar for IBD and rely on it every day. As an advertiser in IBD, you reap the undivided attention of very involved readers.



LAST 12 TIMES LONGER. Our readers keep their IBD an average of 12 days. Being a research tool, its value persists long after competing dailies, and the ads in them, hit the recycle bin. In essence, you get the frequency of a daily with the endurance of a weekly. One that's read thoroughly. Sections are marked, clipped. Compilation books made. For a "daily," IBD makes lasting impressions.

WHO ARE THESE PEOPLE? Our average reader is just your average millionaire. 57% have total assets in excess of $1 million. While that's great for them, consider that 31% are owners or partners of their own companies. They oversee or are directly responsible for the procurement of everything that a company needs to run properly. And when they aren't buying useful things for the company, they're buying shiny, expensive things just for themselves. Hey, they've earned it.

REACH IS ONLY IMPORTANT when you're reaching the important. If you're focusing your marketing effort on highly successful businesspeople, know that IBD has a higher concentration of president, CEO and COO subscribers than BusinessWeek, Barron's, and The Wall Street Journal.

THE NAKED TRUTH, PART II: Perhaps a greater indictment of some of our old-school Wall Street competitors: IBD is the fastest-growing national newspaper. Without resorting to the prevailing tactics of deep discounts or soft sales buried within student and employee subscriptions, hotel bills and rental car contracts to prop up their otherwise declining circulation. Some even want ABC audit rules to count 75%-off giveaways as valuable media. Meanwhile, IBD has grown 178% over the past 10 years, gaining market share every year. Our readers are passionate about our product. Want them to feel the same way about yours? To place an ad, or for more information, call us at 1-212-626-7676.

Low Audience Duplication

Of IBD subscribers, only a small proportion see the need to also subscribe to the following:

Wall Street Journal	17.8%
Forbes	17.1%
Barron's	13.3%
BusinessWeek	11.8%
Fortune	9.5%

DON'T READ IT. USE IT.™

the first for newly named editor in chief Richard Spencer. "The read is a little more sophisticated," says Spencer, whose readers' median age is 14. "It was very cute all over...It just looked too young."

Emap's 2 million-circ *Teen* got a head start on the competition earlier this spring with a redesign in March. For November, its first 16-page Web insert *GO! Girls Online* will debut, says Lynn Lehmkuhl, Emap youth group president.

"They got their eyes opened a bit by the *Teen People*'s and *CosmoGirl!*'s of the world that are doing a better job in being in touch with what teenagers want," says Vikki Schwartzman, senior vp/managing director of strategic print services at Universal McCann on veteran publications *Teen* and *YM*. "And now they are adjusting to that." *—with Lori Lefevre*

Oringer to Seek Opportunities

'Newsweek' taps Meredith vet

Newsweek last week tapped Hal Oringer to become vp/strategic planning and business development, a new position. Oringer, who for the past six months was vp of sales and marketing at Meredith Interactive Media, spent an additional seven years at Meredith in consumer marketing and development.

"Hal's experience in magazines, books and the Web will be incredibly valuable to us," says *Newsweek* president/COO Harold Shain. "His responsibilities are going to be to help us sort through several business opportunities we're considering right now."

Over the past year, *Newsweek* has dabbled with both partnerships and acquisitions. Last November, *Newsweek* parent The Washington Post Co. inked a deal with MSNBC and NBC News to pool their news and technology resources. Then in January, *Newsweek* acquired the 350,000-circ bimonthly *Arthur Frommer's Budget Travel* for an undisclosed sum from Group XXVII Communications.

Oringer, who joins *Newsweek* Oct. 2, will evaluate startups, acquisitions, brand extensions and partnerships within and outside The Washington Post Co. "[*Newsweek*] has been doing very well and there have been a number of opportunities that have surfaced over the last couple of years and nobody to pursue them," says Oringer. "I know that Harold and [chairman/editor in chief] Rick [Smith] have often been somewhat anxious that they're not getting to all the things they feel compelled to get to."

Newsweek's paid circ for the year's first half dipped 1.3 percent to 3.1 million, according to the Audit Bureau of Circulations. Ad pages through Sept. 25 were down 3.7 percent to 1,629 over 1999, reports *Mediaweek* Magazine Monitor.

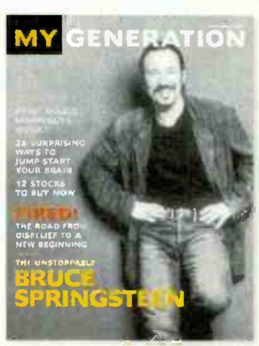
AARP Seeks Glory Days

Boomer spin-off due in March

You know rock 'n' roll, and the baby boomers who grew up on it, are getting old when the new spin-off title from the American Association of Retired Persons, coming out next March, features Bruce Springsteen on its mock-up cover. It certainly lends new meaning to the phrase, "Maybe we ain't that young anymore," from the Jersey rocker's "Thunder Road" anthem.

Well, pull out those glasses, boomers, because this spin-off isn't your parents' magazine. AARP, which publishes geriatric title *Modern Maturity*, will launch *My Generation* (the title is a rip-off of the classic Who song). It will start off with a rate base of 3.1 million, made up mostly of 50-to-55-year-old members of AARP. The balance will come from AARP's first newsstand effort (cover price $2.95.)

The age group certainly is plentiful—someone turns 50 every six seconds—and it already has a few reading choices, like the two-year-old women's book *More*, published by Meredith Corp. But are boomers ready for a magazine about getting old? "The magazine isn't going to be about measuring your blood pressure every 15 minutes," says editor in chief Betsy Carter, a boomer herself. "It's not going to be about getting older as much as the things that they are thinking about at this phase of their life."



The Boss meets The Who: AARP's spinoff riffs on rock.

And what does the Boss think? Springsteen's representatives did not return phone calls. Carter says there's no plan to use the rocker, who celebrated his 51st birthday last Saturday, on an actual cover of *My Generation*. "He's more symbolic of what we're trying to do," she says. *—LL*

60 SECONDS WITH...

Jack Rotherham

VP/Publisher, *Rolling Stone*

Q. *Last year* Rolling Stone *cranked out two year-end double issues. What's on tap for this year?* **A.** We're packaging three year-end issues. The first year-end special is the "Rolling Stone & MTV Present: The Top 100 Songs" issue...[which] hits newsstands Nov. 17. The second special will be a year-end double I, the photo issue, which will feature the 50 coolest people of the year on sale Nov. 24. The year-end double II, on stands Dec. 8, is the "Yearbook 2000," issue and will review the best in music, movies, technology, television etc. **Q.** *Through the Sept. 28 issue,* Mediaweek *reports* RS *is down 5.9 percent to 1,297 pages over the prior year. What accounted for that dip?* **A.** No surprise, we got hit by tobacco. We were seeing a decline in tobacco spending in the first half before the Philip Morris news hit. Happy to report the other [tobacco] folks are hanging strong. And we completely lost our Columbia House and BMG record-club business. The good news is it's low-revenue business. But [to] Publisher's Information Bureau, a page is a page and it's hard to explain that without acknowledging it. **Q.** *How are you making up the losses for tobacco?* **A.** We're seeing good signs from big brands—automotive, fashion, technology, entertainment, and on a really high note, retail. When the year shakes out, hopefully we'll be a point or two up in pages, but revenue should be double-digits. **Q.** *You've been there for 13 years, first as a sales rep. How do you stay golden?* **A.** I think it's my charm...And, how should I say this? Maybe I'm a bit resilient to the chaos...or I thrive on it.

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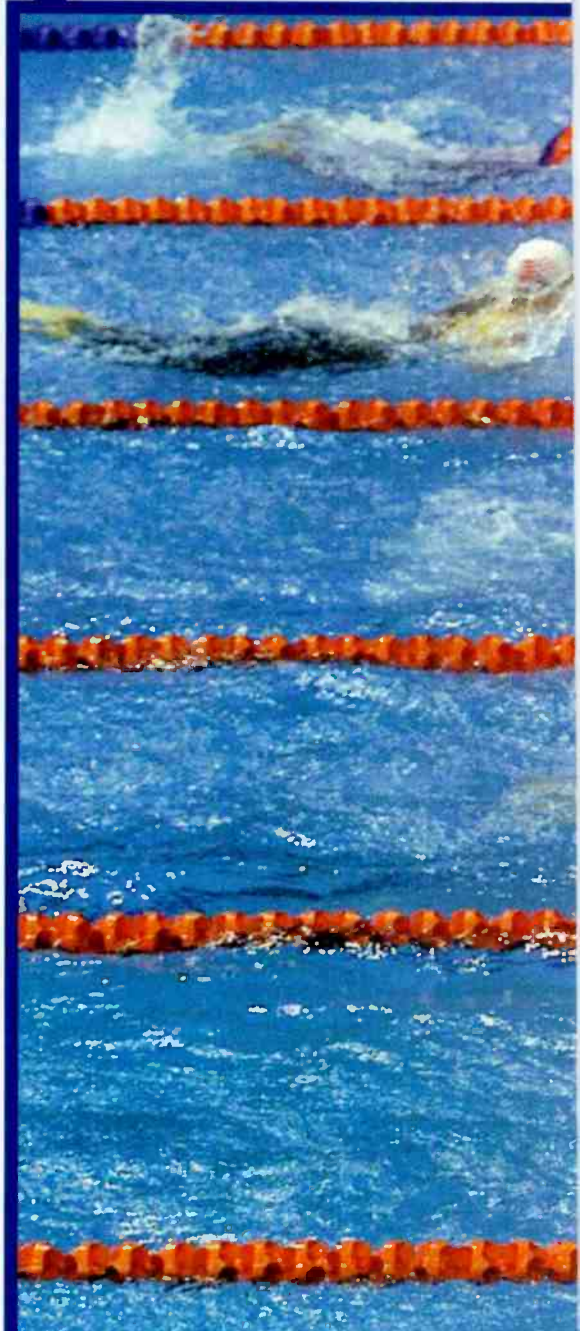
Olympic

Covering the Sydney Games as well as the IOC's scandals presents a serious dilemma for news organizations, especially NBC

By Alicia Mundy

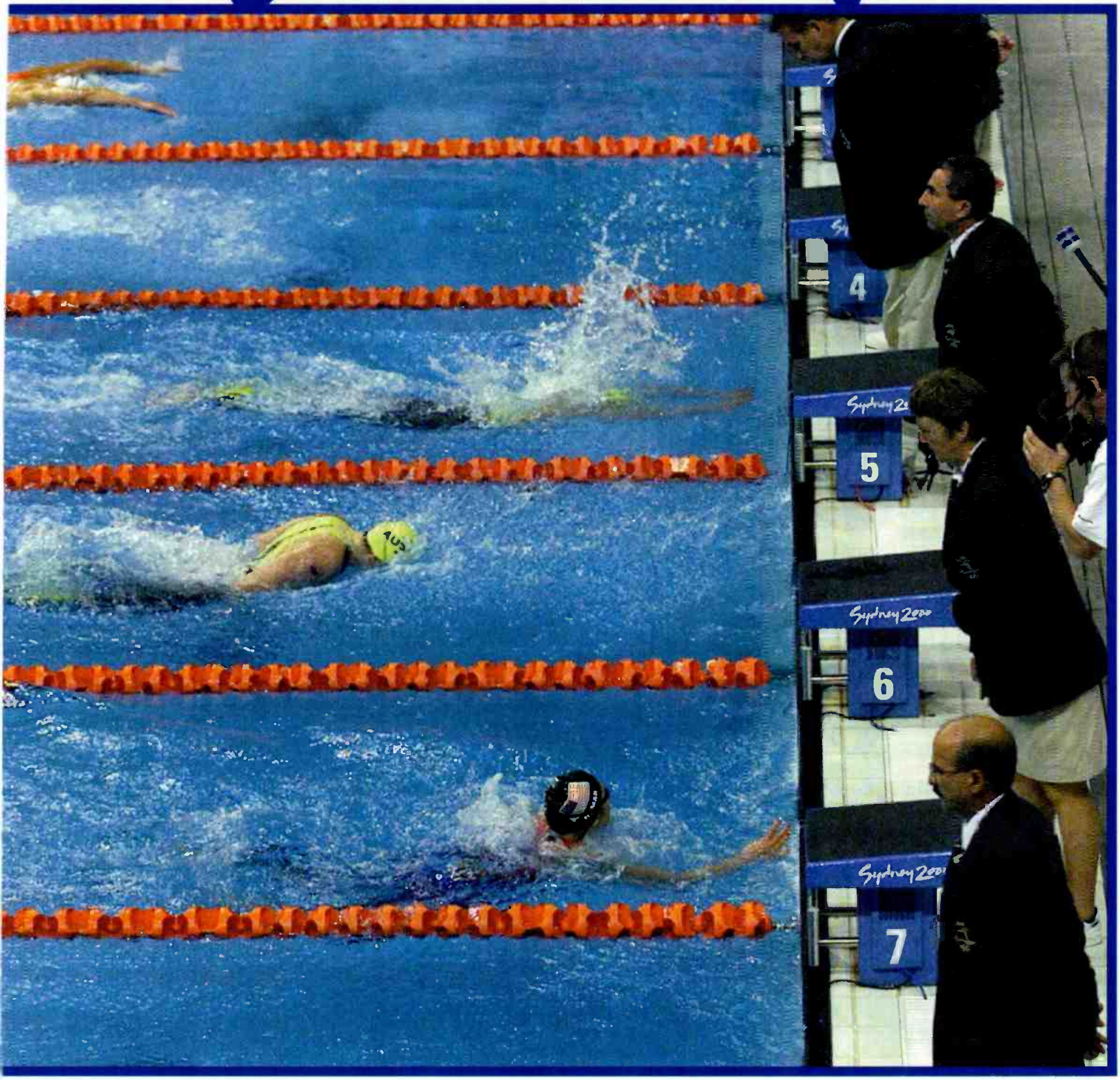
Hope you like Sydney. We may be back here in four years." That was the joke being whispered in expensive suites in the Regent Hotel, where the British Broadcasting Corp.'s Adam Minott was interviewing members of the International Olympic Committee as the 2000 Summer Olympics got under way.

Shaky sponsors, particularly American corporate moguls, were also talking quietly about growing concerns that the Olympics scheduled for Athens in 2004 might have to be moved. The problem: the potential for terrorism in Greece, as well as the lack of progress on facilities. It's a major headache for American sponsors, a looming problem for NBC—which is providing one of the primary sources of income that make the Games possible—and a story that simply won't go away. But there's been almost no mention of it in the media. That's



Deep end of the pool: Some journalists who've reported on the scandals complain about IOC members trying to intimidate them.

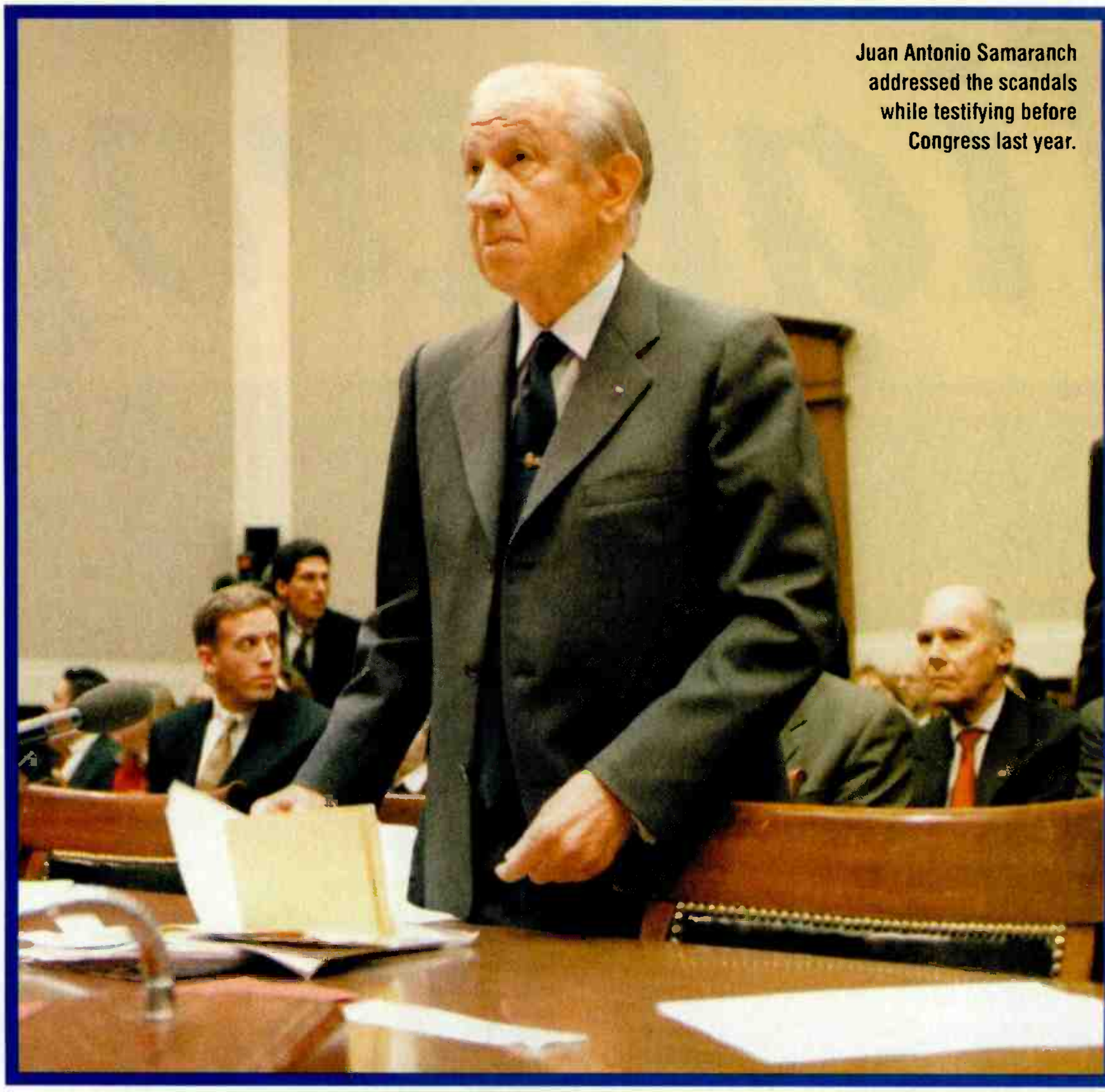
Tightrope



because, despite promises of reform and openness, the IOC has made covering Olympics, Inc. a challenge of Olympian proportions.

On July 4, *The Wall Street Journal* reported on terrorism in Athens, saying that Greece had made no serious effort to crack down on the notorious November 17 group. That organization allegedly assassinated a British military officer in June and a week later tried to bomb an American government facility. As a result, the State Department threatened to place Greece on a list of countries that don't police terrorism.

Representatives of major U.S. Olympic corporate sponsors, including Visa, suddenly became concerned that they would be the likely targets of terrorism in Athens. But the IOC's reaction to the story was an attempt to spin sponsors and to attack the *Journal*. The *Journal* defended itself in an editorial, telling readers, "In the end, our reporter will be thanked."



Juan Antonio Samaranch addressed the scandals while testifying before Congress last year.

IAN WAGREICH/ONLINE USA, INC.

By the time the Sydney games began, the word at corporate cocktail parties, say Minott and reporters for *The Washington Post*, *The New York Times*, *Washington Times* and *Los Angeles Times*, was: The IOC may need a fallback position, even if it means returning to Sydney.

But the official position from the IOC's public relations firm, Hill & Knowlton, is that the Athens Games "will take place as scheduled. These concerns have all been addressed." One hopes so, as NBC has already sent the first part of the seed money to the Athens Organizing Committee to pay for their infrastructure arrangements.

There has been a litany of complaints from reporters about heavy-handed behavior by the IOC and its communications czar—and that has spread to some sponsors and advertisers, who have said that they don't think the IOC has been straight with them. Many are clearly worried about their investment. But they're not saying it for the record, because right now, IOC members tell reporters, the word has gone forth at the highest levels that the IOC will not be happy with any member or sponsor caught divulging "negative" information to the media.

But that's been the IOC style. In January 1999, facing a credibility crisis, the IOC hired PR giant Hill & Knowlton to handle the media. Shortly after, the *Journal* broke a story on the secret internal IOC report on corruption in the system and with the Salt Lake City choice. The *Journal* had been one of the only major papers to follow the money trail. This presented a problem for the IOC because "the *Journal* is the paper the sponsors read," as a Hill & Knowlton staffer acknowledged. Soon, the IOC's PR director, Franklin Servan-Schreiber, and reps from Hill & Knowlton began a barrage of phone calls to *Journal* editors and reporters. In the spring of 1999, Hill & Knowlton met with *Journal* managing editor Paul Steiger and other staffers, wherein Hill & Knowlton discussed the IOC's progress and concerns about the potential "agenda" of certain *Journal* reporters. One Hill & Knowlton executive told *Journal* reporter Stefan Fatsis that the publicity machine had compiled a list of reporters whose coverage troubled the IOC. (The Hill & Knowlton executive now in charge of the IOC account, Mike Kontos, says he does not know of any such list.)

Schreiber, meanwhile, complained bitterly to *Suddeutsche Zeitung*, a nationally distributed newspaper in Germany, and to *The Australian*, Rupert Murdoch's flagship paper down under, about their reporters, according to British reporter Andrew Jennings, author of *The Great Olympic Swindle*. After a scathing story in *The Australian* written by Natasha Bita, Schreiber wrote a very critical letter to the editor saying, ominously, "In the past, I have given to Natasha wide access to the IOC upper echelon..." Bita took this as a veiled threat that her access could be jeopardized in the future.

Last March, after a couple of public confrontations with Australia's high-profile IOC member, Kevan Gosper, *Journal* correspondent A. Craig Copetas was pulled off a plane in Singapore just before it left for Sydney. He says that he was told by Singapore authorities that his name had popped up on a list of suspected criminals and terrorists maintained by the Austrialian government. The matter was straightened out. He was detained and then released. Copetas and a *Journal* spokesperson say they don't know who might have put his name on the Australian database.

Danish reporter Lars Jorgenson nearly came to blows with Schreiber after Schreiber told other reporters that Jorgenson had made up a published report about a private meeting involving IOC President Juan Antonio Samaranch and a Danish IOC member. "I told him, 'The next time you want to smear me, you come to me first,'" says Jorgenson.

Of such claims, Schreiber says, "Ridiculous. Ridiculous. Ridiculous."

Many reporters believe the IOC has tried to downplay the serious issue of performance-enhancing drug use by some athletes, which raises larger questions of credibility. "You can't trust anything you see," says reporter Jere Longman of *The New York Times*. "With performance-enhancing drugs, you can't believe any result beyond a reasonable doubt." That story, he thinks, is worse than the corruption issue, but he notes, "It takes a lot of commitment for a paper to cover the Olympics" as a business, not a sport.

The *L.A. Times* made the commitment last year, sending two reporters around the globe to do a seven-part series on the IOC. At first, writer Alan Abrahamson ran into a wall at the IOC. Then an influential Korean IOC member told him: "Human relationships are all. They are the key to understanding how the IOC works and how the deals are made." That insight, he said, helped him understand why certain members have not been disciplined at the IOC, and about the ties between NBC and the IOC.

"It's not black and white," says Abrahamson of the IOC culture. "It's gray." The series was incredibly detailed. However, it was not particularly critical of Samaranch or his inner circle. Shortly after that series ran, Schreiber's press office sent notes recommending it to several reporters, with an e-mail suggesting that this was the way the IOC should be covered.

Even in the middle of the Olympics in Sydney, there is a hostile relationship with members of the media who don't tow the official "athletes triumph" storyline—availability of credentials is both a carrot and a stick. "If you're not a ringhead," said one U.S. journalist, "they do their best to ostracize you." A few days before the Games began, the *Journal* ran a front-page story saying that Samaranch had asked the president of Indonesia to release a jailed financier, in order for him to attend the Olympics.

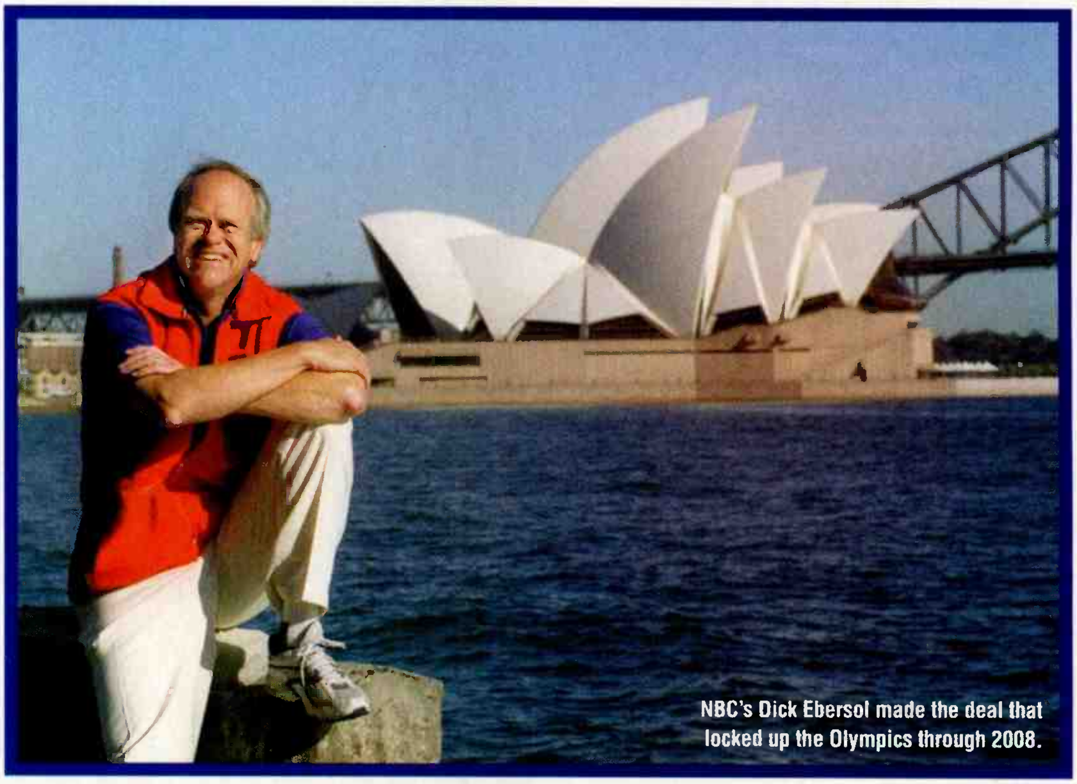
It was an embarrassment, following news that Australia had refused entry to a boxing official allegedly linked to the Russian mafia. Transparency International, an organization that tracks international corruption in governments and corporations, issued a report that said, "On the eve of the Olympic Games, it is worth recalling the bribery scandal that enmeshed the IOC and the fact that some of the leaders of the bribe-scarred IOC are still running the show." It flew in the face of promises to the sponsors, goverments and the media that the IOC had cleaned up its act.

At a news conference following the story on the ties between Samaranch and the jailed Indonesian banker, IOC member Jacques Rogge of Belgium told reporters who kept asking about the contretemps, "The opening ceremony is Sept. 15. If you want to reach it, you should change the subject."

At the next press conference, the BBC's Minott and *New York Times* columnist George Vecsey, along with several European journalists, sported *Wall Street Journal* publicity pins in a show of solidarity. "I wore it with pride," says Minott.

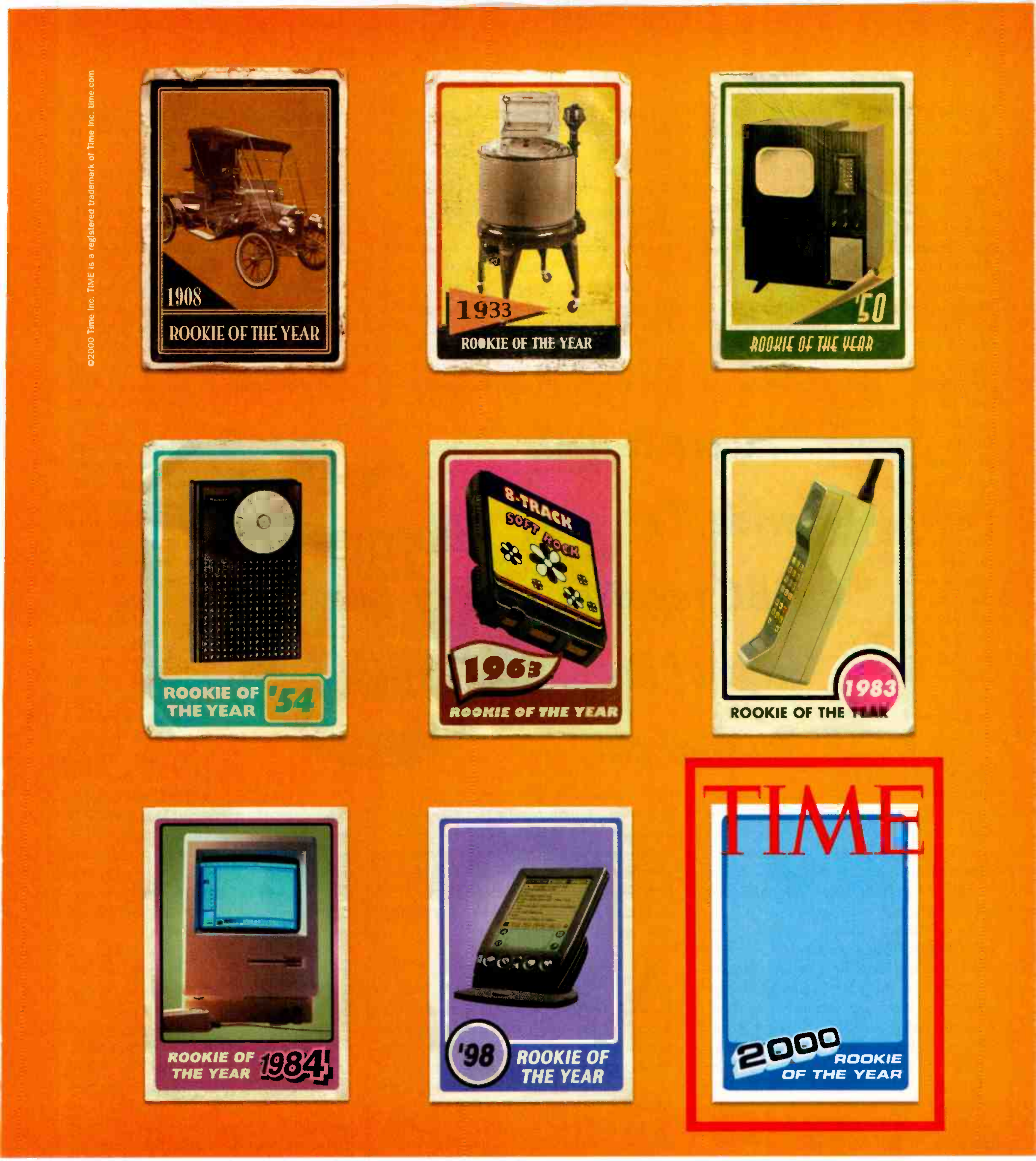
The issue of how to cover the noncompetitive aspects of the Olympics is particularly complicated for NBC. Its unprecedented long-term contract, which cost $3.6 billion and gives it TV rights to all Olympiads through 2008, raises conflict-of-interest flags everywhere. The unusual relationship puts NBC—a news organization, a sports organization and a partner in the IOC—in a precarious position. But NBC spokesperson Kevin Sullivan says the network doesn't understand "where you see a perception of conflict."

