MEDIAWEEK

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Many large national marketers pledge they will maintain spending PAGE 6

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