"You're kidding me," says *Sports Illustrated*'s Frank Deford, one of America's most respected sportswriters. He thinks the treble roles make NBC an "enabler" of the problem-ridden IOC. "How can the IOC clean up its act when it's got NBC to fall



NBC's Dick Ebersol made the deal that locked up the Olympics through 2008.

JOHN GRAINGER/NEWSPIX



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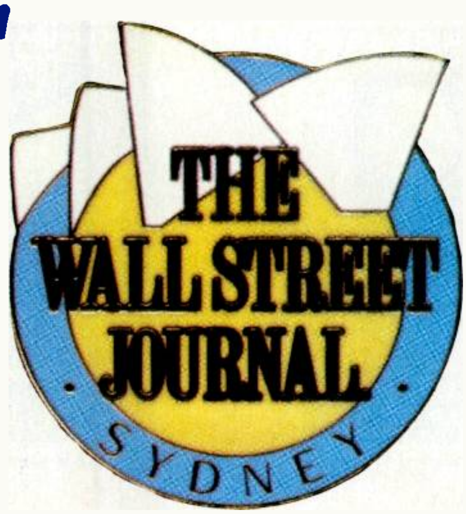
back on? And NBC is not going to force reform. Mostly, it won't want to hear about doping up and the corruption issues."

That may explain the angry outburst last June by Dick Ebersol, chairman of NBC Sports. David D'Alessandro, president of John Hancock Financial Services, had announced he was withdrawing about $50 million in sponsorship of a package beginning with the 2002 Games, and complained about all the IOC scandals. After hearing D'Alessandro's continuing comments, Ebersol lashed out about him during a conference call with reporters. *The New York Times* reported him saying, "I'm sick of watching this two-bit bully get on his soapbox...His actions demanded a response and that response is: Shut up."

It was apparently Ebersol's way of assuring sponsors that the scandal was ending, and that their money was safe—and it made several IOC members happy that someone was finally standing up for them. But it was a strange role for an NBC executive to play.

"I wore it with pride," a BBC reporter says of his *Journal* pin.



But that's what comes of dual roles. One man who embodies the problems of conflict of interest, says Deford, is NBC Sports senior vice president Alex Gilady, whose longtime ties to Samaranch helped Ebersol get the exclusive contract for three Olympics. Since 1994, he has also been Israel's represenative on the IOC.

Last December, according to the *Journal*'s Copetas, Gilady confronted Copetas in the bar at the Lausanne Palace Hotel in Switzerland in the presence of several other reporters, including Andrew Jennings. Copetas and fellow *Journal* writer Roger Thurow had just broken a story saying that Samaranch was more closely linked to the late Spanish dictator Francisco Franco than he had previously admitted. The timing was unfortunate: Samaranch was about to testify about the IOC's corruption problems before a Congressional meeting.

As Gilady berated Copetas, the reporter said, "I don't wanna hear it."

Then Copetas turned on Gilady and reminded him about an earlier story the *Journal* had published about Jennings, who has become the scourge of the Olympic organizers. Interviewed for that piece, Gilady had dismissed Jennings' various exposés on the IOC, telling Copetas that Jennings had a personal vendetta. He had told the *Journal* that Jennings' uncle had been killed fighting against Franco in the Spanish Civil War. But Copetas had learned that Jennings' only uncle was an accountant who hadn't travelled farther than Wales.

"You fed me a fake story. You lied to me. What was that all about?" asked Copetas, "You've been feeding us crap."

"So what," said Gilady. And as the crowd looked on, he stuck his fingers in his ears, stuck out his tongue and make a vulgar noise. Gilady declined to be interviewed for this article. NBC Sports also declined to make Ebersol or Olympics coordinator Peter Diamond available for comment. Through NBC's Sullivan, Gilady denied that he "gave false information to a reporter."

All of this makes life difficult for NBC News, perched as it is on a tightrope. *Nightly News* producer Albert Oetgen says that the sports division's contract has not influenced the news (though for a while, NBC was running the Olympic rings on the screen during Tom Brokaw's newscast). "When the major corruption stories broke in early 1999," Oetgen says, "we were determined we would cover them as hard, or harder, than the other networks."

Ebersol, says Oetgen, has not tried to influence coverage. However, in one instance he apparently tried to spin Oetgen. When interviewed by Oetgen for one of the corruption fallout stories, Ebersol, "like any executive of a company" aggressively gave his point of view about the issue, says Oetgen.

NBC's coverage on the earlier scandal issues has matched ABC's and CBS'. But on Sept. 8, NBC skipped major news about a White House report on performance-enhancing drugs and Olympic athletes. *CBS Evening News* led with the story and *ABC World News Tonight* included it before the first commercial break. But it was back in the NBC broadcast, relegated to three lines. And during the week leading up to the Olympics, *Nightly News* ran several puffy profiles on Sydney and the athletes. Some reporters wonder whether this was typical promotional synergy of a television network or an attempt to soften the blow from negative coverage in other outlets. Oetgen denies it was the latter.

NBC began its coverage of the opening ceremony on Sept. 15 with an 11-minute piece about Olympic problems. Running in the 7:30 time slot, it focused on the Salt Lake City scandal and, via interviews with various officials, implied that the major problems at the IOC were being addressed. But there was no mention of the embarrassment regarding the ongoing allegations of ties between some members of the IOC and their associates to criminal elements. Or to the looming issue of the Athens Games.

One NBC staffer, who asked for anonymity, explained, "This is the athletes' time now—it's not the time to bring back the negative stories.

And, though acknowledging worries from sponsors and IOC members about problems with Athens, the NBC staffer said: "There is no way politically those Games will be moved. Just to talk about it publicly would cause a diplomatic storm that would hurt the Games and everyone."

Including NBC?

"Yes."

So the Games, and the games, continue. Athens or bust in 2004. Or as Adam Minott says, "See you in Sydney."

Alicia Mundy is Mediaweek*'s Washington bureau chief.* ■

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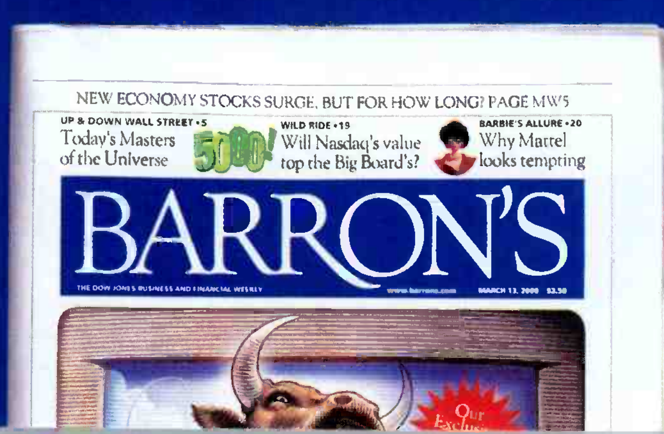

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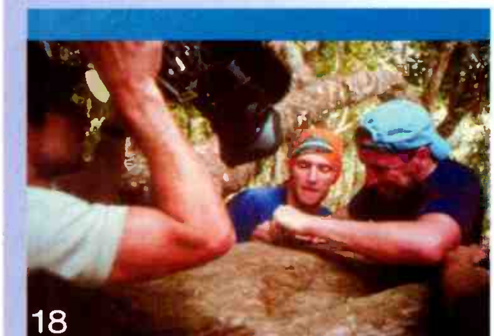

Cover Illustration By Chip Wass

EDITOR'S LETTER

How long can the good times last? No one can say for certain, except possibly Alan Greenspan, and he isn't telling. Like the incredibly robust overall economy, the advertising business is surfing toward 2001 on a wave of high demand and high expectations.

According to the experts at Veronis Suhler & Associates, the communications industry was the fastest-growing segment in the American economy from 1994 to 1999—outpacing even financial services. Fed by the public's insatiable appetite for information and entertainment, the industry will maintain that leadership position over the next five years, Veronis predicts. The media-industry merchant bank forecasts a compounded annual growth rate of 7.8 percent, making media a $745.8 billion business by 2004.

Not surprisingly, the Internet's role is expected to keep expanding. By 2004, Veronis predicts, Web advertising (a forecast $24.4 billion) will surpass cable ($21 billion), network television ($19.4 billion) and consumer magazines ($16.4 billion).

In addition to Alan Gottesman's economic overview and Jack Feuer's look at the challenges facing the auto business, the *Special Report* team examines the various segments of the industry, trying to make sense of the numbers. Each medium is affected by its own set of challenges and windfalls: The magazine biz's circulation woes. Spot TV's post-election hangover. Radio's consolidation-driven CPM creep.

Unless the master economist in the sky changed the immutable laws of market economics and forgot to copy us on the e-mail, the torrid growth of the last few years is bound to cool at some point in the future. When? Who knows? So enjoy the party while it lasts.

Keith Dunnavant
Editor, Adweek Magazines' Special Report

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If you believe in the prescience of the stock market—which has, for example, forecast four of the past three recessions—the advertising industry is heading for a slump. The only agencies whose stock prices are higher today than they were at the start of the year are those soon to be (or heavily rumored to be) taken over at premium prices.

Despite the weak stock prices, however, there is nothing in these companies' financial reports that's signaling a slowdown. Still, the stock market will sometimes adjust for, or discount, events long before they eventuate. Are we seeing, in this unimpressive stock-price profile, a real yellow flashing light or just another false alarm? The best bet right now is false alarm. But despite ten years of uninterrupted growth, the industry has not become the first tree that will reach to the sky. The ad business will likely find itself squeezed when the economy puts on the brakes. Indeed, the ramifications could be severe, since so few agency chiefs today have senior-level experience in managing through a contraction.

But it probably won't happen in 2001.

Given the current favorable economic conditions, the lack of any clear signs of a slowdown and the head start that the ad sector got from a record-breaking upfront advertising market, the outlook for 2001 remains good, maybe even very good.

don't worry, be happy

With no recession in sight, our economic fortune teller expects advertising spending to keep growing in 2001

BY ALAN GOTTESMAN ILLUSTRATION BY CHIP WASS


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Although there's a lot more to the marketing-services industry than merely the U.S. advertising sector—industry giants such as Omnicom, Interpublic and WPP take in less than half of total revenue from media advertising in the U.S.—it's still the tail that wags the dog. For one thing, U.S. media advertising remains the largest single piece of the global marketing-services industry. For another, mainline advertising tends to hold a pivotal place in clients' marketing plans, with disciplines such as sales promotion and direct-response advertising commonly perceived as ancillary. So the outlook for U.S. advertising is important across a broad spectrum of related businesses. And the outlook is good.

The first clear peek into next year's results came several months ago, when the major TV networks accommodated their largest clients—who are, for the most part, the world's largest advertisers—in the annual upfront bazaar. Prices ranged from 10 percent to more than 20 percent ahead of the comparable airtime buys of 1999. More than $8 billion worth of airtime was sold in total, most of it to run in 2001. The money hasn't all been handed over yet, merely promised; but even the promises are a good indicator of the major clients' willingness to spend with near abandon. And the upfront market, more often than not, sets the tone for media volume and prices in general.

In the annual upfront bazaar, prices for next year ranged from 10 percent to more than 20 percent ahead of last year's air-time buys, a good indicator of major clients' willingness to spend with near abandon.

U.S. advertisers are responding to the continuing strength of American consumer demand. The surveys of consumer confidence reveal a barometer reading that's very high. Remember the old "misery index"? It was a compound with inflation and unemployment as ingredients. One can still run the formula and come up with a number, but with unemployment hovering at a 30-year low and inflation barely noticeable, the answer wouldn't matter much.

In theory, the faster the economy grows, the greater the inflationary pressure: A growing economy puts pressure on employers to find the labor to keep output growing. When the demand for labor (or any commodity, for that matter) increases faster than the supply, the price (or, for labor, the wage) goes up. When their costs rise, businesses attempt to recoup their increased expenses by raising prices. That's one way inflation happens. Historically, inflation has a tendency to spook consumers, who then retrench, leading the economy to cool down, or worse. Is anyone out there now spooked? Not hardly.

Can this happy coincidence of an expanding economy, trivial inflation and free-spending consumers continue forever? Many observers note that the economic system has become more efficient, largely due to technology. Some of the pressure that would normally elevate prices and ultimately trigger all sorts of disaster is being relieved through greater productivity. The basic law of supply and demand, however, has not been repealed—just, perhaps, amended.

Indeed, an examination of the results in the upfront market shows the law is still in force: With advertisers paying more to reach fewer viewers, price inflation is in full effect. Advertisers continue to demand access to the large audiences that only the TV networks can deliver; the supply of such audience units may actually be shrinking. So the price of whatever availabilities are on the market follows the law of supply and demand. Inflation just hasn't struck in the greater economy. And, of course, it may not.

One likely scenario is a "soft landing," with the present pace of economic expansion declining moderately and taking the edge off the forces that would normally drive inflation (the economy expanded 5.3 percent in the second quarter, up from 4.8 percent in the first, both rates being well above the usual trigger points for inflation). In a soft landing, the economy would not crash and the growth rate might even remain positive.

Whatever happens, the U.S. economy is too big to turn rapidly, and there are few signs that its spunky performance is about to moderate. Some of the more interest-sensitive sectors have responded to the rate increases we've experienced over the past year, in particular the residential-real-estate market. But there's no evidence that the softness here is dampening other aspects of consumer behavior. Retail sales, for example, were up 5 percent year over year in the second quarter, a healthy rate.

The rosy forecast for 2001 is similar to the outlook expressed 12 months ago for 2000. As before, the greatest danger to the industry is its vulnerability to economic weakness. Might that be changing?

The industry has a structural upward bias: Every new product and product category needs to get its message out. The ad industry has no shortage of customers. In the past decade we've seen several good examples of ever-increasing demand as an enduring trend. The telecommunications industry, after the breakup of AT&T, became a free-for-all, in advertising terms, with a large number of companies trying to establish themselves as consumer brands all of a sudden and all at once. With deregulation, even more outfits come along, each offering services that are hard to explain, especially to consumers who know nothing about selecting a long-dis-

tance or local phone carrier. And that is all separate from the cellular-service industry, which is delivering another new bundle of ad customers.

Another example: When the federal government eased the rules covering prescription-drug advertising, making it practical to talk to consumers directly, another rousing new customer class was created for the ad industry.

The dot-com industry was different in that the ad demand arose faster, and some of the dot-commies were placing ads on their own facilities in addition to traditional media—but it was basically just the latest example of how every new product or service adds to the demand on the system. And as each new advertiser comes into the system, what happens to the older ones? Nothing. For the most part, they are still there.

In other industries, a persistent rise in demand would eventually stimulate the production of new supply. But that's hard to do in advertising, where the unit of supply is not the commercial or ad page or poster facing—there's no limit to these—but rather the rating point or the impression. Ads don't count unless they are seen or heard, not merely broadcast or printed. Unless large numbers of people are spending materially more time "consuming" advertising, the supply of advertising impressions won't change much, no matter how many new forms of media arise.

This imbalance between supply and demand goes a long way toward explaining the ad industry's economic durability—why it has, for example, experienced only two annual declines in the last 50 years. Another factor in its endurance is that most advertising is aimed at consumers, and the consumer sector has been the fastest-growing component of the economy.

There are a lot of reasons why the ad sector will continue to chalk up a good long-term record of growth, including the fact that for all its bulk, it still accounts for a trivial share of the gross domestic product (1.37 percent, to cite figures compiled by Zenith Media); there's plenty of headroom for more gains. But there will likely be bumps and stumbles along the way.

Businesses cut back on advertising when they don't have the money to advertise or they reckon that customers are scarce (unlike now, when customers are generally rich and confident). Moreover, since a business under pressure will look to lower costs, advertising is often among the first expenses trimmed, because it's so easy to do.

Most ad media have rate cards, but if you're a major advertiser, there's usually room for negotiation. As media sense a fall-off in demand, they tend to lower their prices. That's a normal reaction, since lower prices, in most circumstances, draw in the bargain hunters and stimulate sales. But there's a phenomenon that's peculiar to two markets, advertising and stocks, that works the other way.

In Wall Street's case, for some mysterious reason, investors can't seem to sell a falling stock fast enough. Additional selling lowers the price further, which then intensifies the selling pressure. Consider the investor on the sidelines, one who might be watching a stock at, say, 43 and waiting to pounce if it ever reaches 40. What happens if the stock plummets to 37? Our investor, more than likely, will sit on his wallet and congratulate him or herself for having avoided a disaster. If you liked it at 43 and were willing to buy it at 40, you ought to love it at 37 – a real bargain. But the first reaction is to fear that something has gone wrong and withdraw from the market.

The same thing happens in advertising. If a medium suggests a price for an ad package that is cheaper than an advertiser was expecting, rather than pounce on the bargain, the advertiser holds back. That, of course, encourages the medium to offer its next customer an even better deal, which spins the cycle one more time. The advertising industry and the stock market may be the only two instances where, when the merchandise goes on sale, customers run out of the store. (Interestingly, the same process works in reverse. Advertisers and investors are as likely to chase rising-priced goods as they are to flee decliners.)

The advertising industry and the stock market may be the only two places where, when the merchandise goes on sale, the customers run out of the store.

This double-whammy effect—a slackening in demand, causing a decline in prices—can slow or halt the ad industry's growth. True, many advertisers would not cut their ad plans. But, thanks to a slumping market, they would wind up spending less than they first budgeted, due to the lower prices.

It's not possible to predict what, precisely, will trigger the next retrenchment in the economy. Most economists think that the current rate of economic growth is unsustainable. The self-correcting mechanisms that temper the system and that might, ultimately, bring on a recession are still operable—we just don't know what will light the fuse.

And although we can easily make the logical case that advertisers ought to stay the course regardless of a souring economy and not cut their advertising, many probably will. But based on all available evidence, the slowdown is not likely to happen in 2001. ■

Alan Gottesman, a securities analyst and independent consultant, writes frequently for Adweek.

AUSTRALIA: *Annie Griffiths Belt captured a boatload of costumed Sydneysider spectators*

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The DIARY *of a* PLANET

a rocky road

With unit sales expected to slow a bit next must make tough media choices

To paraphrase the famous line about General Motors, what's good for the car business is good for the media. The automotive industry spends more than any other on television and magazine advertising, and a dramatic shift in car spending—as in 1999, when Ford cut $100 million in print advertising—has dramatic impact. Is it an ominous sign, then, that the road to success in model year 2001 figures to be a lot bumpier than the smooth ride carmakers have enjoyed in the past few years?

Like yawning potholes hidden around a curve, some vexing challenges face the automotive industry. Even the most conservative estimates place car sales for 2001 at 500,000 to 1 million units below 1999's record 18 million vehicles, but there's been no letup in production. That means that fall launches will be slugging it out for slices of a significantly smaller automotive marketing pie.

"The economy is slowing down, and we're all continuing to try to sell new and ongoing product in an aggressive way to maintain share position in the marketplace," says Steve Sturm, vice president of marketing for Toyota. "As you can imagine, that's a challenging environment."

The problem of vehicle supply is "a real biggie" for the new model year, and not just for new cars, says Tom Healey, partner and director of the advertising and media division of J.D. Power and Associates in Agoura Hills, Calif. "We're going to be up to our armpits in used cars," he predicts.

There are several other issues that will also impact car-ad strategies: the rocketing cost of network television, which is forcing a reevaluation of the medium; the extension of the new-model launch period beyond the conventional September-October months, with new product continually filling the pipeline; and, despite Ford's current struggles with Tiregate, the continuing thirst for sport utility vehicles among the public, putting even more pressure on car marketers in what has become, arguably, the most critical category in the industry.

In the car business, everything begins with television, so it's no surprise that car marketers start with that medium when discussing trends in the new model year. Higher network rates, in fact, have kept and even increased the industry's traditional 70-30 ratio of TV to other media, despite the fragmentation and proliferation of new-media options like interactive television and the Internet. In 1999, for example, network, cable, syndicated and spot TV accounted for more than $5.5 billion of the total $8.3 billion-plus spent on automotive advertising. While no manufacturer is willing to put a numerical value on the impact of escalating network-TV rates, no one denies the effect.

Last year, cable and syndicated television advertising rose by more than 20 percent each, and spot television increased by 16.8 percent. Network rose 9.5 percent in the same period, to $2.3 billion in 1999.

"Over the last couple of years, network -TV costs have demanded funding," says J.D. Power's Healey. "The ratings keep going down and the demand goes up, and they have to fund that from somewhere if they want to stay in."

One enduring trend in automotive advertising that is not likely to change in model year 2001 is carmaker pressure on magazines. For at least a decade, auto advertisers have been wrangling with the magazine industry about accountability, and manufacturers routinely shift their spending, or cut it dramatically, as their relationships with magazines rise and fall. Ford, for example, recently slashed its print budget by $100 million. Toyota, reflecting the manufacturers' determination to make magazines more efficient, is pondering a plan that

year, auto makers in the battle for market share

BY JACK FEUER ILLUSTRATION BY CHIP WASS would dramatically reduce the number of magazines in which it advertises.

Automotive advertising in magazines increased 8.9 percent, to $1.7 billion, last year, according to Competitive Media Reporting.

"There's just a general awakening, across the automotive industry, of what print can and cannot do, when you look at the confidence with which automakers are slashing print budgets," says one media director. "We have 50 magazine reps blowing smoke up our ass with such consistency that we're never allowed a breather to give a second thought about the accountability of the medium."

"I think, for whatever reason, some of the books lost perspective of who their customer was, in terms of companies like Ford Motor Co. and what our needs are from a brand perspective," says Michelle Vervantez, who until recently oversaw Ford's corporate media and its media-buying arm, Ford Motor Media. Vervantez was one of the architects behind the $100 million shift in magazine spending. "In the past, what would happen was [magazines] would create something, and if so-and-so didn't buy it, they would dust it off, and then they would go see some other brand. Well, that's not what we need."

But magazines are still an important component of any car media mix, including Ford's. The automaker—which has sworn off filming new commercials until the strike by the Screen Actors Guild and the American Federation of Television and Radio Artists is over—recently launched a unique print program for the Ford Escape, the automaker's new sport utility vehicle. Ford and its agency, J. Walter Thompson, Detroit, created 15 two-page "advertorials" tailored to individual magazines, each with a sweepstakes aimed at that publication's audience.

"There's a general awakening, across the automotive industry, of what print can and cannot do."

As for the Internet, car makers still don't know quite what to make of the medium—or even if it is an ad medium. Online shopping has become a fact of life for car buyers, but for car marketers, cyberspace's usefulness as a brand-building medium is still in its infancy. According to AdRelevance, a division of Media Metrix, the automotive category spent $59.9 million on online marketing in the 12 months ending last June, the most recent period for which figures are available. Growth in online advertising in model year 2001 is likely to be small.

"We're trying some new Internet/CRM initiatives," says Kenny Laurence, director of global media at DaimlerChrysler, which will have a busy 2001 model year with the launch of redesigned minivans and a new iteration of the Chrysler Sebring. "We're looking at different venues and different ideas to try to stay on the leading edge of media planning and buying. But nothing that we've jumped into 100 percent and said, 'This is the way to go.' We're still evaluating the worth of Internet advertising."

Adds Fred Sattler, executive media director at Mazda agency Doner in Southfield, Mich., "Manufacturer Web sites are an important stop in the shopping process for consumers, but a big question mark still hangs over the content sites and the kind of true persuasive advertising opportunities they afford us."

Media strategy into the next year will also reflect the changing time frame of new model launches. "There's no one time to launch anymore," explains Richard Weigand, media director for Toyota shop Saatchi & Saatchi, Torrance, Calif. "We just had the Corolla face-lift in June and the Solara convertible launch in May. There's just so much desire for keeping things fresh, none of us could probably physically [launch all new models] at once."

While many new models will premiere as the leaves change color—including Toyota's eight-passenger, full-sized SUV the Sequoia and Acura's MDX, that luxury line's first effort in the SUV market— others won't bow until sometime next year, such as the Buick Rendezvous in spring of 2001.

It's no accident that all of those vehicles are sport utilities. Half of all U.S. car buyers are now opting for an SUV (and the category doesn't even include other light trucks such as compact pickups), and the airwaves, print pages, outdoor boards and banner ads will the reflect SUV's ongoing importance.

"Everybody's waiting to see what the next new vehicle hit is going to be," says one automotive marketing insider. "In the meantime, they're running out every conceivable permutation of the SUVs. This is the time of the hybrids, like Pontiac's Aztek." Along with the Plymouth PT Cruiser, the Aztek is probably the weirdest vehicle anyone will see on the road this year.

Numerous other variables are likely to directly influence automotive advertising in the new-model year. No one knows yet how seriously Ford's troubles with tire safety will affect its sales. Will the Koreans' newly robust sales health continue? Will the Europeans continue to do well? And what effect will General Motors' ambitious new planning entity, Planworks, have on the world's largest advertiser's efforts? (GM spends just under $3 billion annually.) In fact, so consuming is the creation of Starcom MediaVest Group's Planworks that GM begs off even discussing planning for 2001 yet.

For the nation's automotive marketers, nobody really knows what's around the corner, but one thing's for sure: It will be a wild ride. ■

Additional reporting by Tanya Irwin and David Lipin.

NETWORK TV

Long-Term Survivors

Mass reach is sustaining the networks as they show signs of renewed vigor

BY JOHN CONSOLI

MONTY BRINTON/CBS

STILL STANDING The success of *Survivor* proved that the networks haven't lost their ability to capture widespread public interest.

Advertisers' love affair with network television continues at a torrid pace. But financial analysts are predicting that ad spending may slow a bit in 2001 before picking up again in 2002. That forecast is based less on the anticipated performance of the networks and the economy in general and more on the inevitable post-Olympics, post-elections lull.

Veronis Suhler & Associates is projecting that the broadcast networks will take in $16.2 billion in ad revenues this year, up 7.5 percent from the $15 billion they generated last year. Network-TV advertising is predicted to increase at a compound annual growth rate of 5.2 percent from 1999 to 2004, reaching $19.4 billion in 2004. But Veronis Suhler is forecasting that spending on network TV will increase only 1 percent in 2001, rebounding to a 6.3 percent increase in 2002.

The broadcast networks do have a chance to upset the economic model, however, by coming up with some must-have shows. ABC (*Who Wants to Be a Millionaire*) and CBS (*Survivor*) have recently proved this can be done, just as NBC had proved it over the years with its Thursday-night block of *Friends*, *Frasier* and *ER*.

And if the networks were ever in a position to prove the financial analysts wrong, now is the time. While just a few years ago many advertisers were experimenting with optimizers to move their ad dollars out of broadcast TV in order to reach consumers more cost-efficiently, most in the current hot economy have developed a rejuvenated respect for the networks' mass-audience reach.

Remember, there were few financial analysts who predicted that the six broadcast networks would crack the $8 billion mark for the first time during the 2000-2001 upfront ad-buying period. Though that's not to say the networks can just sit back and let the ad dollars roll in. Advertisers do get ratings guarantees, which the nets must meet to get full payment for their commercials. And the mortality rate of new shows is still high. "Almost 70 percent of the shows debuting last season did not make the cut for this fall," points out Steve Sternberg, senior vice president of broadcast research for TN Media.

The networks renewed a total of 18 shows out of the 56 that premiered during the season—the highest renewal rate (32 percent) since the 1996-97 season. Those numbers are way up from the 1997-98 season, when only 13 out of 65 shows were renewed, and significantly up from the 1994-95 and 1995-96 seasons, when only 11 shows were renewed.

And as CBS proved this summer with its reality series *Survivor*, put on a show that captures the public's interest and it will watch in droves, even during the summer television drought. CBS drew a record audience to the *Survivor* finale, and the network was able to charge as much as $600,000 per 30-second commercial—four or five times

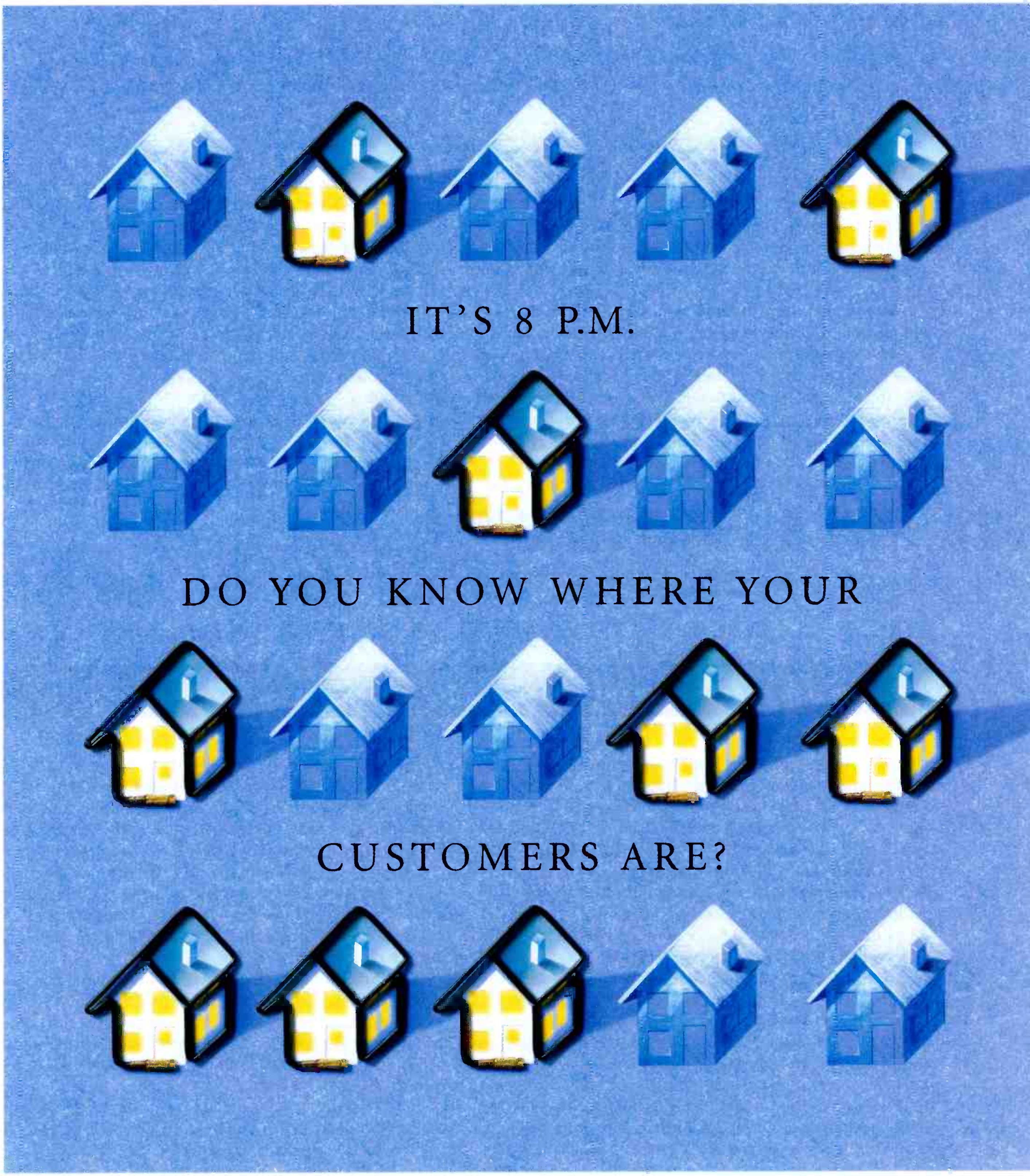


Illustration by Jayme Odgers ©2000

what it charges for spots on most of its regular-season prime-time shows.

The success of *Survivor* and *Who Wants to Be a Millionaire* has the networks scrambling to come up with unique types of programming that will catch on with viewers who have defected to cable.

Survivor brought in many new younger viewers, enabling CBS to promote its fall schedule to this audience. Viewers who tune in to the network's fall shows for the first time could translate into stabilized or even increased ratings for the network this season. Ditto for ABC, which has used its hot game show, *Who Wants to Be a Millionaire,* to promote its fall schedule, and NBC, which is pushing its fall shows during its two weeks of Olympics coverage.

Also in the networks' favor, advertising growth has continued over the years, despite the networks' losing audience share to cable. And according to Veronis Suhler's annual industry forecast, the networks' prime-time audience share now seems to have stabilized. In 1999-2000, for example, it was 55 percent, the same as in 1997-98. Veronis is predicting that will drop to only 54 percent next season and will remain at that level through the 2001-2002 season. At the same time, prime-time TV households will continue to increase, meaning more viewers will be watching despite the slight dip in share.

Most important to broadcast-network television is the fact that, in Veronis Suhler's analysis, the Internet is not cannibalizing TV usage. Citing a Nielsen Media Research survey, Veronis Suhler reports that households hooked up to the Internet were lighter TV viewers even before they had Web access. And a Statistical Research Inc. study finds that nearly 50 percent of home computers are located in the same room as a TV set, and more than half of computer users work with them in locations where they are unlikely to compete with TV, such as schools or the office.

The Veronis Suhler report also points out that viewers watched more television in 1999 than ever before, an average of 7.43 hours per day, up from 7.3 hours in 1998, 7.2 hours in 1997 and 6.9 hours in 1990.

As the $8 billion committed in advance for the fall 2000-2001 network-TV season indicates, advertisers seem to have moved away from their heavy reliance on optimizers in determining where their ad dollars are spent. When optimizers came on the scene about three years ago, they were seen as a tool that advertisers and their media planners could use to more efficiently spend money by better targeting viewers. In effect, that meant spending more money on the individual cable networks and less on network TV. That hasn't panned out to any serious extent.

Dave Poltrack, CBS vice president of research and planning, believes that optimizers "became analytically cumbersome" and, in many instances, "yielded illogical results, like suggesting an advertiser put all its money in wrestling."

"Advertisers today are trying to create marketing statements for their products that transcend 30-second spots," Poltrack says. "They are looking for programs where their products can establish a unique identity, like Reebok did this summer on *Survivor.*"

Poltrack also believes that network-TV shows using Internet tie-ins will be able to lure ad dollars that were previously spent exclusively on the Internet. "We are sensing a bit of a retreat by advertisers who were putting money into the Internet alone," he says. "Five years down the road, the Internet may be the way to go, but advertisers have to think about what works today. And they are finding that the mass reach of television is better suited to moving their products."

Network TV's loss of Olympic and political dollars, as well as the softening of dot-com advertising, Poltrack says, will be offset by the battle shaping up among wireless-communications advertisers. "The home-technology ad sector will get stronger in 2001, and network television should benefit from this," he says.

Also helpful this year should be the fact that the networks offered advertisers more realistic audience guarantees during the upfront, lowering the likelihood that networks will have to give advertisers audience-deficiency ad units this season. That, Poltrack says, means the networks will have more scatter units to sell at higher prices if some of their new shows take off among the viewers.

"Next year will continue to be a very strong one," Poltrack says. "We don't see an economic downturn in the cards." ■

John Consoli covers network television from Mediaweek's *New York headquarters.*

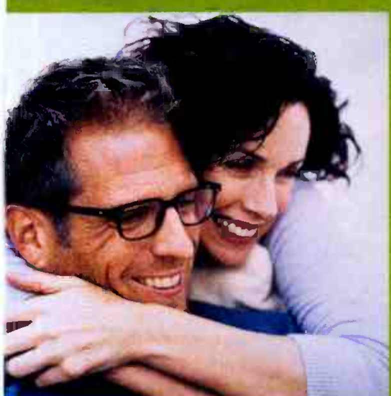
NETWORK TV SPENDING

'90	'91	'92	'93	'94	'95	'96	'97	'98	'99
$9.9	$9.5	$10.2	$10.2	$10.9	$11.7	$13.2	$13.3	$14.1	$15.0

2000 SPENDING: $16.1 2001 SPENDING FORECAST: Veronis +1% Zenith +11%

All numbers in billions Source: Veronis Suhler, except 2001 forecast: Zenith Media Services

The ultimate running mate



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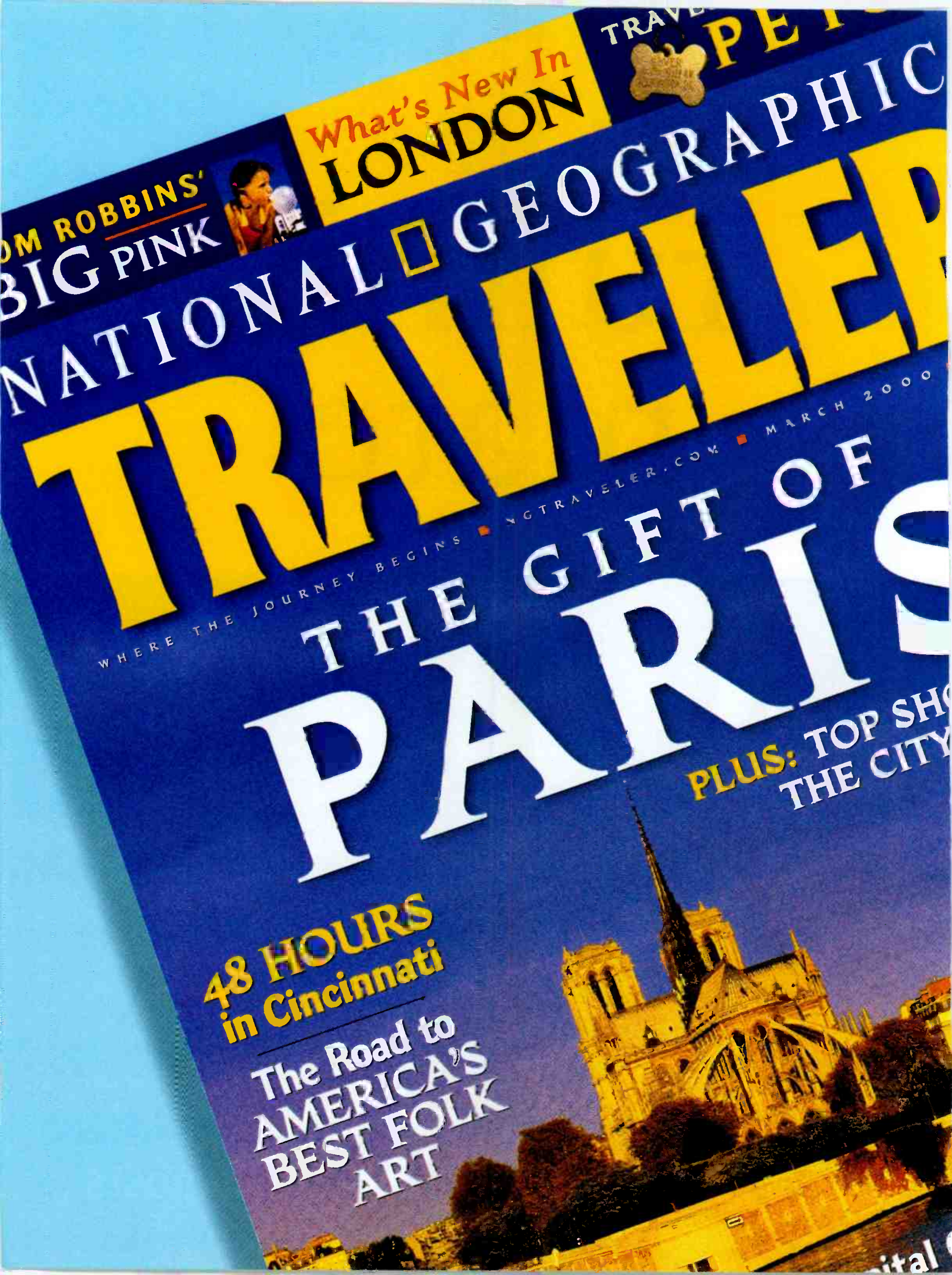
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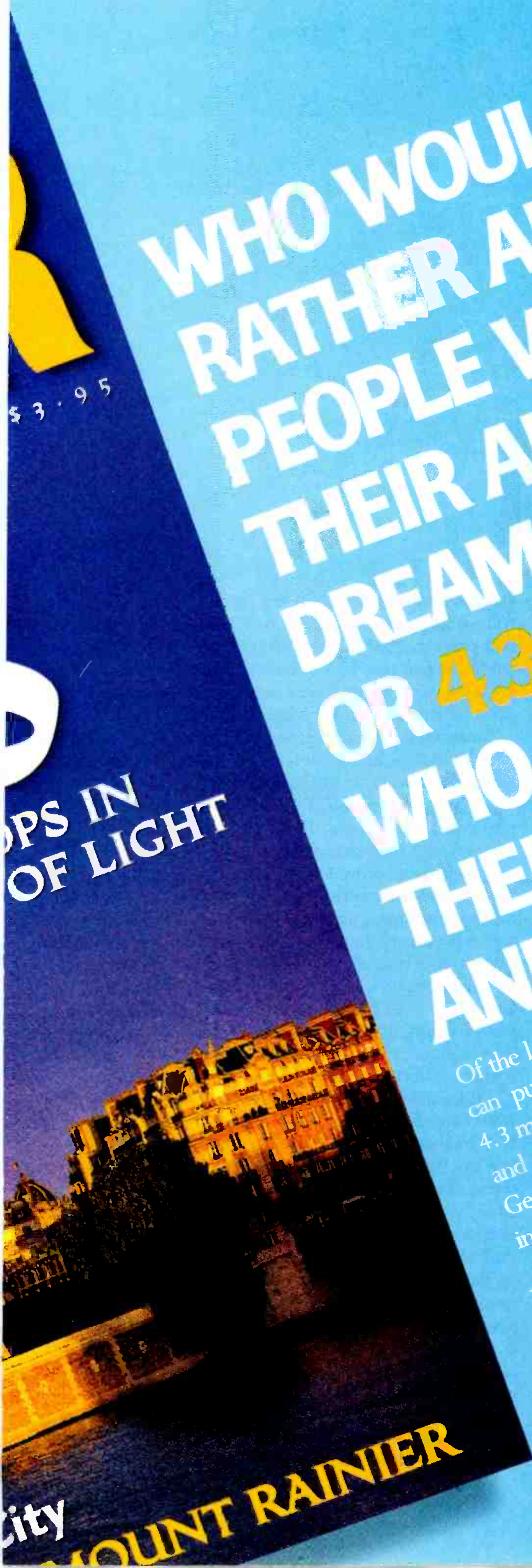

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Balancing Act

Publishers will need fancy footwork to stay on the high-growth track

BY LISA GRANATSTEIN

Thanks largely to a roaring economy, the consumer-magazine industry has been enjoying record-breaking revenues. And the good times are expected to roll into next year. But maintaining that growth will require Flying Walenda-like finesse.

As publishers seek to enhance their bottom lines, they will be challenged by increasingly fickle advertisers, like tobacco companies and automakers, and by the formidable high-wire act of bolstering circulation, both single-copy and subscription sales. In recent years, circulation has been plagued by newsstand clutter, wholesaler consolidation and the demise of sweepstakes-driven subscriptions. Multi-platform marketing and brand extensions are some of the ways in which publishers will attempt to drive growth.

"The one question that we are all asking ourselves is, How long can the advertising boom continue?" says Michael Clinton, Hearst Magazines' senior vice president and chief marketing officer. "It has been a spectacular few years in the magazine business. Granted, we are living in a new economy and there will be new places to grow business, like technology and the Web, but there will be other places where there may be softness."

Despite the challenges ahead, industry analysts predict a modest growth in ad revenues. "Our [magazine] forecast is consistent with a degree of conservatism about the growth of the economy," says Paul Hale, managing director of Veronis Suhler. "There's a lot of uncertainty, but slow and steady wins the day."

Veronis Suhler's annual Communications Industry Forecast projects that overall spending from 1999 to 2004 in magazines will grow at a compounded annual rate of 5.8 percent, to $27.3 billion. Advertising, which has historically topped circulation as publishers' primary source of revenue, will see its share rise in 2001 to 57.7 percent and by 2004 to 60.1 percent. Over the next five years, ad spending is expected to increase by 7.5 percent, compounded annually. By 2004, Veronis projects a bump in advertising totaling $16.4 billion, up from $11.5 billion in 1999.

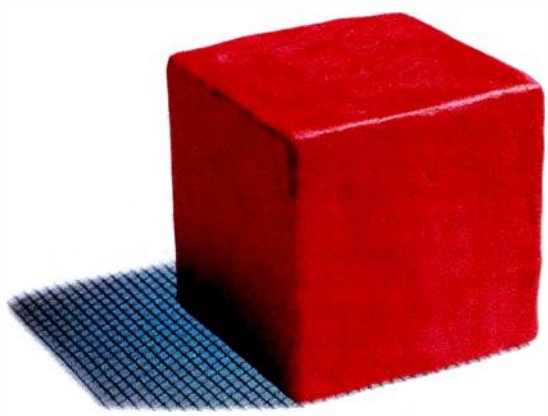
Veronis Suhler also expects ad spending to jump 7.5 percent in 2001 to $13.3 billion. Zenith Media calculates a climb of 4 percent, to $17 billion.

Clearly, the tsunami of dot-com and tech ads is pouring into publishers' pages. Early concerns that advertisers would funnel their dollars toward the Web and away from magazines have proved unfounded. This year, the Internet became such a lucrative source of advertising revenue that for the first time, Publishers Information Bureau reports, tech ads outperformed the automotive category. Through August, tech is up 57.5 percent, to $116.2 million, compared with automotive, which is down 15.5 percent, to $113.6 million. "It is clear that dot-com companies have chosen to advertise heavily in consumer magazines because they deliver defined, targeted audiences that support Web-site branding efforts," reports Veronis Suhler.

Still, publishers remain wary of the Web, especially after April's Nasdaq free fall, which led to a slew of big-spending Web companies like Boo.com filing for bankruptcy and others, like Web portal AltaVista, delaying their IPOs. "I don't think, as a marketing discipline, the Web has proved to be an industry that is well strategized yet," notes Jack Kliger, president and CEO of Hachette Filipacchi Magazines. "I can't count on it. There's going to be a lot of shake[out]."

The names may change, but the Web money isn't going away, predicts Hearst's Clinton. "It may not be the same players as companies merge and new companies are born," he says. "I don't know if we're going to see the same kind of go-go growth, but certainly we're going to see solid business there."

As publishers continue to bank on tech, many will need those ads to make up for losses in tobacco advertising. Tobacco giant Philip Morris USA this year butted out of 42



This Network can boost brands. This Technology can generate revenue. This eMail can tailor messages.

SHAPE YOUR OWN

CONSUMER MAGAZINES SPENDING

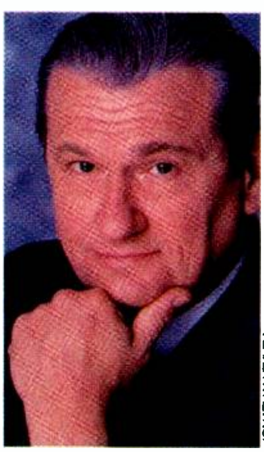
'95	'96	'97	'98	'99
$8.6	$9	$9.8	$10.5	$11.5

2000 SPENDING: $12.4 2001 SPENDING FORECAST: Veronis +7.5% Zenith +4%

All numbers in billions Source: Veronis Suhler, except 2001 forecast: Zenith Media Services

magazines (totaling over $300 million in revenue in 1999, according to Competitive Media Research) it deemed heavily youth-oriented, including Time Inc.'s *People,* Hearst's *Cosmopolitan* and *TV Guide.* "The big question mark is whether Philip Morris will come back, and my expectation is they will not," says Mark Edmiston, managing director of AdMedia Partners. "A number of publishers are still pretty dependent on them . . . and so the year-to-year comparison will hurt, because they did run in the beginning of this year."

What began as a dark year for the automotive category now appears less bleak. Ford, which announced last summer that it would put the brakes on $100 million of its print budget for its 2000 model year, has crept back into several magazines this fall, including *ESPN the Magazine,* and publishers are optimistic overall for both domestic and foreign auto ads in the year ahead. "Automotive should come back," says Kliger. "It's been a soft year, in part driven by Ford cutbacks, but their business is looking pretty good, and I don't see any indication of sales softening."



JONATHAN EXLEY

One category that promises growth is pharmaceuticals. Magazines could see a bump in advertising if drug companies are successful in their attempts to convert some of their products to over-the-counter, says Edmiston.

Some magazine-industry growth will come from cross-media trends, reports Veronis Suhler. Already, many cable properties have branched out to print, including *This Old House* and A&E's *Biography.* Now, Internet companies are seeking out print plays: Space.com is creating *Space Illustrated* with Hearst, and Microsoft's Expedia travel site will launch *Expedia Travels* with Ziff Davis Media this fall. "Internet companies are coming to see that direct, targeted advertising and promotion is what's needed," says Hale. "Producing a magazine is one way of doing that."

The circulation story, however, is only slightly encouraging. Unit circulation grew by 1.4 percent, to $9.1 billion, in 1999, a modest increase over 1998's drop of 0.4 percent. In 2001, Veronis Suhler projects, overall circ income will rise 1.1 percent, and in 2004 also 1.1 percent, to $10.9 billion—a small bump of 0.6 percent from the previous five years.

"My crystal ball says, in the aggregate, the industry circulation is going to go down," says Kent Brownridge, Wenner Media's senior vice president and general manager. "Circulation right now is shakier than it's ever been."

Veronis Suhler's Hale doesn't expect a wave of rate-base declines, because so much ad revenue is at stake. "Publishers have found the sources, regardless of the cost," he says. "They may be spending more money than they might like to replace those sources, but they're willing to keep the rate bases up because the advertising environment is so strong."

On the plus side, mergers such as the combination of Time Warner and AOL will open doors to online databases from which publishers can draw new subscribers. Meanwhile, as a desperate measure, publishers have resorted to zero- and negative-remit subscription agents, and they are increasingly using free-trial offers and heavily discounted subscription rates. Others are exploring continuous-service subscriptions and affinity programs that combine subscriptions with club memberships or product sales.

Single copies in 2001 will fall 2.3 percent, according to Veronis Suhler, and that will improve only marginally, down 2.2 percent, over a compounded five-year period. But subscriptions are expected to grow in 2001 by 1.8 percent, and also by 1.8 percent compounded annually through 2004, up 0.8 percent from the past five years.

"We believe advertisers will understand that the increases are going to be substantially higher than in previous years." —Jack Kliger

Adding to the nagging circ problems next year will be a bump in freight costs, along with the one-two punch of a 15 percent postal-rate hike and an anticipated double-digit percentage increase in the cost of paper.

"We believe advertisers will understand that the increases we are looking at are going to be substantially higher than in previous years, and even with strong advertising, magazines will not be able to offset all of those noncontrollable increases in one year," says Kliger. "This calls for new approaches to how you develop revenue and control your costs, and the circulation side is one that will be looked at by publishers very closely." ■

Lisa Granatstein covers the magazine industry from Mediaweek's *New York headquarters.*

CABLE

All Grown Up

As cable's market share keeps expanding, the forecast remains bullish

BY MEGAN LARSON

DOUG HYUN/TNT, INC.

ORIGINAL RECIPE Movies such as TNT's *Running Mates* are drawing more viewers to cable—and advertisers are following.

Coming off the first upfront period in which cable moved before broadcast networks, cable television has officially graduated from its redheaded-stepchild status in the eyes of media buyers to a place on par with broadcast. As distribution increases and cable networks press on with more original programming and aggressive ad-sales packages across multiple platforms, the robust growth of the last two years is expected to continue in 2001 and beyond.

"People's viewing habits have changed," says Neil Baker, senior vice president of ad sales for E! Entertainment. "You go home, you check out the broadcast channels and then go on to your favorite cable channels. Buyers do that, brand managers do that, and media executives at the client's [office] do that—they realize the value of cable in their own household, so they realize the value it holds for the consumer."

Though formidable reality-based offerings by CBS and ABC slowed the rapid acceleration of ratings gains by cable television this summer, analysts believe the cable audience will continue to grow at the expense of the broadcast networks. During the the 2000-2001 season, the six broadcast networks—excluding Pax TV—will average an 18.2 household rating for the total day compared with 14.3 for basic cable, according to the annual Communications Industry Forecast published by Veronis Suhler. By the 2003-2004 season, basic cable will generate an average total-day rating of 16.6, while broadcast essentially remains flat at 18.4. "Over the long term you will continue to see a shift of viewers from broadcast to cable, if for no other reason than there are so many new cable networks launched every year and consumers are getting more channels," notes Derek Bane, an analyst for Paul Kagan Associates.

The proliferation of original scripted series and big-budget made-for movies in the last year has certainly attracted larger audiences to cable's prime-time schedules, but growth is largely attributable to distribution strides made by smaller and younger niche networks. The Food Network and Animal Planet, for example, both witnessed a ratings bonanza during the first two quarters of 2000 after passing the 50 million subscriber milestone. Analysts point out, however, that the cable audience is spreading thinner as the universe expands—so that not only are the smaller networks reaping rewards at the expense of broadcast, but they are also eating away at older, more established cable brands such as TNT, MTV, ESPN and USA. Those networks have fallen from 6 percent to 13 percent in audience share during prime time over the past year, according to an analysis of household-ratings data in August provided by Nielsen Media Research.

But more than ratings and delivery, cable is purchased because of individual network brands that speak to a very specific viewer. "The concentration of audience on cable is pure," says E!'s Baker. "Very little of the client's money is wasted in reaching their target."

Cable networks netted a record $4.6 billion during the 2000 upfront—a 21 percent increase from the 1999 take of $3.8 billion. And despite erosion on some of the top ten networks this year, revenue forecasts for 2001 remain bullish.

Zenith Media predicts total-year cable ad revenue to increase 7 percent to $10.7 billion next year, from $9.5

CABLE SPENDING

'90	'91	'92	'93	'94	'95	'96	'97	'98	'99
$1.7	$2.0	$2.3	$2.7	$3.3	$3.9	$4.8	$5.8	$6.9	$8.3

2000 SPENDING: $9.8 2001 SPENDING FORECAST: Veronis +12.9% Zenith +7%

All numbers in billions Source: Veronis Suhler, except 2001 forecast: Zenith Media Services

billion in 2000. That take will rise 6 percent to nearly $12 billion in 2002.

According to Veronis, the amount of advertising dollars placed on cable networks next year will climb 12.9 percent to $11.2 billion, while local advertising is expected to increase 15 percent to $3.7 billion. Spending on regional sports networks will increase 14 .9 percent to $464 million. From 1999-2004, according to Veronis, advertising in these three sectors combined will increase at a compound annual rate of 13.4 percent to $21 billion, with the regional sports category growing at the fastest clip due to an increase in the types of sports programming offered at the local level.

"The economy is pretty strong, and the upfront in and of itself has become an indicator," says Chris Geraci, director of national TV buying for OMD/BBDO. "Corporate America is laying down media dollars for the next 18 months in advance, and that has made a pretty strong statement about the positive outlook that they all have."

GARY SPECTOR/TBS,INC.

The growth rate in cable has slowed, however, which is attributed by many analysts to dot-com advertisers. The dot-coms spent like mad last year and early this year, trying to promote initial public offerings, many of which subsequently fizzled. Much to everyone's surprise, however, retailers have trickled back in during fourth quarter 2000 to promote Web sites, which could bode well for next year.

Also, the scatter marketplace may suffer next year because advertisers spent a significant portion of their budgets during the upfront, according Larry Blasius, senior vice president and director of national broadcast for TN Media. "A certain part of the psychology leading into the upfront was the strength of the scatter market leading into it—absolutely ridiculous in terms of the numbers that were bandied about for scatter advertisers," he says. "That forced a lot of people who would have held back to go upfront. As a function of that, the networks may have done themselves a disservice."

Network sales executives have faith, however, that several categories exist which have yet to hit their spending potential. "Consumer electronics, which has probably undergone the greatest explosion in terms of product offerings in the last 8 to 10 months, will continue to ramp up with portability and wireless," says Joe Uva, president of Turner Entertainment Group sales and marketing. "We think those categories are going to drive a lot of the advertising economy and will more than replace whatever slowdown there has been in the dot-com marketplace."

Pharmaceutical spending also is expected to increase as the population continues to age. Despite consolidation in the telecommunications and packaged-goods industries, these sectors will be healthy. "Everyone has heard that because of consolidation these companies will cut back on media spending, but what is real is that each brand still needs share of voice," says Baker.

Cable networks have the opportunity to build ad revenue by packaging television platforms with their companion Web sites, because, like the channels, the sites attract a distinctive audience. Already this year, 40 percent of CNN's upfront deals had a Web component—up from 10 percent last year.

Larry Goodman, president of sales and marketing for CNN, wants that number to equal 100 percent. "Going forward you will see a fundamental shift in the definition of what gets bought during the upfront, which I hope would include analog channels, video streaming on the Web, broadband distribution and interactive TV," he says.

Adds Uva: "We have advertisers not only express interest in buying TV and executing a Web buy, but they also want the content linked between the two platforms to create a feeling of total immersion and affiliation with that content."

"Consumer electronics will continue to ramp up with portability and wireless, driving a lot of the advertising economy." —Joe Uva

The rollout of digital will bring cable additional advertising platforms as networks spin off even more targeted complementary channels. Best positioned to benefit from such a strategy are companies such as Turner Entertainment and Viacom, which already have consolidated sales divisions, says Kagan's Bane. Such dominance may make it hard for upstarts to gain a foothold in the marketplace. "It is still really difficult for an independent to get out there and launch a network," he says.

Megan Larson covers the cable industry from Mediaweek's *New York headquarters.*

SPOT TV

The Sell Cycle

Spot TV is stalling, faced with a down year and a lack of momentum

BY KATY BACHMAN

ELECTION HANGOVER The onslaught of campaign ads, such as Al Gore's "1969" spot above, will account for as much as 6 percent of spot-TV dollars this year.

Spot TV looks stagnant going into 2001, beset by a variety of troubles: the costs and controversy surrounding the transition to HDTV, confusion about ancillary uses of the spectrum, competitively rising programming costs, and the looming absence of political and Olympics spending.

"Election spending is exceptionally strong this year, which will create an election-year hangover in 2001," says PaineWebber analyst Lee Westerfield. He expects political spending to total as much as $1 billion, or 6 percent of total spot-TV dollars in 2000. With those dollars soon disappearing, Westerfield is forecasting spot TV to be flat. "And that may be a stretch," he adds.

Veronis Suhler has a slightly more positive forecast: an increase of 1.8 percent, to $25.5 billion, in 2001, with national spot going up a mere 1 percent and local a bit stronger, for a 2.5 percent gain.

Coming off a solid 6.7 increase in 2000, the spot-TV business has found itself in a vicious circle: The even-numbered years, buoyed by Olympics and political dollars, are champagne poppers, and odd-numbered years are belt tighteners. In 1999, spot TV grew only 3 percent, to $23.5 billion, compared with a 6.5 percent gain in 1998, according to Veronis Suhler.

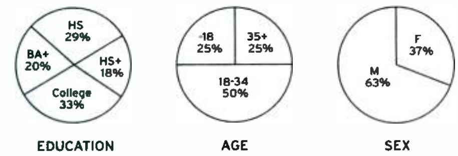
Spot TV has become such a cyclical business that this year, the Television Bureau of Advertising has decided to present two-year rather than one-year forecasts. "The business has gone into a two-year cycle, where the even years produce 8 to 10 percent growth and the odd years 3 to 5 percent," says TVB president Chris Rohrs. He is predicting low, single-digit growth for 2001.

But cycles aside, the spot-TV business will likely still have an uphill climb to regain the momentum of previous years. "Business is going to be softer for a number of reasons," says Howard Nass, senior vice president and corporate director of broadcast development for TN Media. "The economy is slowing up a bit, and the easiest thing to cut is broadcast advertising, and the easiest of that to cut is local." Nass is projecting that spending will be somewhere between flat and a 5 percent decline in 2001.

The stiff competition from cable, satellite, the Internet and a reinvigorated radio business isn't going away anytime soon. "There is a shift away from TV-station spot advertising," notes Westerfield. "Locally, most dollars are still going to newspapers, and radio is trying to poach TV's and newspapers' share."

The biggest culprit is TV's longtime nemesis, cable, which has been stealing both viewers and dollars. "Despite the hype of one or two shows pulling strong ratings, there is an audience erosion that goes to cable," says Bonita LeFlore, executive vice president and director of local broadcast for Zenith Media. "When you have 100 choices, you need consistently strong programming."

Cable has become ever more competitive, agrees Pete Stassi, senior vice president and director of local broadcast for BBDO. "Cable draws sports, and a lot of money goes to



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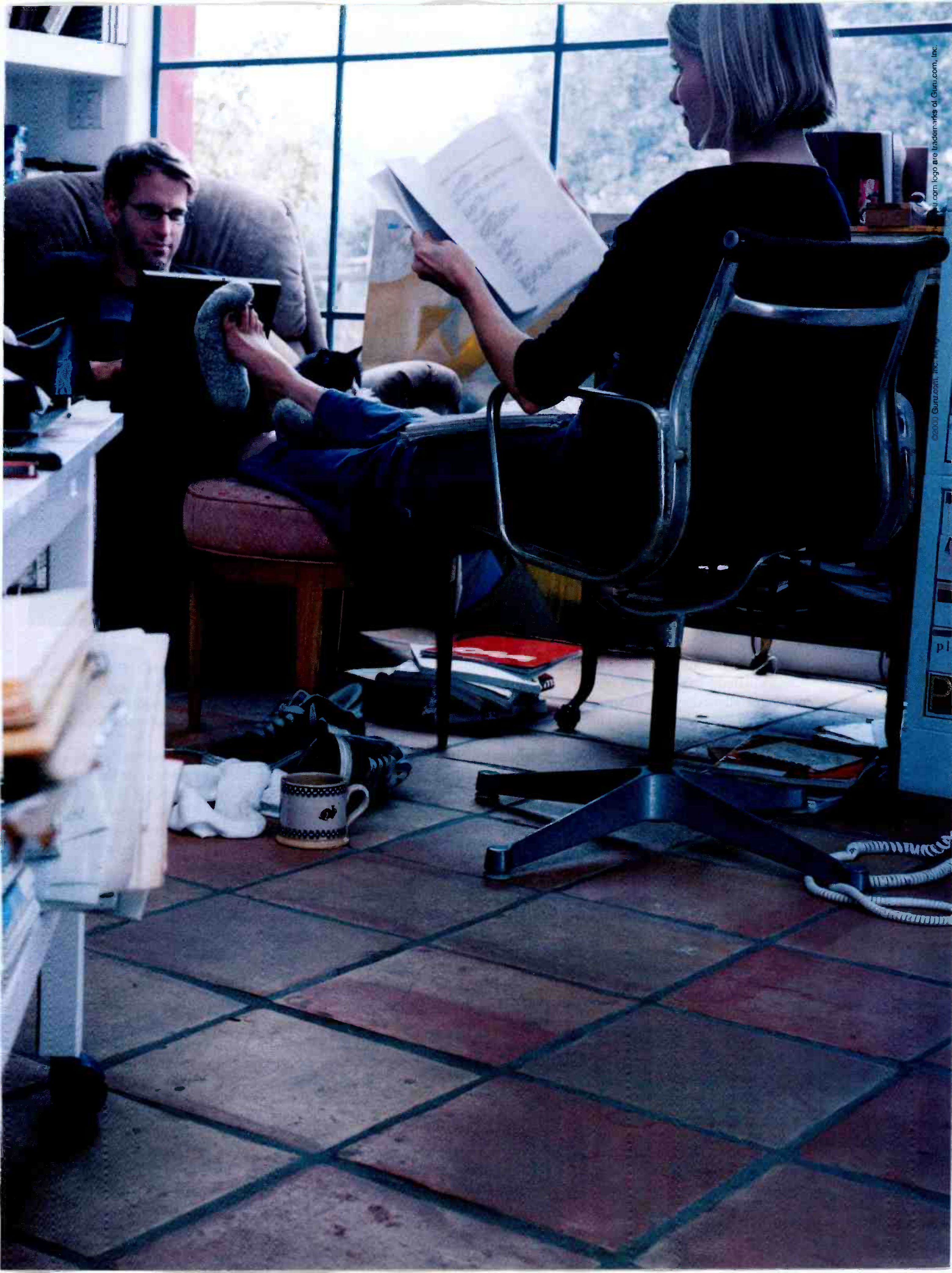

sports. It's also made some inroads and become more efficient with electronic-data interchange. In a tight marketplace, cable was getting money—now it's on your mind when you buy, and it's siphoning off money."

As advertisers allocate more dollars to other media, agencies expect spot-TV rates to hold tight or come down to remain competitive. "Some markets that had big increases in CPPs are trying to hold their ground, but that's artificial—eventually they'll come down," predicts Stassi.

But the medium has endured the worst, says TVB's Rohrs, asserting that broadcast TV is already "preshrunk." "We've emerged from the fragmentation threat and the audience erosion," he says. As for EDI, Rohrs promises that 2001 will be the year of the full build-out. "That will make us more user friendly," he says. "It will be easier for advertisers to do geographic targeting, something cable has been successful in claiming."

The automotive category could be a deciding factor for spot TV's fortunes in 2001, as auto makes up as much as 30 percent of each station's business. With the category slightly off toward the end of 2000, its performance in 2001 is still hard to predict. "It's a bellwether category for all TV stations," says Zenith Media's LeFlore. "Whether automotive advertisers spend their dollars locally or nationally, it's hard to tell."

Other strong categories that will drive the business in 2001 include retail telecommunications, pharmaceuticals and financial services. The dot-coms, which have cooled down since distorting the advertising market in general earlier in 2000, could also be a factor in 2001. Rohrs is optimistic that spot TV will benefit as dot-com advertising matures and ads are targeted to areas where specific users are located. "Those [dot-coms] that have survived will think more like marketers, and that [means] more geographically driven planning," he says.

But the savviest TV operators aren't leaving advertising prospects to chance or relying on network compensation, which has been flat for the past five years. They're looking at ways to make up the shortfall, and that means increasing local dollars, something over which stations have more control.

"The percent of a station's revenue going to local has now passed 50 percent, and that's growing as development efforts kick in," says Rohrs. "Local advertisers can see the impact of TV directly. We're seeing a dramatically increased commitment by smart groups. Over the past years, that wasn't important, but now the pie doesn't grow on its own."

Innovation is sorely needed, says Jeff Smulyan, CEO of Emmis Communications. "TV grew disproportionately for so many years, it's been lulled into complacency," he says. "TV has got to develop new sales prospects. Until it does, it'll suffer." Emmis has begun to seek nontraditional sources of TV revenue through advertiser marketing programs and event sponsorships.

Other groups have come to a similar conclusion. "2001 in a traditional sense may not be what we want it to be, but the nontraditional-revenue business may be the name of the game," says Don Browne, president and general manager of WTVJ-TV, the NBC owned-and-operated station in Miami.

Even with the number of groups assembling duopolies or forming alliances with other networks or local stations, efficiencies and cost cutting will go only so far, Browne says. "The elephant in the room is the Internet. We have to be good in our core business, but we're also attacking the Internet in an aggressive way. I'm betting a lot that it will be an upside for us in 2001."

Despite the doom-and-gloom forecast for 2001, the TV story is still developing and is bound to turn around, says Mark O'Brien, vice president of BIA Financial Network. "The real opportunity is the conversion to digital, but that won't be realized in 2001," he says. O'Brien believes that the TV business will eventually be able to earn as much from interactive TV and datacasting as it does from advertising. "There's a lot of potential, much of which is on hold and holding up the opportunities for TV to capitalize on," he says. "Until that changes, TV is going to be an ad-driven business, and that [means revenues] will be flat.

"Broadcasters have got to figure out how to get people back," adds Nass. "They've got to promote the medium. It's a great medium, but they haven't been out telling the story." ■

Katy Bachman covers the radio and television industries from Mediaweek's *Washington bureau.*

SPOT TV SPENDING

'90	'91	'92	'93	'94	'95	'96	'97	'98	'99
$7.9	$7.6	$8.1	$8.4	$9.5	$10.0	$10.9	$11.4	$12.1	$12.6

2000 SPENDING: $13.4 2001 SPENDING FORECAST: Veronis +2.5% Zenith +4.1%

All numbers in billions Source: Veronis Suhler, except 2001 forecast: Zenith Media Services

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NEWSPAPERS

Fit to Print

The news is good, led by gains in national advertising and in circulation

BY TONY CASE

The robust advertising that market newspaper publishers have enjoyed lately is expected to continue into the coming year and beyond, according to leading industry analysts. Although the rate of growth in ad spending is likely to slow somewhat, newspaper ad dollars in 2001 are expected to surge from 5 percent to 7 percent, spurred by the strong economy and the overwhelming strength of national advertising.

Veronis Suhler paints the most hopeful picture, figuring on a 7 percent jump, to $60 billion, in total newspaper ad expenditures next year, compared with an estimated 7.4 percent gain, to $56 billion, in 2000. The firm predicts "steady growth" for the medium through 2004. Newspaper-circulation revenue is forecast to improve 2.6 percent next year, up from 1.4 percent this year.

Newspapers' top-dog status ends in 2001, however. The medium will slip to second largest in terms of advertising and consumer spending, Veronis Suhler predicts, with newspapers taking in $71.3 billion ($64 billion for the dailies, $7 billion for weeklies). The entertainment segment, encompassing films and recorded music, is forecast to gross an estimated $71.8 billion; and in the next five years, cable and satellite TV is expected to surpass both entertainment and newspapers.

Both Paine Webber and Zenith Media expect newspaper ad spending to jump 5 percent in 2001. The categories to watch next year include healthcare, telecommunications, financial services and computer/Internet, says Paine Webber publishing/broadcast analyst Lee Westerfield.

With the proliferation of the Internet, shrinking circulation and the closure of so many metro dailies, it's no wonder that newspapers have been viewed as a medium in decline. But the old-fashioned print product continues to get a second look from advertisers, especially major national ad clients looking for mass reach as the TV audience keeps fragmenting. The circulation picture is also rosier—while daily circulation has trended downward for years, last spring newspapers actually recorded a modest 0.2 percent gain in total weekday sales compared with a year earlier, according to the Newspaper Association of America. (The industry still struggles to attract Sunday readers, with circ on Sundays dipping 0.6 percent.) Veronis Suhler predicts that circulation growth is likely to continue, due to an aging population (an estimated 71 percent of those over the age of 35 read newspapers), increased publisher promotions and stable pricing at the newsstand.

"The circulation declines seem to have leveled off," says Jim Rutherfurd, executive vice president in charge of investment banking for Veronis Suhler. "There's been a restructuring of the industry, the demographics are favorable, and newspaper publishers have done a lot to continue to improve the product in terms of color, more pictures, shorter stories, and the creation of more and more sections that are relevant to readers. With as much as is being invested into the product, things are turning around."

Rutherfurd singles out the phenomenal growth of national advertising, which previously was "only a dream for the industry, rather than a reality." While retail and classified remain the medium's biggest sources of ad revenue, national continues to be the fastest-growing sector, gaining ground at an unprecedented pace. The aggressive sales efforts of individual papers, coupled with industrywide initiatives—most significantly the NAA-backed Newspaper National Network, which sells advertising in dailies nationwide—have brought such coveted advertisers as Procter & Gamble and Johnson & Johnson into a medium they once blatantly shunned in favor of television and consumer magazines. In the first quarter of this year alone, newspaper national advertising soared 18.7 percent over the comparable period last year, to $1.8 billion, the largest quarterly percentage gain since 1983, the NAA reports.

The country's largest newspaper publishers—including

NEWSPAPERS SPENDING

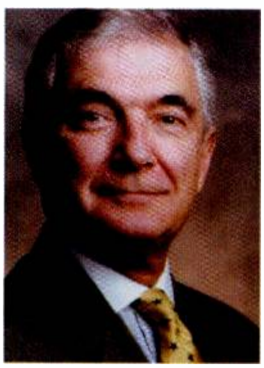
'93	'94	'95	'96	'97	'98	'99
$35.5	$38.1	$40.3	$42.6	$46.3	$49.3	$52.2

2000 SPENDING: $56.1 2001 SPENDING FORECAST: Veronis +7% Zenith +5%

All numbers in billions Source: Veronis Suhler, except 2001 forecast: Zenith Media Services

Gannett, Knight Ridder and Tribune—reported double-digit growth in national advertising last year, and industry watchers expect national to stay ahead of the pack. "There is little doubt that national advertising will continue to be the fastest-growing advertising segment for newspapers" over the next five years, Veronis Suhler reports. *The New York Times* alone has achieved a whopping 16.7 percent gain in ad-revenue growth so far this year, led by impressive growth in national ad business.

Growth of this magnitude, however, is not likely to continue, and the national segment is expected to soften somewhat in the coming year. Miles Groves, senior vice president/chief economist for the Barry Group, a newspaper adviser whose clients include the *Washington Post*, *Seattle Times* and *Arizona Republic*, forecasts that in 2001 national ad spending in newspapers will slow to a 10.8 percent growth rate, down considerably from this year's 15.1 percent. Groves predicts that total newspaper ad spending will jump 5.8 percent next year, down from a 6.3 percent rate of growth this year.



The Newspaper National Network is seeing results thus far in 2000 that are some 50 percent ahead of last year, according to president and general manager Nicholas Cannistraro. The packaged-goods segment alone is generating an additional 40 percent in revenues for the organization. In the coming year, Cannistraro predicts, pharmaceuticals will be an especially dependable category. "If we have any strength, it's in reaching the mature adult audience, and that's where most of the medicine is used," he says.

Pharmaceuticals will be strong, says Nicholas Cannistraro. "If we have any strength, it's in reaching the mature-adult audience."

Computers will also bring more money into the industry, with such names as Dell and Gateway using newspapers to sell their wares. But Internet-related advertising, while "here to stay," probably will see some falloff, Cannistraro says. "Some of the biggest [Web businesses], like Amazon.com, are still not making any money. At some point they're going to have to cut their spending back to try to make a profit."

Higher interest rates and diminishing sales likely will lead the national automotive segment to "flatten out," Cannistraro says. Automotive could be hit even harder as car manufacturers turn to the Internet to push product. The Ford Motor Co. has been using the Web quietly for the last couple of years and recently said it will use the Internet more aggressively. "An awful lot of newspaper income comes from the dealer associations and dealers themselves," Cannistraro says. "When that dries up . . . it's going to change everything, I think."

The retail segment also looks to grow at a slower pace in 2001. Groves forecasts retail growth decreasing to 2.2 percent next year, from 3.5 percent this year. General merchandise—encompassing department, discount and specialty stores —continues to generate the most retail dollars, Veronis Suhler reports. The fastest-growing retail segments include financial and computers/electronics, both witnessing double-digit increases. Food and automotive retail are suffering declines.

The biggest threat facing daily newspapers on the retail front, Groves says, continues to be the shift from run-of-press (ROP) advertising to preprints. "Newspapers need to do a better job of selling the combination of ROP display ads, which can help grow a customer base for an advertiser, with inserts," the consultant says. The dailies are losing ad business to less-expensive vehicles that are promising more-targeted reach, such as suburban weeklies, Groves says.

Meanwhile, the classified-ad boom should continue apace in 2001, improving 7.8 percent, up from 6.2 percent this year, according to Groves' estimates. Veronis Suhler reports that Web sites such as Monster.com have siphoned some of print's classified-ad business. But the firm predicts a "bounce-back" in the coming years as the low unemployment rate forces businesses to recruit labor through all available channels. Although newspapers have benefited from the explosion in Web-related advertising, they continue to see little fruit from their own online ventures, according to Veronis Suhler. But the Internet's impact on the newspaper business will continue to be "slight" in the short term, the firm says.

As Veronis Suhler points out in its forecast, the industry has "defied the skeptics who have been proclaiming the demise of this print format since the dawn of the Internet age." ■

Tony Case covers the newspaper industry from Mediaweek's *New York headquarters.*

RADIO

Dialing for Dollars

Advertisers keep flocking to radio, driving demand to new heights

BY KATY BACHMAN

Advertisers will face a much more stable radio marketplace in 2001. For the first time since the Telecommunications Act of 1996, radio ownership should be much less of a moving target in 2001, now that Clear Channel has completed its $23.5 billion acquisition of AMFM. By far the biggest radio merger to date, the deal resolved the fate of hundreds of radio stations in as many as 100 radio markets.

Though there are fewer players in the radio biz, those players are also stronger and more professional, and they've learned to capitalize on well-positioned radio clusters. So while the pace of consolidation has slowed, it has enabled radio to better position itself compared with other media. Coupled with a strong economy, the demand for radio advertising remains strong going into 2001.

Radio Advertising Bureau president Gary Fries is forecasting that radio advertising will rise 15 percent in 2000, surpassing the previous year's 14.6 percent increase. "After 20 percent monthly growth early in 2000, the business is stabilizing, settling in at 13 to 15 percent," says Fries, who is forecasting a more-modest gain of 13 percent for 2001. Others, such as Standard & Poor's media analyst William Donald, are more bullish. Donald sees radio ending the year up 20 percent, to $21.22 billion, with 2001 coming in at $24.19 billion, up 14 percent.

Except for cable, no other medium has grown more in recent years. "The business has climbed to a new level," declares Jeff Smulyan, CEO of Emmis Communications. "It's a better business than it's been in a long time. Radio is outpacing other media because more advertisers are using it as a primary medium. It's clearly a medium on the rise."

A holy grail for years, the radio industry is finally getting a bigger piece of the advertising pie. Veronis Suhler, which is projecting a 9.4 percent increase in radio advertising for 2001, notes that since 1994, radio's share of local advertising has grown by 3.7 percent to 21.6 percent last year. The increase is an indication, says Veronis, that advertisers believe in radio's ability to reach niche audiences. Combined with national spot, radio grabbed 19.3 percent share of the advertising market, up from 16.0 percent in 1994.

"A wide arc of advertisers are contributing to radio's growth," says Lee Westerfield, an analyst with PaineWebber, who is forecasting a 10 percent hike for radio. Beverages, especially beer, and automotive have been big contributors, he adds. Categories including movies, credit cards and financial services, healthcare and retail are expected to continue to pump dollars into the medium.

Telecom is looking particularly strong. Companies pushing a variety of services, from cell phones to wireless Internet and broadband services, are expected to be big advertisers on radio going into 2001, predicts Bishop Cheen, a media analyst with First Union Securities. "There's a whole new wave of telecom products that will turn to radio because it's priced right and there is tremendous reach," he says.

Contrary to many reports, radio's growth has not been driven solely by the dot-com category, despite the fact that dot-com allocated nearly half of its dollars to radio last year. Fries estimates that dot-com companies contributed only a percentage point or two to radio's total growth, most of it concentrated in the top 30 markets, such as New York, San Francisco and Seattle. "It won't be as strong in 2001 as the opening bell was, but it will grow, and radio will be a significant recipient of it," Fries notes.

Dot-coms did, however, increase demand for radio since flooding the market in third quarter '99, wreaking havoc on ad rates well into 2000. In San Francisco, many buyers complained that ad rates were approaching TV rates. Now that the dot-com frenzy has settled, advertisers may be able to breathe a sigh of relief next year.

RADIO SPENDING

'90	'91	'92	'93	'94	'95	'96	'97	'98	'99
$8.7	$8.4	$8.6	$9.4	$10.5	$11.3	$12.2	$13.4	$15.0	$16.9

2000 SPENDING: $19.0   2001 SPENDING FORECAST: Veronis +9.4% Zenith +12%

All numbers in billions Source: Veronis Suhler, except 2001 forecast: Zenith Media Services

"We were paying the price for the dot-com surge, which distorted the ad rates for the first six months of the year, but now things are slowing down," notes Pete Stassi, senior vice president and director of local broadcast for BBDO. "The radio industry is acting more positively to regular advertisers rather than pushing them aside in favor of dot-coms."

Radio operators have become a lot more savvy about managing their inventory, using yield-management systems that set rates for dayparts and demographics based on demand. "When you start reaching sell-out percentages in the high 90s and 80s, you have to maximize every piece of inventory you have," notes Fries. So advertisers can expect to pay the highest rates for popular dayparts, such as morning and afternoon drive times, or for hard-to-reach demographics.

That doesn't mean rates won't increase in 2001; they will. But chances are rates will go up a more modest 10 percent rather than the 15 to 30 percent increases, sometimes 35 to 40 percent, that advertisers have paid this year.

Pigeonholed in the past as solely a local medium, radio is seeing national and network sales keeping pace with local. Network radio will see its first $1 billion year in 2000. National spot, which has scored double-digit increases throughout the year, has been buoyed by savvy radio owners, who have clustered stations together, offering attractive regional buys. "Advertisers are seeing the impact of a regional buy—why go into a market and cherry-pick when you can just make one phone call?" says Joan Gerberding, president of Nassau Broadcasting Partners.

Network radio has been on a roll since AMFM launched its top-market networks two years ago. Many radio networks followed suit, with a steady stream of new RADAR-rated networks in 2000. "Most of the growth has come from increased spending on the part of existing advertisers," says David Kantor, president of AMFM Radio Networks, which will merge into Premiere Radio Networks next year. "There's been little or no attrition, so that keeps demand strong."

Procter & Gamble is a prime example. The Cincinnati-based consumer-products giant has increased the number of brands it advertises on network radio and has committed more money to the medium for next year.

But rates will go up, because with the merger, Premiere will be offering slightly less inventory. "Pricing will be healthy," Kantor says. "While the increases won't be as torrid as previous years, there will still be double-digit growth."

Along with the increased demand for radio has come increased commercial clutter, a thorn in the side of any media buyer's plan. That, too, has settled down as more groups, such as Emmis, Cox Radio, and Citadel, have backed off, carefully balancing programming with commercials. Premiere Radio Networks will attack clutter with new commercial lengths next year of 45 and 90 seconds.

"We know the number of commercial minutes are up one to two minutes per hour. [The new spot lengths] will allow us to reduce the number of commercials per hour. People hear commercials but not the duration of time," says Kraig Kitchin, president of Premiere Radio Networks.

While the prospects for 2001 are good, it could be the calm before the storm. Radio, particularly network radio, may be on the verge of facing new competition from satellite radio, much the same way broadcast TV found itself in a fierce fight for viewers with cable TV.

Two companies, Washington-based XM Satellite Radio and New York-based Sirius Satellite Radio, will be marketing subscription-based, 100-channel digital radio in 2001. Both services plan to offer some advertising on selected channels, but few believe it will have much impact next year on radio's listeners or compete for many of its ad dollars.

Internet radio is another question mark. Hundreds of Internet-only radio stations have launched finely niched channels on the Web in the last few years. Most offer advertising. Today their audiences are only a small fraction of a local radio station's, but that could change when the quality of the audio improves and broadband becomes more prevalent. Broadcasters are banking on the fact that they know more about programming audio than any other Internet-only player, but many have hedged their bets by either streaming their signals on the Web or launching "side stations" in order to give their loyal listeners more of what they want. ■

"When you reach sell-out percentages in the high 90s and 80s, you have to maximize every piece of inventory you have." —Gary Fries

Katy Bachman covers the radio industry for Mediaweek. *She's based in suburban Washington, D.C.*

Banner Years Ahead

Never mind the shakeout, the Web is becoming ever more indispensible to advertisers

BY ANN M. MACK

WALLPAPERING THE WEB Banner ads will remain the de-facto ad unit online, though they will evolve into more dynamic marketing tools.

Despite a roller-coaster year for dot-coms, online ad spending is expected to continue to flourish in 2001.

"We hit a hiccup in April," says Jason Heller, CEO of New York-based media-buying and -planning firm Mass Transit, referring to the dot-com market correction. "Anyone in the industry who says they weren't affected is lying. We were all affected. We hit a bump in the road and nothing else. Natural selection has to happen sometimes. We are a healthy industry that's moving forward fast."

Analysts' predictions reflect this momentum. Cambridge, Mass.-based Forrester Research expects U.S. online ad spending to reach $8.7 billion in 2001, up 61 percent from this year. New York-based Jupiter Communications forecasts $7.3 billion for next year vs. $5.3 billion in 2000.

As the online population completes its shift from a male-dominated, early-adopter world to one that mirrors the offline universe, more and more marketers will embrace the Web as a means of reaching their audience. For the first time ever, in 2000 the number of women online has surpassed that of men, according to a study conducted by Media Metrix. The Internet measurement service also found that the number of Web users with annual household incomes under $25,000 has grown by nearly 50 percent. Forrester reports that the U.S. online audience will grow to 60 million households by 2003.

With the changing online demographic, "advertisers will expand their budgets," explains Peter Petrusky, director of new media for PricewaterhouseCoopers, New York. "Advertisers will be willing to spend as the medium reaches critical mass."

According to a Jupiter survey, marketers plan to increase Internet ad spending at a higher rate than for any other medium. About 73 percent of advertisers said they would increase their online ad spending in the next 12 months, in contrast to the 43 percent who said they would increase their magazine spending and the 37 percent who planned to increase their cable-TV budgets. This expected boom, Jupiter predicts, will propel the Internet to fourth place as an advertising medium—behind broadcast TV, radio and newspapers—representing almost 8 percent of the total U.S. advertising market by 2005.

Forrester's estimates are even more optimistic. The research firm expects online ad spending to reach the 8 percent mark a year earlier, hitting $22 billion by 2004.

The challenge with advertising growth of this magnitude: grabbing consumers' attention. There will be an explosion in clutter, says Marissa Gluck, a Jupiter analyst. The company forecasts that by 2005, a consumer will receive in excess of 950 Internet-based marketing messages per day, more than double the 440 impressions that a Web user saw in 1999. "Consumers are inundated with advertising, online and offline—on TV, in print, on billboards, in e-mail boxes," Gluck says. "They are completely overwhelmed. How do you overcome consumers' resistance to advertising?" Rather than relying on the banner, Gluck suggests that, to funnel out noise on the Net, advertisers adopt ad forms such as rich media, viral marketing, e-mail and sponsorship or affiliate programs.

Although advertisers, media buyers and Web publishers express excitement about alternative online ad units, most agree that the banner will remain the de-facto standard in 2001. Contrary to pointed arguments that the banner is dead, owing to abysmal click-through rates, the beleaguered ad unit continues to outrank other forms of advertising on the Net—a sign that it is very much alive.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INTERACTIVE SPENDING

'95	'96	'97	'98	'99
$.05	$.2	$.9	$1.9	$4.6

2000 SPENDING: $7.7 2001 SPENDING FORECAST: Veronis +45.3% Zenith +33%

All numbers in billions Source: Veronis Suhler, except 2001 forecast: Zenith Media Services

Indeed, the Internet Advertising Bureau (IAB) reckons that banners account for 52 percent of online units. "It is the digital equivalent of the 30-second spot," explains Scott Witt, supervisor of the media-buying unit at interactive agency Organic, New York. Yet the banner will not survive in its current form, evolving from static, perfunctory real estate into a dynamic, utility-driven tool. "What you're going to see changed is what [advertisers] are doing with the banner," Witt says. "The banner is sort of glossed over now."

Beyond the banner, sponsorships make up 27 percent of advertising on the Web, the IAB reports. Interstitials—full pages that display while a Web page loads—capture 3 percent, as does e-mail marketing. As businesses begin to see e-mail as the silver bullet for acquisition and retention challenges, Jupiter predicts that dollar allocation to this market will increase substantially. Jupiter estimates that commercial e-mail spending will grow from $164 million in 1999 to $7.3 billion in 2005.

"There will be an increase in interest and spending for e-mail," says Gluck. "It's inexpensive, and there are high response rates."

Marketers and analysts also anticipate a rise in experimentation with rich media, Web ads that use a combination of audio, video and animation. Although this format currently makes up only 2 percent of online ad budgets, advertisers hope to take advantage of rich media as bandwidth limitations decrease and technology progresses. But, cautions Serge Del Grosso, media director for Organic, the message must be first and foremost. He cautions against using glitz just to induce the gee-whiz effect:

"We're increasingly pressed to develop 'wow'-type advertising to engage the customer. There are developmental and technological costs involved. Do the response rates justify the investment?"

Gluck agrees, saying advertisers have to be careful where they put rich media. "Consumers are goal oriented," she explains. "They are utility driven, not entertainment driven." She suggests placing rich media on leisure-oriented sites rather than in content-heavy areas.

Despite a burgeoning field of online players, analysts predict that advertisers will continue to buy ad space mostly on the top 50 sites. According to Jupiter, some 70 percent of Web ad spending goes to the top 15 sites. "There is a significant amount of concentration in this business," explains Petrusky. "The strongest brands will continue to stay on top as the number and types of advertisers expand."

The count may increase, but the landscape of companies pushing their products and services online will remain fairly stable. Jupiter predicts that financial services will stay at the top, accounting for $1.3 billion in online advertising in 2001, up from $1.1 billion. Media and computer hardware and software companies will follow, each allocating $900 million to online efforts. The telecommunications, travel, automotive and health industries fall behind those two categories. Compared with their significant expenditures in traditional media, consumer packaged-goods companies' online ad spending will represent only a small slice of the Internet ad world. They are expected to dish out only $200 million next year.

In terms of payment, the hybrid model, a combination of CPM and CPA (cost per action), will emerge once again as the norm in 2001. According to the IAB, hybrid deals account for 48 percent of the market. CPMs or impression-based deals comprise 42 percent and performance-based deals 10 percent. Forrester expects performance-based deals to make up 50 percent of online ad budgets by 2003.

Integration of the Internet and traditional ad efforts will be a key to success, analysts emphasize. Rather than perceiving online advertising as separate from offline, marketers should meld the two to create a synergistic, consistent message and brand image across media. "The Internet is not a replacement medium," says Petrusky. "Advertisers instead will use it as a complementary integration tool." ■

Ann M. Mack covers technology issues for IQ News, *a supplement to Adweek Magazines. She's based in New York.*

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SYNDICATION

Still Must-See TV

Off-net shows are a bright spot in the syndication market

BY DANIEL FRANKEL

A DYING BREED
Talk shows like the new *Dr. Laura* are on the wane, with court strips filling daytime instead.

In the world of syndication, off-network programming still rules. Such top-shelf sitcom fare as *Friends* and *Seinfeld* fetched double-digit CPM increases during last spring's upfront market. But it remains to be seen whether the overall syndication market will sustain its growth in the wake of a very weak third-quarter scatter market, declining overall ratings and buyers' lack of enthusiasm for new syndicated programming.

The Syndicated Network Television Association projects year-to-year revenue growth of 15 percent to 17 percent among the top 200 advertisers this year. Meanwhile, Veronis Suhler estimates that this year's overall market will jump to $2.4 billion, up from $2.3 billion in 1999. According to the Veronis projections, the syndication marketplace will see a steady 4.2 percent growth rate in 2001.

Most CPM increases will be in the single-digit range next year, says independent media consultant Jerry Solomon. "I don't think next year's marketplace will be anywhere near as strong as this year's has been," he says. "I doubt you'll see the kind of 10 to 15 percent CPM increases we had this year. But then again, [the market] doesn't have to be as strong. It can take a smaller increase—or even be flat—and it'll still do well."

The demand for off-net shows is one of the main reasons why syndication's 2000 upfront market increased 9 percent over 1998, to $2.4 billion, according to the SNTA."Off-network programming has been very influential [in terms of the market's growth]," says Allison Bodenmann, SNTA president. "It has been what's driven the adult-brand dollars into syndication the last five years."

The inclusion of barter-advertising-rich off-net programming has given the syndication business access to network prime-time buyers, many of which hope to reach network-prime audiences without having to pay network-prime dollars. In fact, according to Competitive Media Reporting, among syndication's top 20 ad-revenue-earning shows this season, 10 are off-network. (*Friends* ranked highest, taking in $181 million.)

In 1995 there were five or six off-net shows in syndication, and next year there will be 33, says Bodenmann. The increase, she says, is opening up opportunities to get advertisers who wouldn't otherwise be interested in syndication. "Advertisers like off-net shows, because they know what they're about, and they don't have to worry about the environment," she says. "And there are advertisers who say, 'I can no longer afford to buy premium shows on the networks, so I'm going to buy them in syndication.'"

And certain shows, Bodenmann says, such as *The X-Files,* "do higher numbers than their network counterparts in some cases."

Adds Dan Arzewski, vice president of national broadcast for Creative Media: "Syndication is definitely an alternative to prime time now. I think [advertisers] are really, really familiar with broadcast prime time. And clients who aren't that savvy don't really know where that *Seinfeld* episode they're watching in prime access is coming from."

But, at least on its leading edge, off-net's ratings are declining. Former NBC powerhouses *Friends*, *Seinfeld* and *Frasier*—still the top-rated off-net sitcoms, even though all three have been in syndication for several years—have seen their national ratings drop this season. In fact, Columbia-TriStar's *Seinfeld*, which garnered network-prime-like ratings during its first couple of years in syndication, now consistently scores below-5 national ratings. Of course, this kind of erosion is to be expected with repeat broadcasts, and the fact that all three shows still rank among syndication's top 10 is a testament to their quality.

The problem, according to Horizon Media's Brad Adgate, is that there doesn't appear to be a new off-net entry on the horizon ready to deliver the kinds of national ratings—above 10, in some cases—that shows such as *Friends*, *Seinfeld* and *Home Improvement* earned in their early syndication cycles. In fact, Adgate says, national ratings in the 3 to 4 range—such as those obtained by class-of-'99 off-net entries *3rd Rock From the Sun* and *The Drew Carey Show*—are all that reasonably can be expected of 2000's entries, such as Paramount Domestic Television's *Spin City*.

Meanwhile, among first-run programming, the proliferation of reality court strips in daytime has increased ratings as the format staple, talk, has faltered. Says Bodenmann: "The needs of the stations are driven by

SYNDICATION SPENDING

'90	'91	'92	'93	'94	'95	'96	'97	'98	'99
$1.1	$1.3	$1.4	$1.6	$1.7	$1.9	$2.0	$2.2	$2.2	$2.3

2000 SPENDING: $2.4 2001 SPENDING FORECAST: Veronis +4.2% Zenith +6%

All numbers in billions Source: Veronis Suhler, except 2001 forecast: Zenith Media Services

ratings success, and one of the reasons why there are so many court shows is because two stations in a market will have them, and a third station will start getting killed. It then says to itself, 'You know, what we need is a court show.'"

According to Starcom Entertaiment's *Insider's Guide*, the number of daytime viewers watching syndicated programming has surpassed the number of viewers watching daytime television on the three major networks.

Advertiser interest in the courts strips, however, seems lukewarm. Despite the fact that several court shows rank near the top in national ratings, they're not among the highest ad-revenue earners. "Shows like *Judge Judy* produce good ratings," says one buyer, "but most of these courtroom environments look thrown together, and you're not sure how much [production] money is behind them. They produce a less positive environment for advertisers than, say, an *Entertainment Tonight*."

According to Creative Media's Arzewski, the sheer number of available ratings points among court shows keeps demand down—and CPM increases in the single-digit range.

On the opposite end of the spectrum, CPM increases have been much higher for weekly, half-hour home-improvement programs. National ratings for these niche-targeted shows are often below a 1, but they're in high demand among upscale brands. "These shows sell out really quickly, all on their own," says Bodenmann. "If there were more of them, it would benefit advertisers, but there isn't a lot of station demand for them." ■

Daniel Frankel covers the syndication business from Mediaweek's *Los Angeles bureau.*

Nowhere to Hide

Advertisers are going to even greater lengths to reach potential customers

BY ANNE TORPEY-KEMPH

HITTING THE JACKPOT Spending on billboards and other out-of-home spaces is skyrocketing, even as inventory increases.

Parking meters. Bathroom walls. Airplanes' overhead storage bins. No surface is safe in the new out-of-home environment. Maverick marketers seeking stand-out impact may be pushing the envelope of consumer tolerance with unorthodox placements, but you gotta love that out-of-the-box thinking.

"[Out-of-home] is metastasizing. It's all over the place. There's a buyer for just about every kind of outdoor option," says Pete Riordan, vice president at New York agency BBDO, who buys outdoor for clients including GE, HBO, Lenscrafters, Visa and M&M-Mars.

Sure, billboards are still the mainstay of the business, but the growth in alternative outdoor is remarkable, with loads of smaller companies jumping in with ever-more off-beat options. Riordan calls New York "the wild, wild West" for alternative out-of-home. "There are very few restrictions, and there's a lot of cowboys out there."

The number of businesses offering alternative, one-off, custom solutions is growing at a rapid pace, says Diane Cimine, vice president, Outdoor Advertising Association of America. "We've been getting about a dozen calls a month from such companies wanting to join the OAAA," she says. The myriad options and creative possibilities are what's driving the medium's growth, she contends.

According to Veronis Suhler's latest Communications Industry Forecast, outdoor spending rose 9.5 percent to $4.8 billion in 1999, compared with a 9.0 percent increase in 1998. Growth has been on the rise since 1996, when it was 7.4 percent. Leading the field are Infinity Outdoor (TDI), Eller Media and Lamar Advertising. And BBDO's Riordan says one to watch in the coming months is the French company J.C. Decaux, the fifth-ranked outdoor player. The company commandeered the street-furniture businesses in New York and San Francisco, Riordan notes, and is now shooting for significant placements in shopping malls.

The top three outdoor categories in 1999 were local services and amusements, with $533.8 million, up 13.3 percent from 1998; retail, with $521.7 million, up 28.3 percent; and public transportation, hotels and resorts, with $438.2 million, up .2 percent.

Out-of-home is expected to grow 10.4 percent in 2000 to $5.3 billion, and it is projected to grow at a compound rate of 9.6 percent from 1999-2004, reaching $7.6 billion in 2004.

Like other media, outdoor is enjoying the freer-spending habits produced by a robust economy. And while other media have felt a dot-com drop-off in their pocketbooks, outdoor companies report fairly steady dot-com business—bad news for BBDO's Riordan, who says he's rooting for the dot-coms to die out, which would reduce demand and bring rates down. (Last year's Great Billboard Rush by the dot-coms drove rates through the roof.)

"I don't see dot-com going away," says Randy Swain, president of Seattle-based AK Media, which controls 6,800

faces in the Northwest and Northeast, and recently captured Verizon's business. "National has scaled back a bit, but there's tons of smaller local players looking for exposure."

In Times Square, dot-com is still very healthy, says Brian Turner, president of Sherwood Outdoor, citing new contracts with angryman.com and onmoney.com. "We haven't experienced a drop-off in that category."

Carl Eller, chairman/CEO of Eller Media, the No. 2-ranked outdoor player, says his dot-com business has remained steady compared with last year, representing about a 5 percent to 6 percent share of Eller's total revenue. But he attributes the "pretty significant" revenue boost his company saw in first-half 2000 to greater interest in outdoor overall. "Procter & Gamble, for example, is spending dramatically in outdoor due to a change in [media planning] philosophy," asserts Eller. He also notes that auto makers Ford, GM and Chrysler have "dramatically" boosted their spending with Eller so far this year. BBDO's Riordan, too, says he expects the medium to keep getting hotter and that next year the agency will have more, different accounts that use the medium more heavily. "As broadcast fragmentation continues, out-of-home still can deliver huge tonnage," he says.

But how do you prove it? That's always been a sticking point with outdoor—that elusive accountability.

It's high on the industry's to-do list this year. To wit, the OAAA recently conducted a series of eye-tracking studies to measure what is seen and recalled, and it has put considerable resources online to support use of the medium. As part of its "Millennium Plan," a set of initiatives developed late last year from an industry assessment by consultant Erwin Ephron, the OAAA has created an online creative library, demographic maps, optimizers and buyers guides complete with rates.

"This might not seem like big news, but for this industry it's major," says OAAA's Cimine.

Other OAAA initiatives aimed at aligning outdoor with other media include collaboration with Scarborough and Arbitron to develop a ratings system for better audience measurement, and work with the Advertising Agency Association of America to set up standards and practices. SRDS, Cimine adds, is establishing an online buyers guide to include who's who in each market, rates, etc.

On the alternative front, Chip Fisher, president of New York–based Park Place Media, in June established the Alternative Media Council under the OAAA umbrella. Fisher is planning roundtables and powwows to promote interaction among the alternative players. His top priority is to launch an indexing Web site (alt.media.com, targeted to be up by November), where "even the most junior media planner can see all the concepts, search by market or by company, get media kits, get in touch with the right people fast."

Eller Media, too, is capitalizing on the Internet to serve clients' needs and address the matter of accountability. "The Internet allows us to digitally do proof-of-performance for advertisers much faster," explains Carl Eller. Similarly, AK Media delivers completion reports and proof-of-performance reports digitally. "Clients get what they need quicker, and we get paid faster,'" says AK president Swain.

Technical developments offline are big news in outdoor too. For the industry's core billboard business, improvements in facing materials, like Flex-face vinyl, enable quick changes in marketers' messages. Improved digital printing processes, with four- and six-color graphics, are making images sharper and clearer, to show more detail from a distance. Several companies are developing innovative ways to use LED light panels. Earlier this month, Infinity Broadcasting's outdoor unit, TDI, unveiled 75 illuminated bus panels that by day appear as standard bus-exterior posters and light up at night via LED panels powered by the bus itself. BBDO's Riordan mentions a similar technique being developed by Yesco, whereby LEDs are spaced out across a billboard to create one image by day and another, illuminated one by night. "It's possible you'll see one of these on the Condé Nast building in New York's Times Square," he hints.

AK Media, which also holds broadcast properties, is working on a way to deliver displays digitally from a central hub—"to create a digital billboard network, if you will, like in broadcast," says Swain. Stay tuned.

With all these tech enhancements and efforts to get in step with other media, out-of-home just keeps on truckin', further distancing itself from its image as the "booze, butts and bikinis" medium. ■

Anne Torpey-Kemph is Mediaweek's *copy chief and departments editor. She's based in New York.*

OUTOFHOME SPENDING

'95	'96	'97	'98	'99
$3.3	$3.6	$3.8	$4.0	$4.6

2000 SPENDING: $.5.3   2001 SPENDING FORECAST: Veronis +10.4% Zenith +13%

All numbers in billions   Source: Veronis Suhler, except 2001 forecast: Zenith Media Services

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Trading Up

A better-than-expected year for b-to-b bodes well for future growth

BY KEN LIEBESKIND

A growth in certain business-to-business magazine categories and a rise in trade-magazine readership have helped to improve b-to-b ad revenue this year, with further increases predicted for 2001 and beyond. The good news is also due in part to business-magazine Web sites, which are serving as a key new source of ad revenue.

With ad pages up 6 percent, to $440 million, and revenues up 13 percent, to $5.7 billion, through the first six months of 2000, the full year's growth will be "better than anticipated," says Gordon T. Hughes, president and CEO of American Business Media. "The upswing can be attributed to expenditures in a broader base of magazines than in past years and a tie-in to the recent figures that show b-to-b readership up a whopping 42 percent over last year."

Overall, Veronis Suhler predicts 6.4 percent annual growth in ad spending from 1999 to 2004 for all trade magazines, with spending reaching $17.1 billion by 2004. Continued growth will be based on a strong economy and the ability of publishers to "compete with or incorporate Internet competitors into their core businesses and revenue streams."

The fastest-growing categories are technology, finance and telecommunications, with some improvement in agriculture, Hughes notes. Medical magazines are also doing well, due to the large number of new drugs that are coming out.

"Being Internet-related means there's a buzz surrounding it," says Nicole Fadner Friese, ad director at *Media*, an Internet-advertising monthly launched by MediaPost Communications in June. "We've had a lot of great support from companies like Doubleclick and Engage Technologies [the online ad networks], with traditional media companies coming on board to make the jump to the Net."

The technology category led the way for trades last year with $3.6 billion in spending, up 9.3 percent, according to the Veronis Suhler Communications Industry Forecast. But a softening of the category has been reported as major advertisers, including IBM and Dell, sell directly to consumers and move their advertising to consumer media.

The computer and software categories dipped 31 percent last year in ad pages and 12 percent in revenue, according to Hughes. The categories represented 40 percent of all b-to-b publishing ad spending in 1998 and 1999. The downturn will continue, with the computer and software categories "still in trouble," Hughes says.

Veronis Suhler predicts that the technology category will show a small gain of 3 percent through 2004. The growth will come from the development of cross-media packages that will satisfy techno-savvy advertisers.

Publishers are already incorporating the Internet into their revenue streams by selling ads on their Web sites. Online advertising "is part of the big picture" for trade magazines today, says Bill Furlong, president and CEO of B2B Works, a Chicago firm that places ads on trade-magazine Web sites. Companies now spend 2 percent to 5 percent of their ad budgets online, Furlong says—this may not sound like much, but they spent nothing three years ago, he explains.

Magazines originally gave away ads on their Web sites with multi-page buys, but now "publishers know the Web platform represents a huge revenue opportunity," Furlong says. There was a fear of Web advertising taking dollars away from print, but Furlong says, "new money" is coming in from advertisers who are "struggling to figure out how much to allocate online." But he also believes advertisers may begin to shift their dollars away from print, buying fewer magazines in a vertical market as they spend more online.

"Integrated media is the key trend in the b-to-b magazine industry," says Cam Bishop, president and CEO of Intertec, publisher of 100 business magazines, including *Catalog Age* and *Folio*. "We're pushed by advertisers who ask not just for print but for electronic. It's a total package." ■

Ken Liebeskind is a New York-based freelance writer.

TRADE MAGAZINES SPENDING

'95	'96	'97	'98	'99
$9.1	$10.1	$11.3	$11.6	$12.5

2000 SPENDING: $13.3   2001 SPENDING FORECAST: Veronis +6.9%

All numbers in billions Source: Veronis Suhler, except 2001


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"There's no such thing as 'virtual motherhood.'
If you're in it, you're on it, 24 hours a day, 7 days a week– at least in your heart. If ever I think I'm losing my balance between the me and the we, there's REDBOOK, like a good friend on the other end of my see-saw."
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MOVERS

CABLE TV

Nancy Jordan was named senior vp of MetroChannel ad sales at Rainbow Advertising Sales Corp., a division of Cablevision's Rainbow Media Holdings. The former marketing director at WABC-TV in New York, Jordan will spearhead business development strategy at the company, overseeing sales, promotion and research.

TV STATIONS

Peter Daniels has been named national sales manager for WNBC. Daniels had been an account executive for WNBC sales since 1998. Daniels came to WNBC from WNYW, where he was responsible for all sales coverage to major advertising agencies in the tri-state area. He has worked in various sales capacities since 1979. Daniels will continue to help manage traffic and sales service.

TELEVISION PRODUCTION

Buena Vista Television has announced a number of high-level promotions as part of its ongoing restructuring. **Holly Jacobs** has been named senior vp of programming and development for the newly formed Buena Vista Productions, overseeing all first-run development for syndication, cable and network. She moves over from vp/reality programming for ABC Daytime. **Karen Glass** has been appointed vp of development of Buena Vista Productions, reporting to Jacobs. She has served as executive producer for numerous reality, talk and variety specials. And **Mike Henry** has been promoted to vp of creative services for Buena Vista Television. He moves up from executive director of creative services...**Albert J. Kornak Jr.** has been promoted to corporate director of production for Pegasus Communications Corp. He was most recently production manager for WOLF-TV, Pegasus' Fox affiliate in Wilkes Barre-Scranton, Pa.

MAGAZINES

Peter Herbst, former editor of Time Inc.'s *Family Life*, will move to Paris to become editorial consultant for Hachette Filipacchi Medias. Herbst will consult on all (*continued on page 56*)

The Media Elite

Edited by Anne Torpey-Kemph

Playin' in the Band

Relations among ad, media and marketing execs aren't always harmonious, but now there's a new forum where they can all make beautiful music together.

The brainchild of Ira Berman, Millennium TV Sales & Marketing account exec and a former concert promoter/booking agent, the Media All-Stars launched recently as a bimonthly musical extravaganza with fare ranging from funk to country to soul to rock. Other core players include Bill Cowen, also of Millennium, on guitar; MediaVest's Peter Gusmano, on drums; and Young & Rubicam alum Jonathan Buckley, also on drums. For these industry vets and a growing group of after-hours musicians, the public peformances at clubs around New York are now a regular extracurricular activity.

The way his Media All-Stars event is growing, Millennium TV's Berman is anything but a one-man band.

"I created the Media All-Stars as a way for TV-industry people like myself to express a different creative side," says Berman, who put on the first event at the famed club Le Bar Bat. With five or six different bands and attendance growing to over 600 people per event, "we are beginning to attract names in the caliber of Anton Fig, the drummer of *Late Show With David Letterman*," Berman says.

Wannabes should visit Berman's Web site (at www.nycgig.com), sign up, and send a demo tape or press kit to the P.O. box listed there. The next Media All-Stars event is slated for Oct. 19 at Le Bar Bat. *—Marc Berman (no relation)*

Star Status for Nassau Exec

American Women in Radio and Television at its recent annual meeting in Los Angeles honored Joan Gerberding, president of Nassau Radio Network, the national sales division of Nassau Broadcasting, with its 2000 Star Award for her commitment to women's issues in broadcasting.

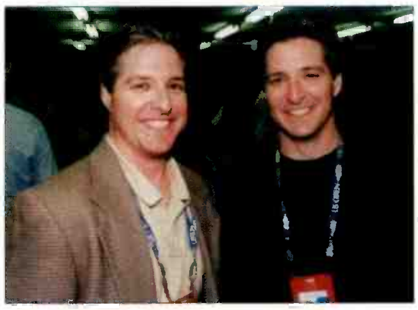
The 25-year radio-biz veteran says she has made women's causes a priority in her work life. "Ever since I started my career, I felt very strongly that there's a lot of talent in women that is sometimes overlooked," says Gerberding, who also serves as vice chairperson of the New Jersey Broadcasters' Association board of directors. Gerberding says she promotes her cause by trying to be a role model and by speaking to professional women's groups. *—Lori Lefevre*

At AWRT's recent awards gala, Gerberding (r.) with Erica Farber, CEO of *Radio & Records*

xpect

The Brothers Caraccioli

Since parting ways after their freshman year at Oswego State in upstate New York, identical twins Jerry and Tom Caraccioli have taken similar PR career paths, though miles apart. The brothers played a year of hockey together at Oswego State, then Jerry transferred to Cal State–Fullerton. "I had to get away and test my own wings," says Jerry, who has done publicity for CBS Sports for the past four years.


Jerry (right) is 12 minutes older than Tom.

After graduation, Jerry worked for the California Angels and the Oakland Athletics, while Tom, now in PR for USA Sports, represented the Boston Red Sox. And while Jerry lived and worked in Sydney as media director for the Australian Baseball League, Tom worked in the States as sports information director for Merrimack College near Boston.

The twins' paths crossed recently when CBS Sports and USA Network teamed up in the wee hours of Sept. 6 to broadcast the conclusion of a marathon five-set U.S. Open tennis match; the brothers even issued a joint press release on the coverage.

Though they now work for competing networks, Jerry says blood is thicker than business: "Having a brother as your counterpart facilitates solutions to any problems that might arise."—*John Consoli*

SPOTLIGHT ON...

Eric Schotz
CEO, LMNO Productions


Reality pioneer

With possible talent-guild strikes looming and television networks turning to reality programming, it reminds Eric Schotz of old times. Schotz started LMNO Productions 11 years ago during a television-writers strike, and he got through it by creating reality specials such as *Making of a Model* for the networks.

In fact, for a full decade before reality-format TV became a huge business, Los Angeles–based LMNO (which stands for Leave My Name Off) carved out a nice niche with it. "We've been constantly working," Schotz says. "With or without a strike, we've always had enough work."

Projects have run the gamut from the Bill Cosby–hosted *Kids Say the Darnedest Things* for CBS to the racy *Guinness Book of World Records: Prime Time* for Fox. In between, the company has done plenty of cable work, including *Behind Closed Doors With Joan Lunden*, a series of prime-time specials for A&E, and *New Attitudes* for Lifetime. "We spread ourselves among all the cable and broadcast networks," says Schotz. "We've never overcommitted to one single network."

With 160 employees, LMNO is now poised to ride the reality wave to expansion. The company also benefits from a good relationship with Britain's Granada Media, a creator of reality and game formats. Out of that relationship, LMNO is developing several projects for Fox, including the game show *Krypton Factor* and the special *Since I've Been Loving You*.

LMNO's pipeline is pretty full. Other ongoing projects include *Boot Camp*, a reality-game project for Fox that puts contestants through a series of grueling military-like exercises. Also in the works is an MTV pilot, *Mall Confessions*, as well as an eBay-branded variety-action strip that's being shopped to syndicators.

"Doing this for as long as we have," Schotz explains, "we've met a lot of interesting people, and we've found a lot of incredible stories." Maybe too many—LMNO is now investigating various *fiction* projects. —*Daniel Frankel*

MOVERS

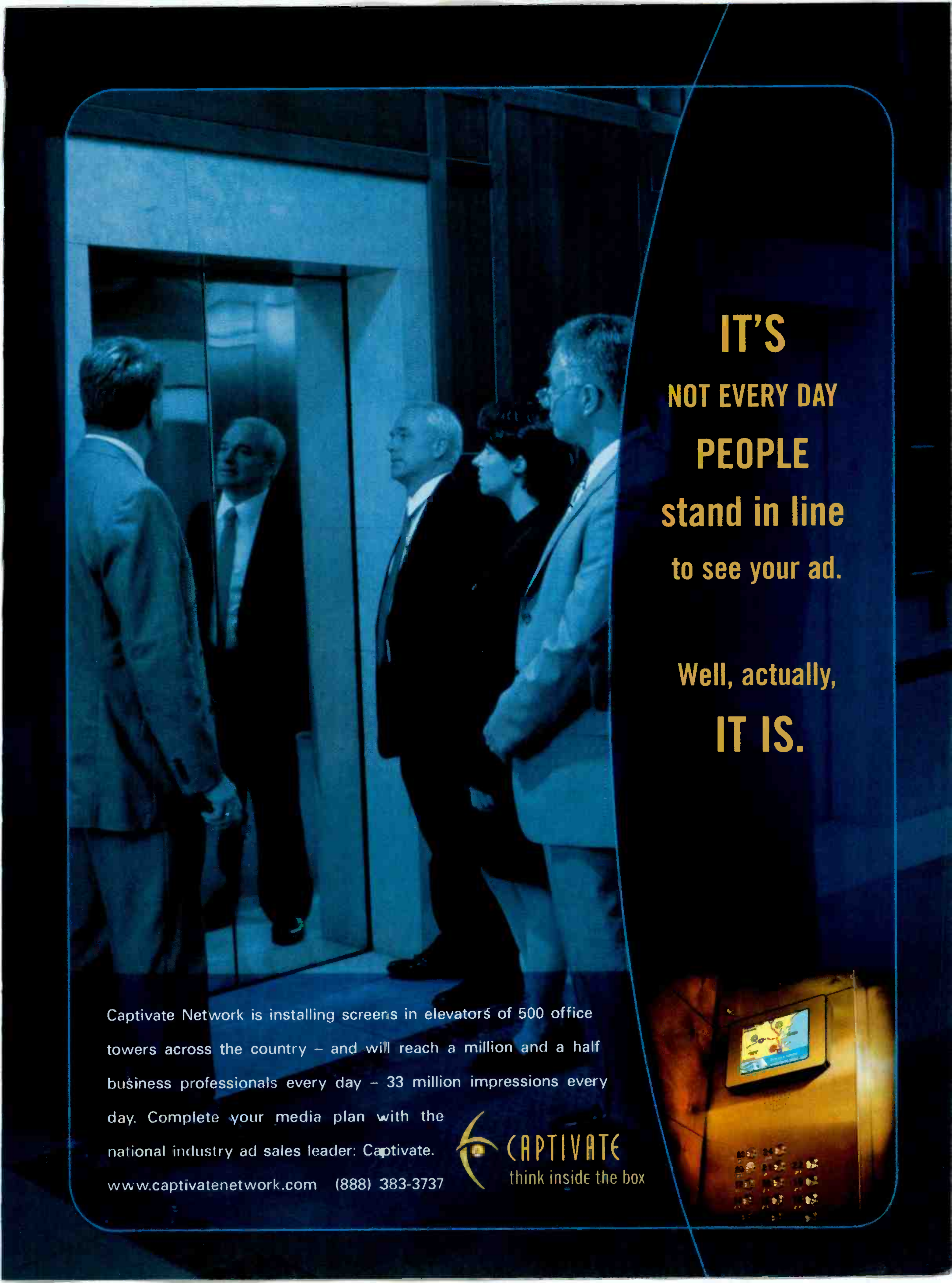
(continued from page 52) aspects of HFM's French operations and will report to Anne-Marie Couderc, executive vp/CEO of HFM...**Nancy Telliho**, New York sales manager for *Newsweek*, has moved over to sibling publication *Arthur Frommer's Budget Travel* as publisher...**Corky Pollan**, the "Best Bets" editor of Primedia's *New York* magazine, has been named style director for Condé Nast's *Gourmet*.

RADIO

Vernon S. Wright Jr. has been named senior vp of marketing and sales for American Urban Radio Networks. The longtime ad-industry exec was most recently vp/general manager at SFX Radio Networks. The appointment marks Wright's return to African American–owned AURN, which he helped create in the early 1990s...**Lance Panton** has been promoted to program director of WZAK-FM, Radio One's Urban Contemporary station in Cleveland. Panton will also continue in his current position as program director of WENZ-FM, Radio One's Young Urban Contemporary station in Cleveland...**Janice Giannini** was named executive vp and chief information officer for Arbitron, responsible for managing the company's information technology infrastructure. She comes to Arbitron from Lockheed Martin, where she was director of program planning, analysis and oversight...**Fred Fried** has been promoted to marketing division president for SFX Entertainment's Sports Group, from senior vp...**Ross Crystal** has been named executive producer of entertainment news for Westwood One. Crystal comes from Westwood's Metro Networks, where he was executive producer of entertainment news and syndicated programming...**Steve Winters** has been promoted to vp of marketing services for Westwood One's Metro Networks in Houston. He was national director of marketing for Metro Networks...**Fred Weber**, former CEO and co-owner of the Broadcast Group, has been named to the board of directors of WestStar TalkRadio Network...**Debbie Kwei** was named vp and general manager of Radio One's WCCJ-FM in Charlotte, N.C. Kwei was most recently general sales manager for Infinity's WPEG-FM, WGIV-AM and WBAV-FM in Charlotte... **Owen Weber** was named vp and general manager of Radio One's Cleveland cluster of radio stations, WENZ-FM, WERE-AM, WZAK-FM and WJMO-AM. Weber comes to Radio One from Infinity, where he served as vp and general manager of stations KILT-FM and KIKK-FM in Houston... **John Rogers** was named general manager of Shamrock Broadcasting's radio stations in Oklahoma. He was formerly vp and general manager of International Media Partners.

Wright returns to AURN

Telliho packs bags for *Budget Travel*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MEDIA DISH

Premiere magazine celebrated its sponsorship of the recent Toronto Film Festival and pre-screening of *The Contenders* at Prego Della Piazza in Toronto. (L. to r.) Jim Meigs, editor in chief, *Premiere*; Kim Pinto, vp/publisher, *Premiere*; and actor Jeff Bridges, who stars in the upcoming theatrical release.

LARRY HAMMERNESS

Wenner Media's *Men's Journal* hosted a party at the Phoenix Lounge at the Argyle Hotel in Los Angeles to fete the mag's launch of its first book, *The Great Life*, due out from Penguin Books in October. (L. to r.) CAA agent Patrick Whitesell; Craig Kilborn, host of CBS' *Late Late Show*; and *MJ* editor Mark Bryant.

Calendar

The **Virginia Cable Telecommunications Association** will hold its **34th annual convention** Oct. 8-11 at the Hyatt Regency Hotel in Reston, Va. Contact: Barbara Davis at 804-780-1776.

Adweek Conferences, as part of its **Agency Dynamics Seminar Series**, will host a seminar Oct. 12-13 at the Atlanta Hilton & Towers. Contact: Adweek Conferences at 888-536-8536.

The **Consumer Electronics Association** will sponsor the **CEA Industry Forum & Fall Conference** Oct.15-18 at the Fairmount Hotel in San Francisco Contact: 703-907-7600.

The **International Communications for Management Group** will sponsor **Interactive TV: Explore Convergence** Oct. 16-17 at the Beverly Hilton, Beverly Hills, Calif. Contact: 415-817-0449.

The **Advertising Research Foundation** will hold a series of workshops Oct. 16-19 at the Roosevelt Hotel in New York. Contact: 212-751-5656.

CTAM will host a **Broadband Opportunity Conference** Oct. 18-19 at the Santa Clara Marriott in Santa Clara, Calif. Contact: Seth Morrison at 703-549-4200.

The **American Center for Children and Media** will host **Kids TV Goes Digital** Oct. 24 at 30 Rockefeller Center in New York. Contact: 847-390-6499.

The **Society of Professional Journalists** will hold its **annual convention and conference** Oct. 26-29 at the Adam's Mark Hotel in Columbus, Ohio. Contact: Tami Hughes at 765-653-3333.

The **Association of National Advertisers** will host a series of seminars Nov. 13-15 at the Rye Town Hilton in Rye Brook, N.Y. Contact: 212-697-5950.

The **California Cable Television Association** will hold its **annual Western Show** convention Nov. 28–Dec. 1 at the Los Angeles Convention Center. Contact: Paul Fadelli at 510-428-2225.

Inside Media

NEWS OF THE MARKET — Edited by Anne Torpey-Kemph

Mfume Targets Talent Agencies, Advertisers

NAACP president Kweisi Mfume told the first annual conference of the Black Broadcasters Alliance in Baltimore last week that "two culprits who thought they got away" from his organization's push for diversity in television are the talent agencies and major advertisers. Mfume said both will come under NAACP scrutiny in the coming months. He also said his organization has examined the top 100 advertisers on television to determine what products they are marketing to what audiences. Without naming names, Mfume chastised advertisers who "sneak in the back door" of the networks and secretly ask for commitments to shows aimed at white target audiences for their products. The goal is for the NAACP to figure out "what buttons to push" to get the advertisers to "build some camaraderie" and join the diversity fight, Mfume said.

CBS *MarketWatch Weekend* Ups Penetration

MarketWatch.com will kick off the second season of its weekly syndicated financial news series, *CBS MarketWatch Weekend*, with 80-percent clearance—triple the market penetration it had in its freshman season. Anchored by Susan McGinnis and Alexis Christoforous, the half-hour program has also nailed new sponsorships from Datek, Fidelity, Geico, Quest, Intuit and Compaq.

Seinfeld Nabs NATPE Chairman's Award

Comedian Jerry Seinfeld will receive the Chairman's Award next January at the 38th annual National Association of Television Program Executives confab in Las Vegas. The award is given every year to a person who has made an "outstanding contribution to the television industry."

UPN's Nunan Named HRTS Chief

UPN president Tom Nunan has been unanimously elected to head the Hollywood Radio and TV Society for the 2000-01 term. Nunan officially began his tenure last week when outgoing Society president Tony Jonas handed him the gavel at an HRTS luncheon featuring entertainment presidents from the six major networks.

Condé Nast and Ford Battle Breast Cancer

Condé Nast and Ford will launch their latest effort to raise awareness of breast cancer with a four-page special insert in October issues of *Vogue*, *Glamour*, *Mademoiselle*, *Self*, *Allure* and *Vanity Fair*.

Aliens Abduct Cable Channel

Move over, Mulder. The History Channel plans to reveal the real skinny on those little green men. On Thursday, Oct. 9, at 8 p.m., *History's Mysteries* launches *UFO Invasion Week*, investigating the intrigue surrounding extraterrestrials and whether the government is covering up their existence. The premiere of *Area 51: Beyond Top Secret*—a look at what really goes on at the Nevada "military base"—kicks off the week of specials. Following is the premiere of *Secret UFO Files*, examining suppressed CIA documents, on Tuesday; *Ancient Aliens* on Wednesday; and *Roswell: Secrets Unveiled* on Thursday. Citing the National UFO Reporting Center, the History Channel stated that there were more than 2,500 UFO sightings in 1999. Is the truth out there? Are we alone?

FPG INTERNATIONAL

History Channel will focus on flying saucers starting Oct. 9.

Inside Media

CONTINUED

Actress Yasmine Bleeth will be featured in the insert, sharing her own story of her mother's struggle with the disease. The section, which is projected to reach a total of 29 million readers, is the seventh in a series from Ford's campaign in support of the Susan G. Komen Breast Cancer Foundation.

American Zoetrope Signs New Pacts

Alliance Atlantis and Viacom Productions have signed exclusive television development deals with Francis Ford Coppola's American Zoetrope. Viacom's deal will focus on the development of series television, while Alliance Atlantis' two-year pact involves the creation and development of films and miniseries for TV.

Carsey-Werner Has Six Shows for Cannes

Carsey-Werner International is offering six programs at the Mipcom 2000 programming confab in Cannes, France. Up for international sale is the new John Goodman-starrer *Normal, Ohio*, as well as *Grounded for Life*, *Dog Days*, *3rd Rock From the Sun* and *That '70s Show*.

Virgin Radio Tops Webcast Ratings

London-based Virgin Radio (www.virginradio.co.uk), Ginger Media Group's Hot Adult Contemporary Internet radio station, topped Arbitron's Webcast ratings for July with 236,100 aggregate tuning hours. For February, the last time Arbitron released Webcast data, Virgin Radio was third behind two NetRadio (www.netradio.-com) formats, Hits and '80s Hits. This time, NetRadio's '80s Hits was second with 201,000, followed by Internet-only radio station KNAC.com in third place with 148,600. The radio ratings company is still trying to bring back its original Webcast estimate measures of cume and time spent listening, which became problematic when Real Networks disabled the unique identifier from its player due to privacy concerns.

RTNDA Study: Radio News Gets Heard

A new study commissioned by the Radio and Television News Directors Foundation found that while TV is the dominant news medium, people have more contact with radio news throughout the day and see it as a welcome form of radio programming. The survey of 1,229 adults found that more than half of radio listeners pay close attention to the news when it airs. More than 90 percent view it primarily as a local medium, saying that an important function of radio news is to inform people about community events.

BuyMedia Purchases Sales Software

BuyMedia, an online ad exchange for radio and TV, last week announced the purchase of the Tvscan and Cablescan divisions of Tapscan, which provides sales and proposal software for more than 1,000 TV stations and cable systems.

Combined with Marketron, a sales and proposal system for radio stations that BuyMedia bought earlier this year, the company's services represent the "only online solution that works with all three media," said CEO Mike Jackson.

HDTV Station Count at 154, NAB Says

The latest station to make the transition to digital is KTTC-TV, Quincy Broadcasting's NBC affiliate in Rochester, Minn., bringing the total number of stations broadcasting in digital to 154 in 54 markets, the National Association of Broadcasters reported last week. KTTC was ahead of schedule; according to FCC rules, the station isn't required to make the digital leap until 2002.

Jones Unveils Two New Radio Web Formats

Radio syndicator Jones Broadcast Programming has added two new niche formats for radio station Web sites, New Wave and Future Hits. Early in the summer, the Seattle-based programmer announced Web formats Totally Awesome '80s, That '70s Channel and Super Fly, and 14 others in development. Several traditional stations are streaming the formats on their Web sites, along with streaming the station signal. Citadel's WSSX-FM in Charleston, S.C., is running Awesome '80s, and Leggett Broadcasting's KSTR-FM in Grand Junction, Colo., streams Awesome '80s, Future Hits and New Wave.

Time Launches Education Special Report

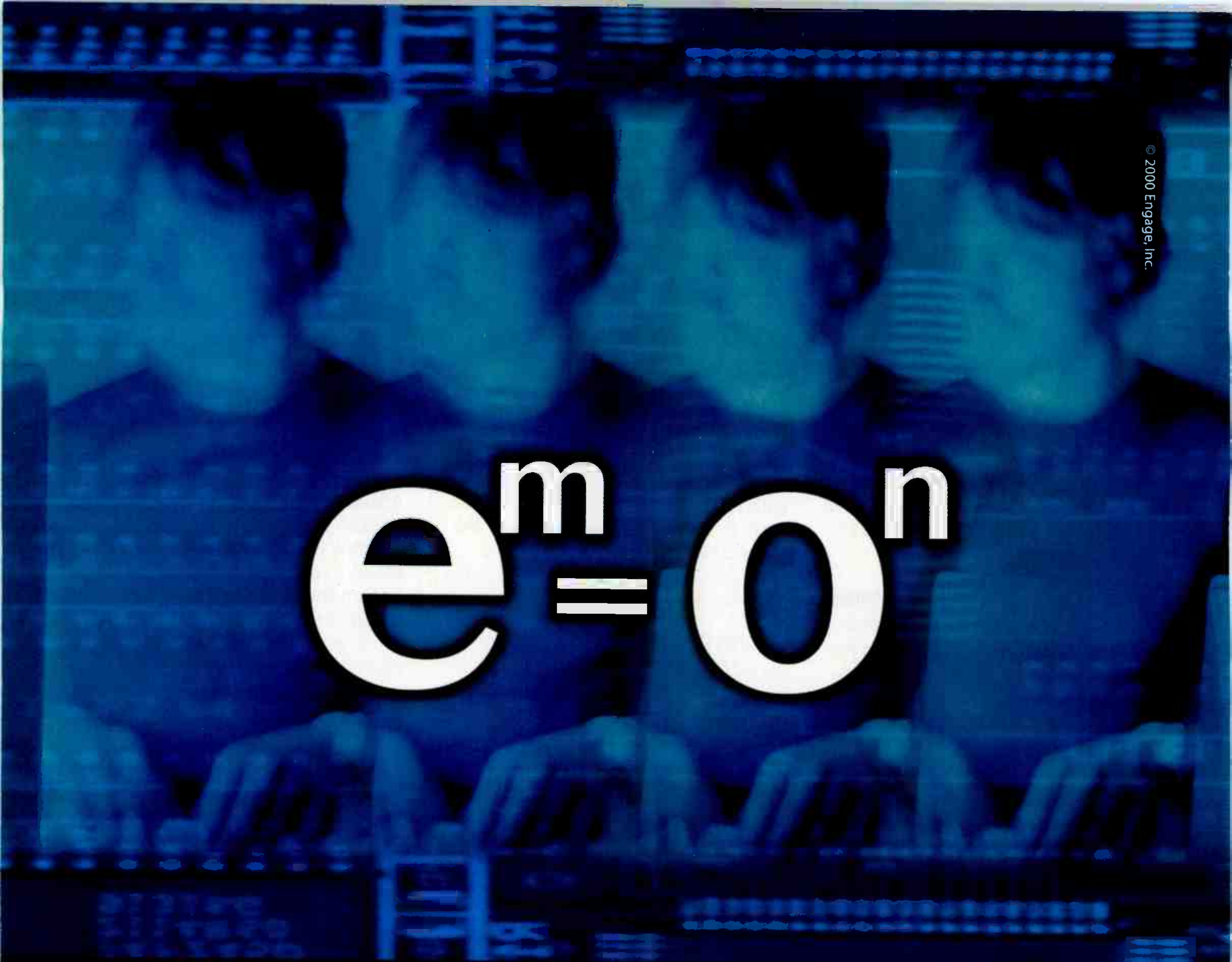
Time magazine has launched a monthly special report focusing on education. The six-to-eight-page reports, which started with the Sept. 11 issue, cover issues facing parents, teachers and students in national school systems. Volvo Cars of North America is a featured advertiser. The first report looked at the issue of standardized testing.

Meredith Suspends *Shop Online 123*

Meredith Corp. has decided to suspend publication of its Internet shopping guide *Shop Online 123*. The supplement, which was initially polybagged with 10 Meredith titles' subscriber issues and had a rate base of 4.9 million last October, was intended to be distributed again this holiday season. However, due to a downturn in the consumer dot-coms category, the company decided it wasn't a viable print option at this time. Meredith will maintain the title's companion Web site, Shoponline123.com.

Glamour, Atlantic Team for College Tour

Glamour magazine and Atlantic Records have teamed up for the 6th annual "Glamour Venus Music Tour," which launched last week at California State University-Long Beach. Atlantic Records talent Yve Adam and virginwool will perform at 10 college campuses nationwide for the month-long tour, sponsored by Lucky Brand. Complementing the nighttime performances are daytime festivals of fashion and beauty, showcasing the products of a large group of advertisers. In conjunction with the tour, *Glamour* ran a 27-page special college section in its September issue. This is the first time the Condé Nast monthly has partnered with the record producer on this event.



$e^m = o^n$
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Now that there are less than 90 days until Christmas, e-commerce pundits have crawled out of the woodwork to proffer their predictions on the e-holiday shopping season. Depending on who you want to believe, the tea leaves indicate: 1) It's going to be a banner year, the best ever, 2) It's going to be an okay year, or 3) It's going to be a terrible year, the worst ever for e-commerce. I guess it all depends on what flavor of paper millionaire you are: 1) You cashed out before things went south, 2) You work at Microsoft or Oracle, or 3) You used to work at Pop.com or DEN.—*Kipp Cheng*

IQ interactivenews

@deadline

IToymaker Takes Off

IToymaker.com, a Los Angeles-based new media agency that creates interactive customized entertainment for youth brands online, today launches with a group of strategic alliances including San Francisco-based **Pulse Entertainment** and **Britney Brands**, New York, among others.

Worth.com to Launch

Worth Interactive launches New York-based **Worth.com** Oct. 2, targeting those Web users with a net worth of $500,000 or more. **Worth Media**, publishers of *Worth* magazine is an investor in Worth Interactive. Worth.com will offer three core content areas: wealth, living and giving.

HGTV.com Blossoms

HGTV.com will relaunch on Oct. 2 with new features, content and projects from 18 Home & Garden Television shows. The site will also offer an original daily video "Tip of the Day" and later this fall will add live Webcams, including one in a warehouse in Pasadena, Calif., so flower fans can watch the creation of a Tournament of Roses Parade float from start to finish.

Corrections: In "Search Patterns" (Sept. 11), iProspect's Fredrick Marckini was quoted as saying that there are 3 to 5 million pages indexed in the average search engine. In fact, he said there are 300 to 500 million. Regarding the Curious Networks platform delivery story (Sept. 18), the company did not provide the *Chicago Tribune* with any content delivery technology. *IQ* regrets the errors.

ICast Comedy Channel Bucks Recent Trend

By Erik Gruenwedel

With entertainment Web sites under increasing scrutiny by advertisers and consumers following the much-publicized closures of Los Angeles-based Digital Entertainment Network, Pop.com, and most recently, Pseudo Programs in New York and MXGOnline.com, iCAST Comedy faces its own set of challenges. The online comedy channel of Woburn, Mass.-based iCast.com will kick off an online and offline promotional campaign beginning this month. ICast is the sole entertainment property in Andover, Mass.-based CMGI's portfolio of companies.

In anticipation of the channel's December launch, iCAST Comedy is planning a mid-October promotion that includes a 25-city college comedy tour in search of America's funniest students.

ICast.com says that it has learned from the mistakes of other entertainment sites, and is forging ahead with a promotional campaign.

Selected winners will join actress/comedienne Janeane Garofalo, who recently signed on as celebrity spokesperson for iCAST Comedy, on a proposed national tour next spring.

Early last month, CMGI announced plans to sell or eliminate several of its 17 Internet-based properties after incurring more than $700 million in losses during the last three quarters.

Despite the ominous message from headquarters, Brian Murphy, chief executive officer for iCAST Comedy, believes his company is immune to the proposed cuts.

"[ICAST] is their only entertainment site," Murphy said. "We aren't affected by that reorganization. [CMGI chief executive] David Wetherell and CMGI have been nothing but supportive for this venture and are committed to its success."

While Murphy doesn't necessarily see comedy as the genre that will save entertainment on the Web, he believes a proper mix of jokes, short-form animation, and streaming audio and video can be profitable.

"Some people believe we are entering the comedy game late on the Web," he said. "But frankly, what we have been able to do is [observe] what doesn't work on the Web and why, and translate that into a programming model and business model that makes sense for the Web."

ICast will have content aimed at mirroring the cable network Comedy Central, including a restricted access "blue room" featuring adult-theme humor, a 30-minute radio show with Garofalo and an expansive joke area designed to build a "significant traffic base," Murphy said. ICAST Comedy is operating on an advertising-supported business model.

Other eyeball builders for iCAST Comedy include distribution through iCAST's entertainment alliances with Palo Alto, Calif.-based search engine AltaVista and Houston-based Compaq Computer Corp. ■

Pay-For-Placement Search Services Offer Ad Alternative

BY KARL GREENBERG—Pay-for-placement search services are thriving and portals want in on some of the action, say analysts. According to Danny Sullivan, editor of Darien, Conn.-based SearchEngine Watch.com, an industry e-'zine, there are more than a dozen search companies offering some form of pay-for-placement on results pages, with more companies on the way. GoTo.com, with its recently inked deals with America Online and its subsidiaries, exemplifies this growing trend of offering advertisers an alternative to banner ads via search results placement.

The Pasadena, Calif.-based GoTo, which allows advertisers or sites the opportunity to bid for positions on keyword results pages, this week executes its services on CompuServe. GoTo's search results will be incorporated into CompuServe's main service as well as its custom brands. The deal puts GoTo's paid listings at the top of CompuServe-branded search results pages.

Also, on September 5, GoTo sealed a deal valued at $50 million with CompuServe parent AOL.com, allowing America Online to distribute GoTo's pay-for-performance listings on the search results pages of AOL, AOL.COM and Netscape Netcenter.

The distribution of GoTo across all of AOL's search is expected to be implemented this fall, while Netscape's GoTo results are now up and running, according to John Gentry, vice president of business development for GoTo.com.

"Prior to AOL/CompuServe, our reach was 24 million unique users," he said. "Post AOL implementation, we will be at 60 million unique users, reaching 75 percent of the Internet audience." AOL's reach is roughly 23 million users, while CompuServe has nearly 3 million members, and Netscape Netcenter 31 million registered users in July, according to AOL reps.

"The Netscape and AOL deals are huge," said SearchEngineWatch.com's Sullivan, adding that the deals also constitute a watershed in the search business. "In essence, Netscape, and soon AOL, are the first major services where advertisers can buy top listings," he said.

Bob Kington, vp of programming for CompuServe, said that its deal with GoTo is based on shared revenue from GoTo's customers, who bid for position on a cost-per-click basis. "They bring both revenue and good search results; it's an ad deal in the sense that they are paying for the right to be on that page."

According to Gentry, the AOL deals reflect GoTo's larger vision of itself as a business-to-business entity, a strategy afforded by the fact that its revenue isn't based on banner advertising (which would require it to sell real estate on its own pages) but on the listings themselves, which GoTo can put on anyone's pages.

But Sullivan said that, while this model garners qualified leads for advertisers, consumers may lose confidence in the integrity of search engines if they can't tell whether results are bought. "GoTo itself admits it had no reputation to lose when it launched its pay-for-placement service, but major players like Excite or Lycos could risk bad press if they undertook a large-scale sale of their main results," he said.

While GoTo, at its own site, displays the prices advertisers bid for placement, GoTo's results at CompuServe, are denoted with a hyperlink title, called "premium results pages." Only when you click on it do you arrive at a GoTo-branded CompuServe page with an explanation of how GoTo works. Netscape's top results, garnered from GoTo, are titled "partner search results" by Netscape.

"A partner search result, in this case, is an advertisement," said Sullivan. "And there is no way an ordinary person searching understands that these are ads," he added. "And they may not care, as long as they are relevant. There's nothing wrong with them selling that way, but to be honest with their users, they should call them something different than 'partner search results.' "

"I don't think it matters," said CompuServe's Kington. "If we termed the results 'editors best pick,' it might be an issue. I compare it to the yellow pages, where you see listings advertisers have paid to be prominent on the page. And Goto's results are good."

"Ultimately, I think these are useful services for advertisers," said Sullivan. "And while some may hate the idea that things can be bought and sold on search engines. But in many ways pay-for-placement gives search engines more control, which benefits consumers." ■

connect

Bridge Interactive Communications knows a thing or two about designing sites for packaged goods. The Cincinnati-based interactive shop has created 10 in all, the majority of which have been for neighbor Procter & Gamble. In its most recent work for P&G, Bridge redesigned Luvs.com, a site it originally created two years ago for the diaper brand.

Nancy Winè, vp of account service, and chief creative officer **Jerry Preyss** spoke with *IQ* about the hazards of working with a certain purple dinosaur.—*Jennifer Owens*

Packaged goods sites tend to get a bad rap for being too passive. Are contests [like the site's "Luvs Barney Rewards"] the key to making such sites work?

Jerry Preyss: I think that's part of it. The whole idea of creating a sense of community ... is something Nancy understands how to do, and it's a unique thing that Bridge does. But you're right, a lot of packaged goods site are pretty bland and are not as interactive [as the should be]. They're just transmitting pretty basic information and hawking goods online.

How does the Barney's program work on Luvs.com?

Nancy Winè: You collect the UPC codes from the actual package and send your points to Consumer Relations. Then you can go online to track how many points you have. The more points you have, the bigger, better Barney stuff you receive. And if your church group or your nursery work together to form a team, you can actually win a live performance of Barney.

How are you marketing the site?

NW: It's an integrated campaign. [The URL] is on all the packaging—it's on the diapers and the wipes and on in-store displays. And on Sept. 11, we did a special appearance on *The Rosie O'Donnell Show*, which was great. They showed the Luvs.com logo a couple of times in the program ... It drove our traffic up enormously the day it was on.

What's next for the site?

NW: We're looking at possibly doing some e-commerce and selling some variety packs through the site as well as some Barney toys and prizes. ■

Excite Introduces New Instant Messaging App

BY SARAH J. HEIM—Excite@Home today released Excite Messenger, the Redwood City, Calif.-based portal and broadband service provider's new online service that offers instant messaging capabilities to Internet users on PC-compatible computers around the globe.

Excite Messenger replaces Excite Pal, the earlier instant messaging service offered by Excite@Home. The new product is a step up from its predecessor, offering online communications access without additional downloads. In addition to text-based chat, users can also use Excite Messenger to converse in real time if their PCs are equipped with microphones and speakers.

While the thought of free, one-to-one instant voice messaging may cause some long distance carriers a few sleepless nights, Excite senior manager of instant messaging Amy Ebro said that Excite Messenger appeals to a different market. "It relies on the user being in front of the computer and being online," she said. Ebro conceded, however, that some erosion in the long distance market is bound to take place.

"Primarily, what we have seen is that the use of voice over IP is ancillary," said Lydia Loizides, an analyst at New York-based Jupiter Communications. But she added that as instant messaging moves beyond plain text-based chat, the importance of voice capabilities will increase in the coming years.

"I think the industry trends are proving that instant messaging is becoming a platform to build other content and services on top of," Ebro said. "It's a good platform to leverage and push other products from."

According to Ebro, the new messaging platform makes the possibility of expansion for other Excite@Home products and services, such as Excite Inbox and Excite Address Book, an achievable goal. For example, if a user isn't online when an instant message arrives, the next best thing would be to send along an e-mail urging the person to log on. Excite users could then send messages from their Excite Inbox and keep their addresses in Excite Address Book.

Links to Excite's Bluemountains.com electronic greeting cards, Excite Planner and Excite Shopping are also integrated into the Excite Messenger's menu bar for easy user access.

"We want to make sure our products work together reasonably," Ebro said.

Ebro said that Excite@Home is committed to developing products that work in tandem with other instant messaging services. Excite Messenger is an active member of the IMUnified, a coalition of leading technology and instant messaging companies established to create a set of specifications that will enable functional use among its members' instant messaging services. By the end of the year, Excite Messenger is expected to be fully compatible with founding members of the coalition, including AT&T, Yahoo!Messenger, Tribal Voice PowWow and MSN Messenger—basically everyone in the market except for AOL and ICQ.

"The only way companies can really present a good force against AOL is to come together," said Loizides. "Instant messaging is a very powerful tool." ■

EW.com, Promotions.com Tout NBC Lineup

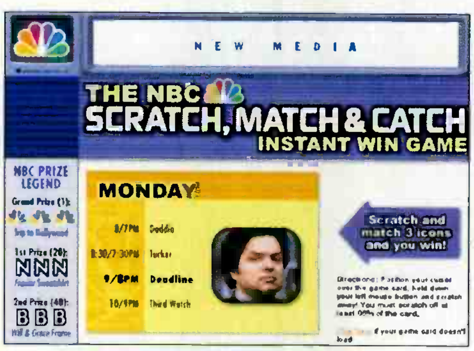
BY JENNIFER OWENS—A virtual "scratch and win" game will publicize NBC's new fall lineup of programs in a new promotion created by *Entertainment Weekly*'s EW.com and Promotions.com, a New York-based maker of online promotion products.

"The NBC Scratch, Match & Catch Instant Win Game" premiered last week and will run until Nov. 10 on a microsite built specifically for the game. EW.com plans to highlight the promo through its own existing banner and button ad spaces.

Visitors, who must register their names and e-mail addresses to play, use their mouse to scratch at an image of the NBC prime-time schedule for that particular day, explained William J. Stutzman, director of EW.com. Users can play up to twice a day with 1 in 114 odds of winning NBC-related products such as branded mugs or the grand prize, which includes a studio tour and tickets to see a live taping of *The Tonight Show*.

"[NBC] was looking for a way to promote its fall schedule online, and everyone wants to go beyond the banner," said Stutzman. "What this provides is getting people to interact daily with [NBC's] schedule ... It's a way to get [users] back every day instead of trying to buy enough advertising to drive them in everyday."

In addition to awarding prizes, the scratch and match promotion will build an e-mail database filled with the names of users who have opted in to receive more information from NBC, while also asking users a random question chosen from a pool of six created especially for NBC, such as "Is Michael Richards from *Seinfeld* getting his own show on NBC?"



ITCHY FINGER: EW.com and Promotions.com have launched a virtual scratch and win promo for NBC's new fall lineup.

"The point is not that they answer correctly or incorrectly," said Promotions.com partner Steve Caputo, "but that they have to answer it. They can't get to the game unless they answer it ... I equate it to a speed bump."

For other Promotions.com clients, which currently include popsecret.com and kraft foods.com, the questions can be more research-oriented. But Caputo said that in this case, NBC was more interested in "reinforcing what the programs are. It really just puts the name of the programs out to [users] one more time."

In that vein, the game will direct players to NBCi.com/premier, which touts NBC's new fall shows. NBC also has agreed to be the exclusive sponsor of EW.com's fall TV preview coverage.

Stutzman said that while the game will be promoted solely through EW.com's own ad space, "the idea is that in the end, [NBC] could promote it anywhere they want."

And while the interactive, instant-win contest is a first for EW.com, Stutzman said it won't be its last. Already, he said, the site has sold a similar scratch-off promotion to Purina O.N.E., a pet food brand that will debut its own game later this fall. ■

Disney Net Group Livin' Large With New Ads

BY SARAH J. HEIM—At a time when standard banner ad efficacy is in question, the Disney Internet Group has rolled out a new ad unit, called "Big Impressions," that company reps hope will continue to attract advertisers and encourage customers to click.

Already available on the Disney Internet Group's ESPN.com and GO.beta.com—the beta version of the newly revamped GO.com Web Guide—these alternative banner ads "Don't look, walk or talk like a banner ad," said Thomas Hartman, vice president/worldwide sales at GO.com.

The large, uniquely sized 260-by-180 pixel ad units appear in the upper-right-hand corner of the site's homepages. They are sold on a day-by-day basis and have a $35 CPM, Hartman said. The North Hollywood, Calif.-based Disney Internet Group plans to roll out these advertising units across its network of sites—which includes ABC.com, ABCNews.com, Family.com, Disney.com, WallOfSound, MrShowBiz.com and Movies.com—throughout the fall.

Not only do these ads provide a page-dominating branding experience, they also handle enhanced creative applications such as drop-down menus and streaming media.

Hartman believes the unusual size and location of the "Big Impression" units will make users more inclined to clickthrough than when encountering traditional banner ads.

"The perception in the market is that there is user fatigue with the banner," Hartman said. However, because the "Big Impression" ads will only be seen on Disney Internet Group sites, Hartman and others hope that they will be more enticing.

BIG IS BETTER: Disney Internet Group's "Big Impression" ad units are larger than standard banners, encouraging users to clickthrough.

GO.com, the sixth largest site on the Web, also recently launched ActivAds, another type of advertisement. These ads are prominently positioned on all search results pages and provide a combination of drop-down menus, search boxes, and GIFs and links, Hartman said. The ads appear on the right-hand column of the search results page and are integrated with other content, a SpotBanner and commerce-focused links.

Focus group work done by GO.com found that users responded well to advertisements that were targeted and valuable, Hartman said. To this end, GO.com's in-house design team came up with ActivAds, which use the keywords entered by users on the search page to target the advertisements that appears with the found set.

"The concept of the ActivAd is to focus the advertiser on providing valuable functionality or content that links the user right to their site," Hartman said.

Interested advertisers are now able to surround their targeted audience by purchasing all the ad slots on search results.

"This gives advertisers the opportunity to present all they have to offer," said Hartman.

Hartman added that there has already been interest in the new advertising options, not just by veteran advertisers, but also by those who understand the value of building a brand and are cognizant of the new opportunities popping up on the Internet. ■

Jupiter Media Metrix Unveils United Logo

BY ANN M. MACK—On the heels of the finalized merger between Jupiter Communications and Media Metrix last week, the newly combined research and analysis firm unveiled a fresh logo to reflect the consolidated assets of the newly formed company.

New York-based Jupiter Media Metrix, the offspring of the two Internet research firms, borrowed elements from both of its parents' existing logos to create an updated look for its own brand stamp. From Jupiter Communications' logo, the new company took the circles; from Media Metrix, the new logo adopted the cross. "We borrowed from both and we feel like we've created something new," said Gene DeRose, president and chief operating officer of Jupiter Media Metrix.

Christopher Johnson and Associates, a company that creates and builds brands, aided Jupiter Media Metrix in its branding efforts. The New York-based shop chose to use a blue, black and white abstract symbol for the logo, rather than a literal one. "How do you reflect [all their areas of competency] in a literal symbol?" asked Chris Johnson, president of Christopher Johnson and Associates. "It would be impossible."

The company, which was tapped by Jupiter Communications to create its logo earlier this year, also sought to develop a symbol with staying power. "The best brands and logos are brands and logos that last for a long time," said Johnson. Paul Kelly, vp of corporate marketing for Jupiter Media Metrix, agreed, saying, "There were strict marching orders to create a classic logo with longevity, rather than a trendy logo."

Christopher Johnson and Associates also worked with Jupiter Media Metrix to tackle the branding challenges inherent in any merger. Back in June, when the merger was proposed, many raised concerns about the cultural differences between the two companies. Media Metrix was known for its conservative nature, while Jupiter Communications had been labeled "a bad boy," Johnson explained. "It was more of an outside perception than an internal reality," he said.

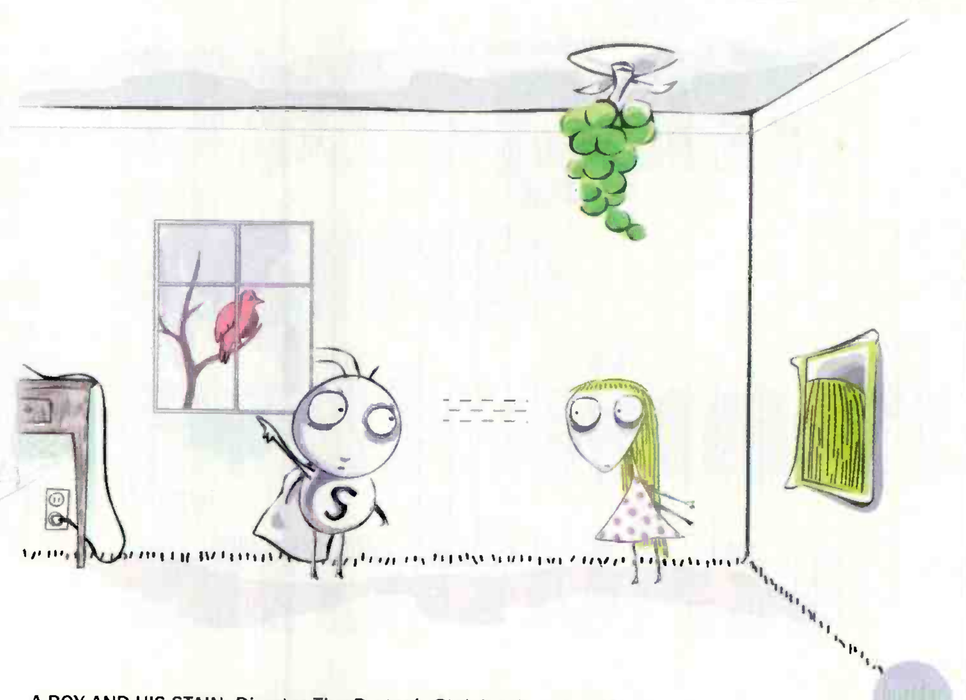
In its new brand position, Jupiter Media Metrix wanted to highlight the synergy of the two businesses, yet put forward the notion of two respected brands. "We were bringing together two strong businesses into a merged entity," Johnson said. "We wanted to make sure nothing was lost in the translation."

Late last week, Jupiter Media Metrix introduced its first initiative as a unified company. Called Jx Intelligence, the new suite of subscription-based services offers clients analysis and research about markets, regions, industries, technologies and customer groups by tracking activity, noting trends, analyzing industry segments and evaluating the competitive landscape. ■

Shockwave.com Continues to Grow Despite Tepid Market, Debuts New Programming

BY KARL GREENBERG—While a growing number of broadband entertainment dot-coms have recently sunk like over-freighted barges in stormy weather, Shockwave.com, whose *sine qua non* is broadband content that's narrowband-friendly, continues to remain afloat, and is launching even more new content this week.

Beginning tomorrow, the site will premier its new fall lineup, with diversions that include offbeat Hollywood director Tim Burton's animated series, *Stainboy*, based on a character from his book, *The Melancholy Death of Oyster Boy and Other Stories*; and the newest episode of *Radiskull and Devil Doll*, a series of animated shorts designed in-house by Macromedia animator Joe Sparks. In addition to these Shockwave.com exclusive programs, last week the site rolled out an interactive Shockwave-enabled interpretation of pop doyenne Madonna's number-one hit single "Music."



A BOY AND HIS STAIN: Director Tim Burton's *Stainboy* is one of the new programs appearing on Shockwave.com beginning this week.

San Francisco-based Macromedia launched Shockwave.com on May 24, 1999, as a consumer online entertainment destination. It was also meant as a showcase for rich media built in Macromedia's proprietary vector-based graphics and animation products such as Flash and Shockwave. Since last year, Shockwave.com has seen its registered user base increase five-fold—from 5 million in October 1999 to 25 million by July 2000. In July, said company reps, the site garnered 8.2 million unique visitors, up from 4 million in the beginning of the fourth quarter of last year. According to Michael Yanover, Shockwave.com's vice president and general manager of series and show content, the site now features nearly 170 original programs.

"Our secret weapon is that you can watch or play on our site on a 56K modem and have a very compelling experience," Yanover said. "You don't need to have a T1 or DSL connection; and when you consider that 95 percent of the U.S. Internet users are [logging] on at dial-up speeds of 56K or less, that becomes relevant. We are not trying to be a place that you can only appreciate with high-speed access."

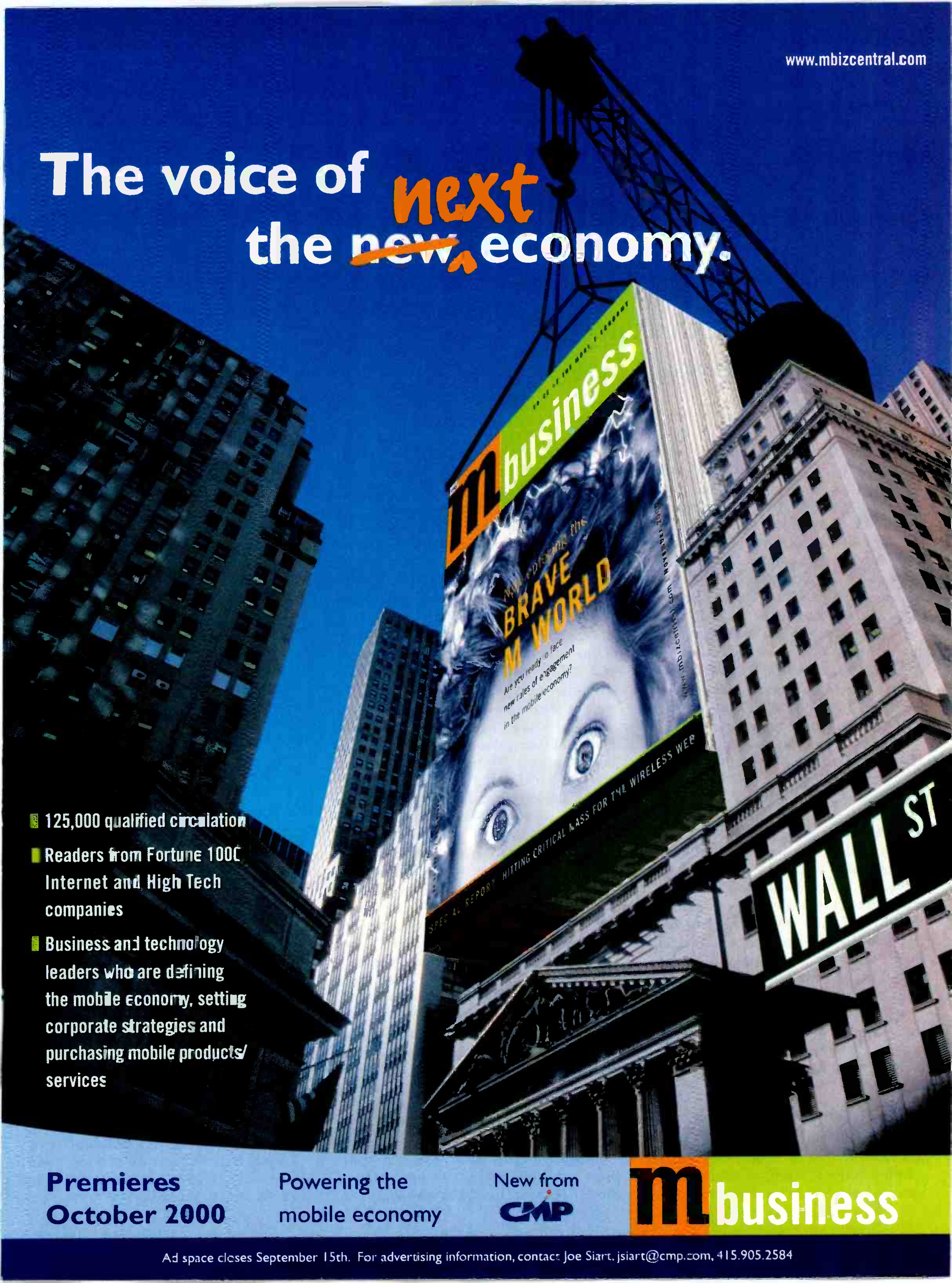
Entertainment sites have been notorious for not making money, evinced by the recent closures Pseudo.com and Digital Entertainment Network, the original poster children for Internet-as-cable TV. And while Yanover won't say whether Shockwave.com's balance sheet is in the black, he claimed that "we are making revenue."

Yanover pointed out that co-sponsorships and merchandising combined with low production costs keep liabilities down. "If you look at the content launching this week, Tim Burton's *Stainboy* has been substantially underwritten by Compaq, the show's sponsor." Yanover said Compaq will have brand placement on the homepage and links to the Compaq's site at the beginning and end of each of the six Burton episodes. "We also have ad banners running at the same time on those pages. We think that's a solid model." He added that, concurrent with the new *Radiskull* episode, Shock wave.com is launching an online store offering branded merchandise from Sparks' animated cartoon, which, according to Yanover, has garnered a large cult following.

"The online store will launch with T-shirts, toys, caps and other merchandise from *Radiskull*," he said, adding that the show is also being created internally on a low-cost basis. "That means we have ad banners and transactional income from merchandise you can only buy on our site, based on characters you can only watch on our site, so merchandise is sold at market value, not at a discount." He said the online store is largely in response to fans. "We have only had three episodes of the show, and we have received 10,000 letters so far asking for merchandise."

The company last week announced the Shockwave Single for "Music," the title track from Madonna's new album. The interactive video for the song, available exclusively on Shockwave.com, is linked to a Macromedia Shockwave-powered display that allows a user to collect flashing icons or "tokens" throughout the song, which they can trade in to mix their own version of the single. Some of the site's other Shockwave Singles include tracks from artists Chuck D, Phish, Todd Rundgren, The Cure and Tsar, according to company reps.

Yanover said Shockwave.com is also experimenting with other ad schemes involving embedded product placement or ads within shows themselves that link back to advertiser's sites, although he could not comment on specific executions. ■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War of the Rosés

Will the merger of Wineshopper.com and Wine.com create an unstoppable portal of potent potables? Yes and no. By Janis Mara

Now that online vintner WineShopper.com and former archrival Wine.com have popped the cork and announced an upcoming merger, the question arises: Will the new all-things-wine megasite create an online monopoly that crushes the grapes of similar sites?

According to a varietal, er, variety of sources, the answer is no. "It's true that the merger creates the dominant player, if not in sales, then in stature. But that's not to say that everyone else is going to disappear. It just makes it more difficult for them," says Ken Cassar, an analyst at New York-based Jupiter Communications.

Wine.com CEO Bill Newlands, who will stay on as CEO of the new company, says "We have established competitors, including eVineyard.com. Any time you have a competitor, you always expect that you're going to have a good race."

For rivals of the Napa, Calif.-based companies, which will go by the brand name Wine.com after the merger closes next month, the race is already a good one. In fact, Brett Lauter, chief marketing officer of Portland, Ore.-based eVineyard, claims to be unfazed by the proposed merger and says the online wine-selling arena will continue to grow, and offers lots of room for the merged company's competitors. "It is expected that online wine sales will eventually earn around five to ten percent of what is currently a $19 billion total wine market," says Lauter, citing statistics from a report by analyst Mark Swartzberg of New York's Salomon Smith Barney.

Lauter believes that the days of wine and roses are not yet over, citing the overall wine industry's growth rate of 15 percent per year for the last several years.

The threat for online wine merchants, however, may be Uncle Sam. Indeed, the main obstacle facing Web-based wine sellers is government regulation, according to Jupiter's Cassar. Most states restrict the sale and delivery of alcoholic beverages across state lines.

Wine.com's Newlands says the merger of Amazon.com-backed WineShopper.com and the independent Wine.com, which launched in 1995 as Virtual Vineyards, one of the earliest online businesses, was a natural. "We felt the companies had unique strengths that were complementary. A merger would mean we would not spend time and energy fighting each other, but could build our network around the world," says Newlands. "WineShopper.com did a good job building up the back end. They have a fairly comprehensive system that handles each state's requirements in a highly automated way."

Newlands says that between the two sites, just about every wine-related content player is represented. "We have partnerships with *Wine Spectator*, *Wine Today*, *Food and Wine*, Opentable.com, the *Wall Street Journal*, *The New York Times*, MSN.com, AOL and, of course, Amazon."

Now that the merger has been announced, what's going to happen next? Already, the merger has caused major changes, at least for a number of WineShopper.com and Wine.com employees who were laid off earlier this month. Though Newlands declined to state the exact number, around 36 WineShopper.com workers and a smaller number of Wine.com employees got their walking papers.

"We have done some reduction where there was duplication in the companies," Newlands says. "But when we end up with one company we are going to be significantly larger than each company separately."

According to Newlands, the company's next step will be to "build our network around the world."

Expansion abroad makes sense for two reasons: First, Newlands says, "when you see the aggressive growth of the Internet in places like Europe and Asia and how that matches up with per capita consumption of wine, it's a very attractive market." He says that most of Europe "has a per capita consumption that's anywhere from 10 to 15 times what the average is in the United States."

Secondly, the regulatory environment is much simpler elsewhere, because other countries "are more wine cultures," Newlands says, and because "as they say, 'There's 50 countries in the United States and only 17 in Europe.' "

VINO VERITAS: Following the close of the merger of Wineshopper.com and Wine.com, the new company will be known as Wine.com.

According to Jupiter's Cassar, in the wake of the merger, "We'll see a few mass players and a number of niche players. We won't see medium-sized businesses. We're starting to see this right now; in fact, throughout every retail sector we're seeing companies shaking out. The small businesses will aspire to grow. Some will succeed, some will go out of business. And some will have to shrink back to the niches." ■

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Choose or Lose

Using MindArrow Systems' eBrochures, Youth-e-Vote Gets Teens Involved With the Election Process. By Sarah J. Heim

American citizens under the age of 18 may not be old enough to cast a vote in next month's Presidential election, but the folks at Youth-e-Vote—through an online campaign featuring eBrochures—are doing everything in their power to ensure that these kids are the first at the voting booths when they come of age.

"We're trying to turn today's students into tomorrow's voters," says Donald Tighe, director of public affairs and government relations at Washington-based Youth-e-Vote. "We need to try and engage young Americans before they even become voters."

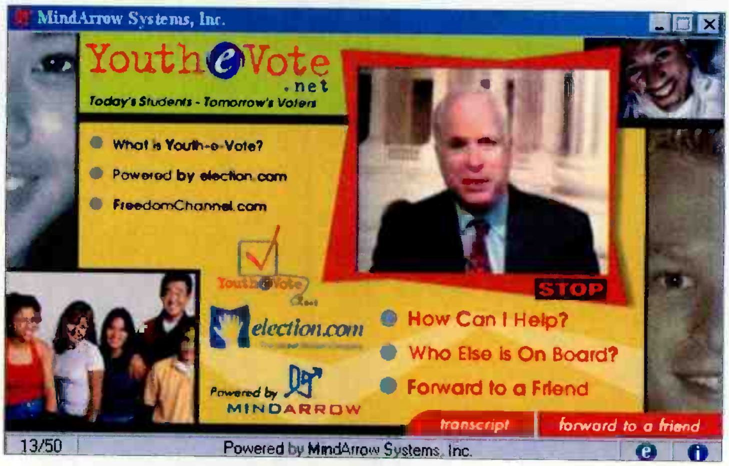
Not surprisingly, the nonprofit Youth-e-Vote has focused its youth awareness campaign via the Internet, where millions of teenagers surf and swap e-mail every day.

On Nov. 2, just five days before Election Day, Youth-e-Vote will sponsor an unofficial election on its Web site, located at www.youthevote.com. Poised to be the largest online vote ever, according to Tighe, the election will bring together students of all ages, from schools across the country. They will be able to log onto the site and vote for President, as well as in state senate and gubernatorial races.

Getting word out about the historic Youth-e-Vote election has been facilitated by the donation of eBrochures, which are electronic multimedia messages designed by the Aliso Viejo, Calif.-based application service provider MindArrow Systems.

Unlike more traditional marketing tools such as print brochures and direct mail, eBrochures offer an inexpensive, easy-to-track and arguably more effective alternative for marketers and sales people.

"As with a typical brochure, background images can change and personalized messages from the company president or CEO can appear within," says Mike Pennell, vice president of marketing for MindArrow Systems. However, unlike their print counterparts, eBrochures also offer marketers the ability to track important details about recipient behavior, such as who read the message and who requested more information on the product or event—without infringing on the viewer's privacy.



ROCK THE E-VOTE: Washington-based Youth-e-Vote enlisted MindArrow Systems to create an eBrochure to promote an online mock election aimed at students across the country.

These highly compressed, self-contained eBrochures—which can be distributed via e-mail or downloaded directly from a Web site without the use of plug-ins or players—can deliver video and audio, as well as graphics and interactive hyperlinks to recipients.

Although eBrochures can take up to a minute and a half to download using a 56K modem, the high-quality end result is the same regardless of a PC's Internet connection speed, Pennell claims. MindArrow is in the process of developing eBrochures that can also be downloaded on Macs and expects that these files will be up and running by the beginning of next year.

The first of several upcoming Youth-e-Vote eBrochures was sent to 15,000 education leaders nationwide last week. Featuring Sen. John McCain (R-Ariz.), Lt. Gov. Kathleen Kennedy-Townsend (D-Md.) and several teens, the interactive message urged students, teachers and adults to get involved in the political process, at every level.

"When you vote, you have the power to rock the world," Sen. McCain persuasively told recipients who took the time to open the eBrochure.

According to Pennell, an eBrochure created by MindArrow, announcing teen music sensation 'NSync's recent album release, was viewed by 34 percent of the 250,000 people who received it. While these numbers are high in comparison to the 1.5 percent read rate for direct mail, even more intriguing is the data on the number of times recipients viewed the same eBrochure and how often they sent it along to friends.

Recipients who opened the 'NSync eBrochure and saved it on their desktop clicked on it an average of seven times, and 64 percent of unique viewership came from those who had received the announcement from a friend.

Perhaps the Youth-e-Vote campaign will help to increase the number of young voters in America, a number that has been declining over the past two decades. According to Tighe, in the 1996 presidential election, only 32 percent of 18- to 24-year-olds voted.

Tighe and his colleagues at Youth-e-Vote hope that by receiving an eBrochure, kids will be encouraged to spread the word about the mock online election to their friends and that the importance of voting will become instilled in their minds for elections to come. ■

Winning Combo

Dot-coms discover that jocks make ideal spokespeople. But will users click with the star athletes? By Sarah J. Heim

BOING!: Olympic trampolinist Jenny Parilla entices new users by wearing gear that prominently features Flipside.com's logo.

Maybe it's a reflection of the public's enduring worship of athletes, but it seems that sports figures can sell just about anything these days. Call it cool—or hot or phat—by association, having a star athlete represent a brand often does wonders for the product's mind- and marketshare. When you think about b-ball legend Michael Jordan, you think Nike. When you think about NBA All-Star forward Grant Hill, you think Sprite (despite the soft drink's anti-image campaign).

Beginning this month, when you think about trampolinist Jenny Parilla, you'll think Flipside.com. At least that's what the marketing team at the arcade-style gaming site is banking on.

Even before the Flipside.com sponsorship of the Sydney-bound athlete was announced in late August, the 19-year-old trampolinist had already garnered her fair share of media exposure, especially for an athlete competing in an obscure Olympic event.

But it's that edgy, unexpected exposure that Flipside.com hopes will rub off. With any luck, Parilla's prominently worn Flipside.com T-shirt and jacket—coupled with her public enthusiasm about the site—will drive curious players to the Berkeley, Calif.-based online gaming destination where players can win cash and prizes.

"Jenny's ... the type of person who goes to our site," says Flipside.com's Vernon Thompson, who adds that Parilla's adventurous spirit as the only American to participate in the first-ever trampoline exhibition at the Olympics makes her like other Flipside.com users: fun, energetic and spontaneous.

SPORTY SPONSORSHIPS

Finding the perfect offline sponsorship opportunity to help gain brand loyalty—or at least awareness—in the marketplace is a growing trend among dot-coms. "Many dot-coms are going the offline route," says Christopher Todd, an analyst with New York-based Jupiter Communications. "Aside from major television slots, it's the best way to experiment with, and to drive the value and affinity of, a product."

Plus, offline sponsorships typically do not bear the hefty price tags of TV commercial spots. Thompson is the first to admit that Flipside.com's decision to sponsor Parilla this fall was an experiment, and an unconventional one at that. But he is quick to add, "If this works the way I think it will, we'll continue doing it."

Thompson's positive attitude about the brand marketing possibilities associated with offline sponsorship isn't unusual or unwarranted. Marketers looking to promote brand awareness or shift brand perception can find great success by introducing the right athlete to the right consumer, says Jupiter's Todd. However, he adds, "If you're looking to actually sell products or seek a very measurable return, and you don't have the right combination, you could be hurting when all is said and done."

BE TRUE TO YOUR ECO-TEAM

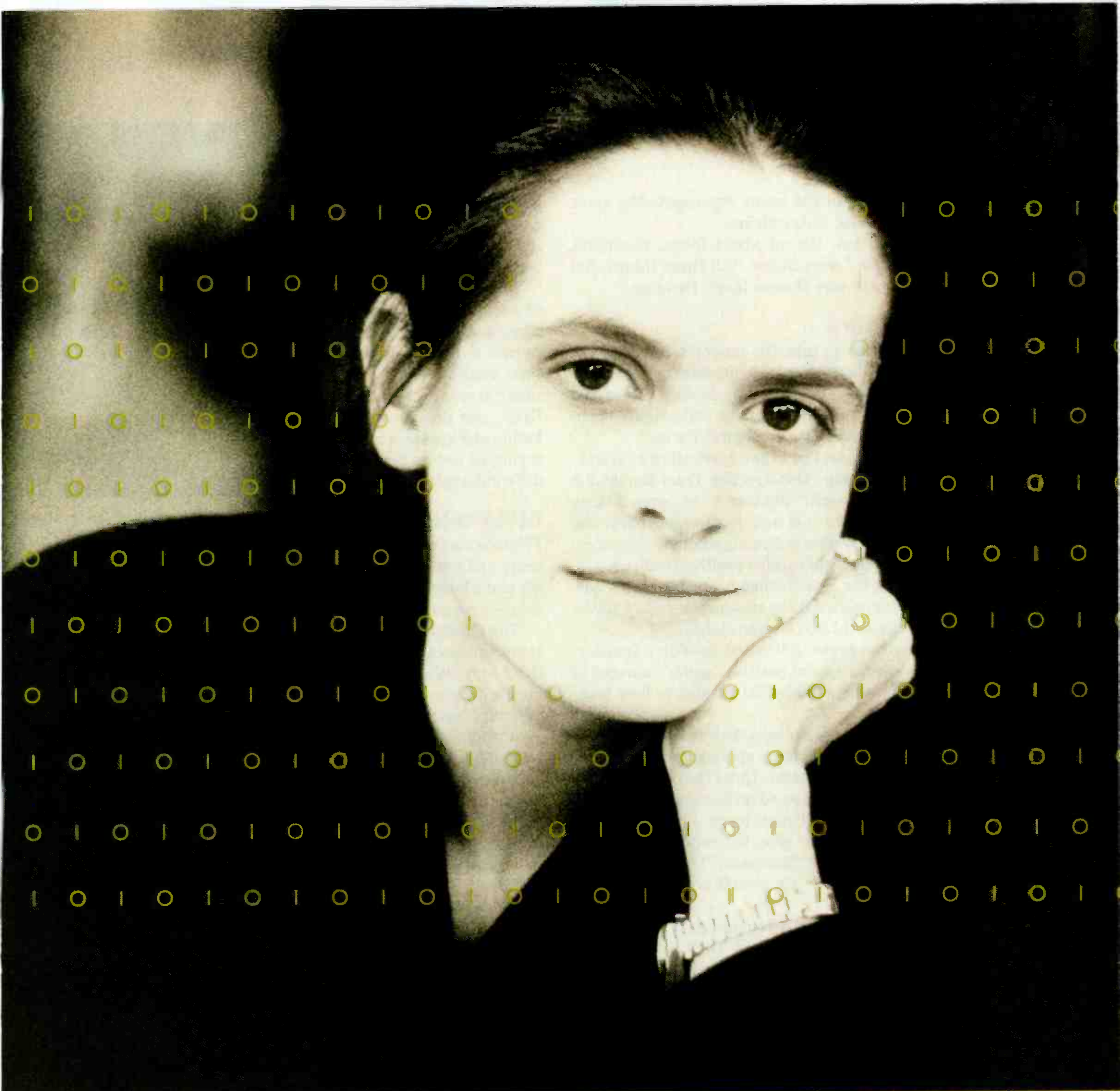
There may be no easy way to gauge how much additional new business is generated by an athlete like Parilla sporting a Flipside.com logo on her jacket or talking at press conferences about how much she enjoys playing games like solitaire or chess on the site. But there's also no denying that people can be very loyal to particular athletes and sports teams.

"To develop this kind of alignment puts companies in a favorable position with the fans," Todd says.

This is exactly what the media relations department at Atlanta-based ISP EarthLink.net had in mind when they decided to sponsor one of 74 four-person teams in this year's Eco-Challenge. The hard-core sporting event—touted as the toughest expedition race in the world—was held in Borneo and has gained increasing recognition since its genesis in 1995.

According to EarthLink's media relations director, Arley Baker, people who participate in and watch this grueling sporting event—where teams race 300 miles nonstop, 24 hours a day, en route to the finish line—are typically college-educated, active and sophisticated Net users—just the folks EarthLink wants to attract.

Not only that, but the type of dedication and desire exemplified



by the athletes participating in the event represents the same strong work ethic at EarthLink, Baker claims.

"To be in this competition, it's all about focus, discipline, strength and communication," says Baker. "All these things that are core to Eco-Challenge are core themes in our business."

BUDGETS VS. BRANDING

EarthLink made the decision to take the money to sponsor the Eco-Challenge team out of its corporate communications budget, rather than using its advertising or marketing funds. "This is just pennies in terms of your typical six-, seven- or eight-figure sponsorship," Baker says. "This was below six figures for us."

Claudia Caplan, vice president of brand marketing at EarthLink, sees an offline sponsorship campaign like Team EarthLink as having a "sort of goodwill benefit." In other words, even if there is no direct correlation between cost and revenue payback, she expects that there will be a heightened recognition of the corporate logo and that the company will receive positive feedback.

The agreement to make the Eco-Challenge sponsorship a corporate communications campaign did not arise as a result of advertising budget cutbacks at EarthLink, Caplan claims.

In fact, as a result of the growing interest in offline sponsorship, EarthLink has created a special position, senior manager of sponsorship and special events, held by Val Whalin, to help manage the volume of requests.

Similarly, Flipside.com's Thompson says that its decision to try a more unconventional offline sponsorship approach was not made because of advertising spending cutbacks. Quite the contrary, Parilla is only a small part of a $10 million advertising campaign that kicked off after the lighting of the Olympic torch.

"Jenny was a part of our strategic plan, but not because of cutbacks in advertising spending," says Thompson. "We see this sponsorship as a tremendous opportunity for growth and a way to help maintain our user loyalty."

Although the recent buzz in the dot-com industry has emphasized shrinking ad budgets, Jupiter analyst Todd concurs, "We haven't seen any clear indication that dollars are shifting into offline sponsorships because of budget cuts."

Mainly, what these alternative marketing strategies are driving at is getting to people in new and innovative ways. "We want to get on people's radar screens," says Virginia Gray, vice president of marketing at Flipside.com. "We're trying to get at people from different angles."


KELLY KRATNECK

BUFF BIKERS: Earthlink wanted to align its brand with Eco-Challenge's aura of strength and dedication.

OLYMPIAN EFFORTS

Flipside.com's Gray has an acute understanding of branding and a history of revitalizing brands that have fallen by the wayside—most notably, the Avon cosmetic line in the 1990s.

The Olympics provide a great platform to launch a branding campaign because the Games combine entertainment and sports, Gray says. When she wasn't flipping around on the trampoline, Parilla did a satellite media tour and appeared on CNN, the Entertainment Network and a host of local television stations, always espousing the joys of gaming on Flipside.com.

EarthLink is also using the offline sponsorship to make more of a publicity push. And so far, it appears to be working. Next spring, the primetime news series *48 Hours* will air an episode covering the Eco-Challenge. There will be prominent exposure and training footage of one of Team EarthLink's three male members and its sole female member.

"This is just a different, noncommercial way to catch people. It opens people's minds," Kaplan says in reference to the Team EarthLink sponsorship. "Gaining recognition means the difference between a friend and a stranger showing up on your doorstep." ■

SPIKE IT!: Spike.com CEO Ashley Farr (left) and COO Nick Abrahams hold down the fort at the company's Los Angeles studio.

Gen-X Games

Streaming media provider Spike and Nike team up to produce a different brand of Olympic coverage.

By Erik Gruenwedel

Photograph by Alan Levenson

While much of the Internet traffic for the ongoing Olympic Games in Sydney, Australia has focused on obtaining real-time results and commentary rather than waiting for the 15- to 18-hour tape delay of U.S. TV broadcasts, Nike.com is Webcasting, among other things, the streaming-video adventures of Billy and Volki.

The Webcast, from Nike.com, the Web component for the ubiquitous Beaverton, Ore.-based sports and fitness brand, follows a fictitious pair of Aussie teens in search of Olympic counterculture and a mystical athlete. It represents an innovative slice of programming from Radio Free Sydney, a 24-hour Internet radio channel on Nike.com/2000 that targets the 16- to 18-year-old demographic.

The site was produced by Spike.com, a 34-employee, Los Angeles-based streaming-media services company that includes SpikeRadio, SpikeTV and SpikeVideo.

Traffic to Olympic-themed Web sites is expected to reach 73 percent of the country's households with Internet access, according to a report in *The Hollywood Reporter* (Sept. 10).

Olympic Banner Ads Scored High Marks

How was the competition among advertisers of officially recognized sponsors of the Olympic Games? As measured by New York-based Media Metrix, taking the gold—by a huge margin—is IBM's banners for its promotional Olympic site and the official olympics.com, which tallied a grand total of more than 30 million ad impressions. Meanwhile, Sydney 2000's banners took silver, with a total of more than 16 million impressions for the period June through August 2000.—*Sid Ross*

Company: SOCOG. Sponsor Status: Organizer. Impressions: 16,359,529.

Company: GE. Sponsor Status: N/A. Impressions: 281,318.

Company: IBM. Sponsor Status: Worldwide Partner. Impressions: 11,019,418.

Company: Kodak. Sponsor Status: Worldwide Partner. Impressions: 255,531

Company: Oldsmobile/CNNSI. Sponsor Status: Worldwide Partner. Impressions: 9,437,926

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movers

New York-based <kpe>, a digital media and entertainment company, announced three new appointments: **Matthew Ringel** was named vice president, strategy; **Sanford Anopolsky** was named vice president, strategy (west coast); and **Robert Argento** was named vice president, corporate communications. Prior to joining <kpe>, Ringel was president of CAMI Spectrum, the television and events production subsidiary of Columbia Artists Management, New York; Anopolsky was formerly a management consultant with Boston-based Bain & Company; Argento served as director of media strategy at New York-based Middleberg Euro ... **Steve White**, director of product planning and research at Redmond, Wash.-based MSNBC.com, was promoted to chief technology officer. Prior to joining MSNBC.com, White was director of technology at the Corbis Corporation, Bellevue, Wash. ... Focus One Media Group International, a Geneva, Switzerland-based marketing communications services company, named **Chuck Kushell** global chief executive officer. Kushell joins Focus One Media Group in New York after serving as president of the New York office of Hill, Holliday, Connors, Cosmopulos/NY ... San Francisco-based Echo Networks, an Internet radio service, named **Tuhin Roy** evp of strategic development. Prior to joining Echo, Roy practiced corporate law in Silicon Valley ...

New York-based Bigfoot Interactive, a direct e-marketing company, appointed **Tim Dolan** vice president, list services division. Dolan was director of business marketing services at Orange, Calif.-based Experian Information Solutions ... **Stuart Zakim** has joined Woburn, Mass.-based iCAST, an online entertainment company, as vice president, public relations. Zakim will work out of iCAST's New York City office and was most recently vice president, corporate promotion for Chicago-based Playboy Enterprises ... Los Angeles-based ShowBIZ Data, an entertainment business-to-business portal and provider, has appointed **Keith Teruya** chief technology officer. Most recently Teruya was a consultant to both ShowBIZ Data and Digital Savant (recently acquired by ShowBiz Data) ... San Francisco-based Imagine Media appointed **Jared Cantor** eastern director of sales and business development. Cantor served as a senior account executive at the New York-based World Wrestling Federation Entertainment's New Media division.—*Edited by Sid Ross*

CULTURE TRENDS

MTV's BUZZWORTHY

Buzzworthy songs are usually by new, up-and-coming artists who MTV believes have special potential. Of the videos designated as Buzzworthy, the vast majority have been certified gold or platinum.

Week of 9/18/00

Artist/Group: **Radiohead**
Song/Video: **"Kid A"**
Album: **Kid A**

The first "single" from the band's highly anticipated follow-up to the critically acclaimed *OK Computer* - to be released October 3. Radiohead has decided to go the un-conventional route by not picking singles from the record - leaving that task to radio programmers. Rumor has it that *Kid A* is practically an anti-rock album - with the guitars turned down to a whisper. But with the state of things in rock music today, can you blame them? Thank god for Radiohead.

Artist/Group: **Fuel**
Song/Video: **"Hemorrhage"**
Album: **Something Like Human**

The first single from the sophomore release from the Pennsylvania rockers. Scored some pretty decent radio-play with their first record.

The Hollywood Reporter's Box Office

For weekend ending September 18, 2000

This Week	*Last Week*	*Picture*	*3-Day Weekend Gross*	*Days In Release*	*Total Gross Sales*
1	1	The Watcher	5,805,680	10	17,376,895
2	New	Bait	5,485,591	3	5,485,591
3	3	Bring it On	5,084,580	24	50,935,610
4	2	Nurse Betty	4,658,762	10	13,552,543
5	5	Space Cowboys	2,515,232	45	82,202,221
6	4	The Cell	2,448,021	31	54,985,122
7	6	What Lies Beneath	2,406,524	59	145,578,552
8	New	Almost Famous	2,314,646	5	2,376,387
9	34	Scary Movie	2,039,085	73	151,771,492
10	New	Duets	2,002,588	3	2,002,588
11	7	The Art of War	1,553,230	24	27,378,910
12	8	The Original Kings of Comedy	1,537,461	31	34,013,542
13	11	The Replacements	1,384,541	38	41,022,781
14	12	Nutty Professor II: The Klumps	1,219,740	52	118,545,210
15	9	The Way of the Gun	1,217,915	10	4,253,728
16	10	Highlander: Endgame	1,103,196	17	10,804,448
17	14	Coyote Ugly	1,003,196	45	56,717,183
18	13	Autumn in New York	945,789	38	35,445,797
19	15	Saving Grace	896,914	45	9,691,210
20	16	The Crew	670,811	24	11,877,369
21	19	The Perfect Storm	543,376	80	179,419,774
22	24	Gladiator	518,144	136	184,986,532
23	18	Hollow Man	490,265	45	72,055,301
24	22	X-Men	476,840	66	154,680,757
25	17	Bless the Child	469,332	38	28,134,407
26	25	The Tao of Steve	345,312	47	3,036,262
27	26	M:I 2	315,667	117	214,815,531
28	28	Chicken Run	276,101	89	104,933,101
29	--	Shaft	265,165	94	69,843,965
30	27	The Kid	254,661	73	67,748,872
31	23	Backstage	203,393	12	1,025,060
32	31	The Patriot	202,832	82	112,416,239
33	21	Turn it Up	195,027	12	1,120,891
34	32	Big Momma's House	190,980	108	116,761,472
35	39	T-Rex: Back to the Cretaceous	174,845	696	34,379,349

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CULTURE TRENDS

MTV Top 20 Countdown

Week of 9/18/00

1. **Mystikal** "Shake it Fast"
2. **Madonna** "Music"
3. **Nelly** "Country Grammar"
4. **Fuel** "Hemorrhage"
5. **Papa Roach** "Broken Home"
6. **Orgy** "Fiction"
7. **Disturbed** "Stupify"
8. **Janet Jackson** "Doesn't Really Matter"
9. **Incubus** "Stellar"
10. **Rage Against the Machine** "Testify"
11. **Red Hot Chili Peppers** "Californication"
12. **P.O.D.** "The Way I Am"
13. **Deftones** "Change"
14. **Green Day** "Minority"
15. **SR-71** "Right Now"
16. **DMX/Sisqo** "What You Want"
17. **Mya** "Case of the Ex"
18. **P.O.D.** "Rock the Party"
19. **Common** "The Light"
20. **Pink** "Most Girls"

The Billboard 200

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

This Week	*Last Week*	*Wks on Chart*	*Artist*	*Album*
1	1	11	LL Cool J	The Greatest...
2	3	16	Nelly	Country Grammar
3	2	17	Eminem	Marshall Mathers
4	4	50	Boyz II Men	Nathan Michael Shawn Wayna
5	8	25	Barenaked Ladies	Maroon
6	5	8	Creed	Human Clay
7	7	31	Britney Spears	Oops!...I Did it Again
8	9	20	'N Sync	No Strings Attached
9	-	1	3 Doors Down	The Better Life
10	6	2	Various Artists	Now 4

The Billboard Hot 100

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

This Week	*Last Week*	*Peak Pos.*	*Wks on Chart*	*Title*	*Artist*
1	1	1	8	Music	Madonna
2	19	2	7	Give Me One Night	98 Degrees
3	2	1	16	Doesn't Really Matter	Janet Jackson
4	3	3	21	Jumpin'	Destiny's Child
5	6	5	26	Kryptonite	3 Doors Down
6	4	1	23	Bent	Matchbox Twenty
7	5	1	15	Incomplete	Sisqo
8	7	7	23	Country Grammar	Nelly
9	9	9	9	Come on Over Baby	Christina Aguilera
10	11	10	21	With Arms Wide Open	Creed

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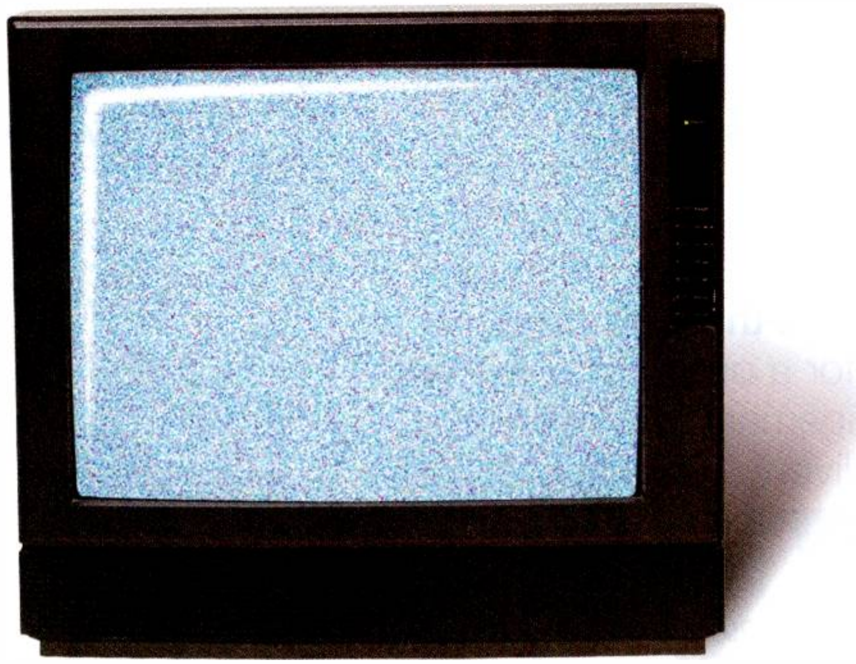

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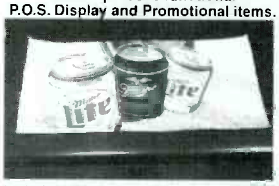

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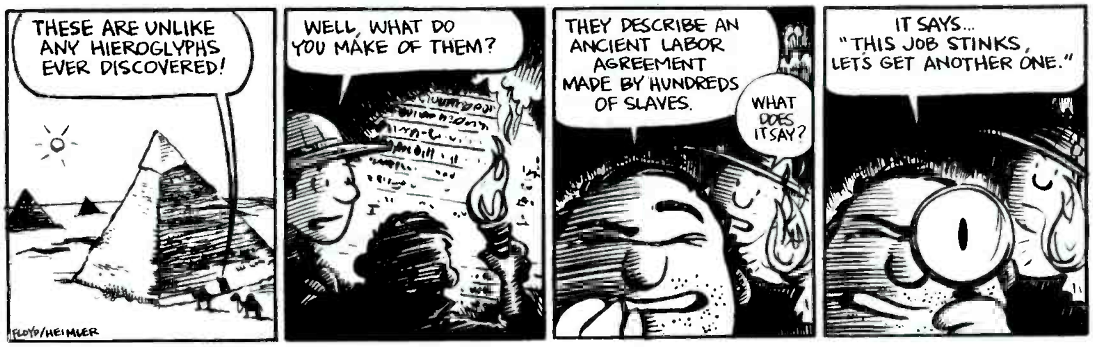

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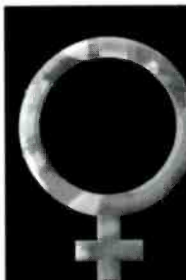

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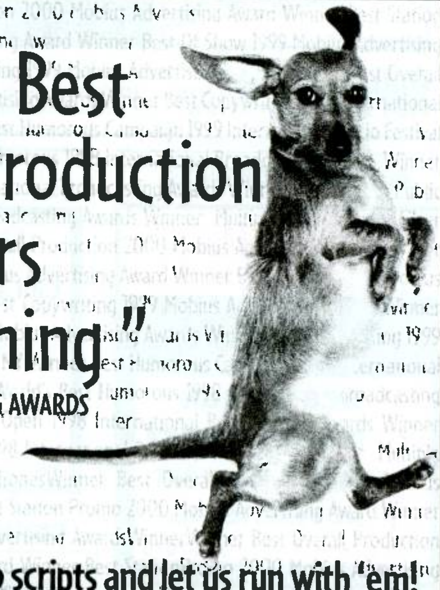

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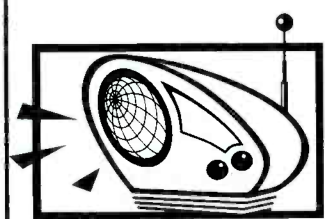

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Please fax resume to Mrs. Adams at: 212-206-3985

kate spade
NEW YORK

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The position requires a BA/BS degree in accounting or finance; 5-7 years' experience in accounting/finance in a related business, preferably at a managerial level; thorough knowledge of generally accepted accounting practices and principles, in-depth understanding of media sales and barter sales activity; strong knowledge of program stewardship reports and Nielsen ratings; a proven ability to manage, motivate and develop staff; and strong written and verbal communication skills. MBA strongly preferred.

Please send resume, along with salary history, to: **Warner Bros. Human Resources, Ref. #YAAW1001, 4000-D West Magnolia Blvd., PMB180, Burbank, CA 91505, or fax to (888) 309-5959, or e-mail to wbjobs@alexus.com.** Warner Bros. is an EOE. A Time Warner Entertainment Company.

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Chief, Advertising & Market Research Division, Supervisory

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Grade: GS-0301-15

Announcement Number: CO-0-0536

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westwayne

Ad Council

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ADVERTISING MANAGER

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Costa Mesa, California 92626
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Robby Markowicz
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5 Years Ago

The top-selling albums from **9/16/95**

1. Soundtrack/Dangerous Minds
2. Hootie & the Blowfish/Cracked Rear View
3. Alanis Morissette/Jagged Little Pill
4. Soundtrack/The Show
5. Bone Thugs-N-Harmony/Eternal...
6. TLC/crazysexycool
7. Shania Twain/The Woman in Me
8. Blues Traveler/four
9. Selena/Dreaming of You
10. Jeff Foxworthy/Games Rednecks Play

10 Years Ago

The top-selling albums from **9/15/90**

1. M.C. Hammer/Hammer Don't Hurt 'Em
2. Wilson Phillips/Wilson Phillips
3. Jon Bon Jovi/Blaze of Glory:Young Guns II
4. Mariah Carey/Mariah Carey
5. Poison/Flesh & Blood
6. Bell Biv Devoe/Poison
7. Anita Baker/Compositions
8. Keith Sweat/I'll Give All My Love...
9. New Kids on the Block/Step By Step
10. Soundtrack/Pretty Woman

Billboard Modern Rock Tracks

Compiled from a national sample of airplay provided by Broadcast Data Systems.

This Week	*Last Week*	*Peak Pos.*	*Wks on Chart*	*Title*	*Artist*
1	2	1	4	Minority	Green Day
2	1	1	24	Last Resort	Papa Roach
3	3	2	14	Stellar	Incubus
4	5	4	6	Hemorrhage	Fuel
5	4	3	19	Change	Deftones
6	6	2	19	Right Now	SR-71
7	9	7	9	Loser	3 Doors Down
8	11	8	4	Fiction	Orgy
9	7	1	16	Californication	Red Hot Chili Peppers
10	12	10	15	Stupify	Disturbed

Billboard Top Video Rental

Compiled from a national sample of retail store rental reports.

This Week	*Last Week*	*Title*	*Studio*
1	1	Erin Brockovich	Universal
2	2	The Cider House Rules	Miramax
3	3	Magnolia	New Line
4	-	American Psycho	Universal
5	12	Ghost Dog	Artisan
6	10	Titus	Fox
7	15	The Big Kahuna	Universal
8	8	The Ninth Gate	New Line
9	14	The Next Best Thing	Paramount
10	6	Romeo Must Die	Warner

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Media Person

BY LEWIS GROSSBERGER

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Oh, Limp Olympiad

MEDIA PERSON MUST REGRETFULLY ANnounce that the Olympics did not hold his interest this year, which, in his opinion, means they were (or possibly are—who knows whether they're still going on or not?) a complete failure. NBC was finally forced to admit that only six people have been watching its coverage, three of them complaining bitterly, proving once again that Media Person pretty much sets the tone for life in America today. ◆ Unfortunately, the reasons being cited for the low ratings—the late September start date, delayed coverage due to time difference, Internet competition, etc.—are all wrong. If we break down the Olympics into its component parts, we can easily recognize the root causes of the problem, though MP hates to have to drag botany into this discussion.

1. Sports: Are sports really as interesting as they're cracked up to be? Aren't they actually kind of silly? And also quite tedious to watch? Come on, admit it. Let's say you're 40 or 50 years old and male. (If you're younger or a woman, try to picture your father or uncle, if possible.) As a typical American, you've now watched an estimated 16 billion hours of sports, which, let's face it, essentially consist of people endlessly repeating the same few motions: running, jumping, throwing things, kicking things or propelling themselves rapidly across a limited space by various means of locomotion, physical and/or mechanical. Aren't you getting pretty tired of the monotony by now? Media Person sure is. Thats why he's retired from spectator sports. (Except for boxing, where people try to bash each other's heads in or bite their ears, which is kind of exciting, what with the blood and all.)

We know that the television muck-a-mucks are aware of this problem, which is why they developed the Poignant Little True-Life Biodrama format for covering the Olympics and hired Dennis Miller to try to make football funnier. Unfortunately, the Poignant Little True-Life Biodramas, typically showing how some 19-year-old really got upset four years ago because she came in second, cried a little, blew her nose, ate Wheaties and is now really determined to come in first, are about as fascinating as Julie Whatsername interviewing the girlfriend of the latest banishee on *Big Brother*. Media Person says it's time we banned sports from the Olympics.

By Day One, MP was already sick of Australia, where everyone wanders around saying, "No worries."

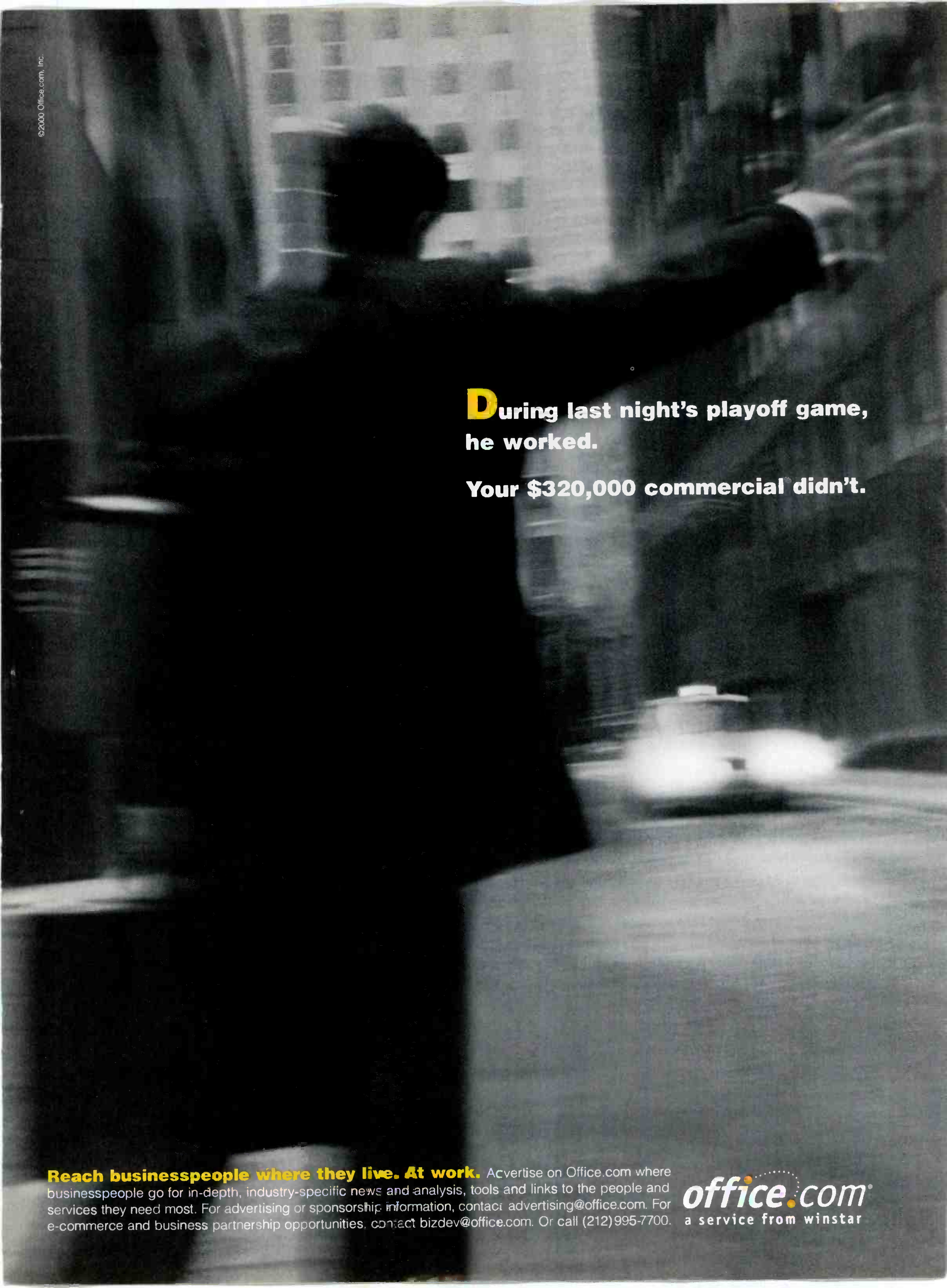
2. Pageantry: People wearing stupid hats and waving while walking around in a big circle shooting videotapes of other people doing the same. Doves cooing. One thousand crocodiles in tie-dyed capes forming the Olympic rings while Olivia Newton-John sings some tuneless song. This is the Miss America contest meets Leni Riefenstahl at EuroDisney. This is for people who think cheerleaders are entertaining. Get rid of it.

3. Nationalism: Enough already with countries! Countries were a good idea when they first came in around half a millennium ago, but by now they've outlived their usefulness. Lets stop talking about globalism and do it already. As the biggest and best country, it's up to the United States to take the lead. Dissolve the union! Let's all just be Earthlings! Then the Olympics won't be able to push its tiresome emphasis on Romanian gymnasts and Australian swimnasts and we can focus on the individual trigonometry champs and speed typists (don't forget, they won't be doing sports anymore), which is as it should be. And why does each Olympics have to be held in one country? By Day One, Media Person was already sick of Australia, where, we are constantly told, everyone wanders around saying, "No worries." As a catchphrase, that's even lamer than "g'day." MP could coin a better Aussie cliché with his eyes closed. For instance, how about, "Stick it in your wombat, mate!"? In the age of television and Internet, why can't every country host an event? Oops, forgot, there are no more countries. OK, every uh, area code.

4. Swimmers With Gigantic Feet: Obviously there is something unfair going on when mutants and space aliens are allowed to compete. This Thorpedo guy has size 17 feet, or flippers, actually, larger than those of any known human, which propel him with the speed of a frightened tuna. Apparently, he has escaped from some laboratory with a German professor chasing him, closely followed by a mob of villagers. Even worse, he wears a full-body condom. What's that all about? (as they say in New Zealand). If we must watch swimming, damn it, we want our swimmers naked, as God intended them. (Though, frankly, it's time we got rid of God, too, along with sports and countries. You can still pray for a victory if you like, just not to anyone.)

5. Winning: An obsolete concept. Cooperation, respect, inclusion, that's the ticket. Get rid of those tacky medals.

So there you have Media Person's modest plan for improving the Olympics. He's done his part. The rest is up to you. Everyone out there, send an e-mail immediately to Juan Antonio Samaranch and tell him to get moving on this. At first he will ignore you, but don't be disheartened. The revolution always starts slowly. ■



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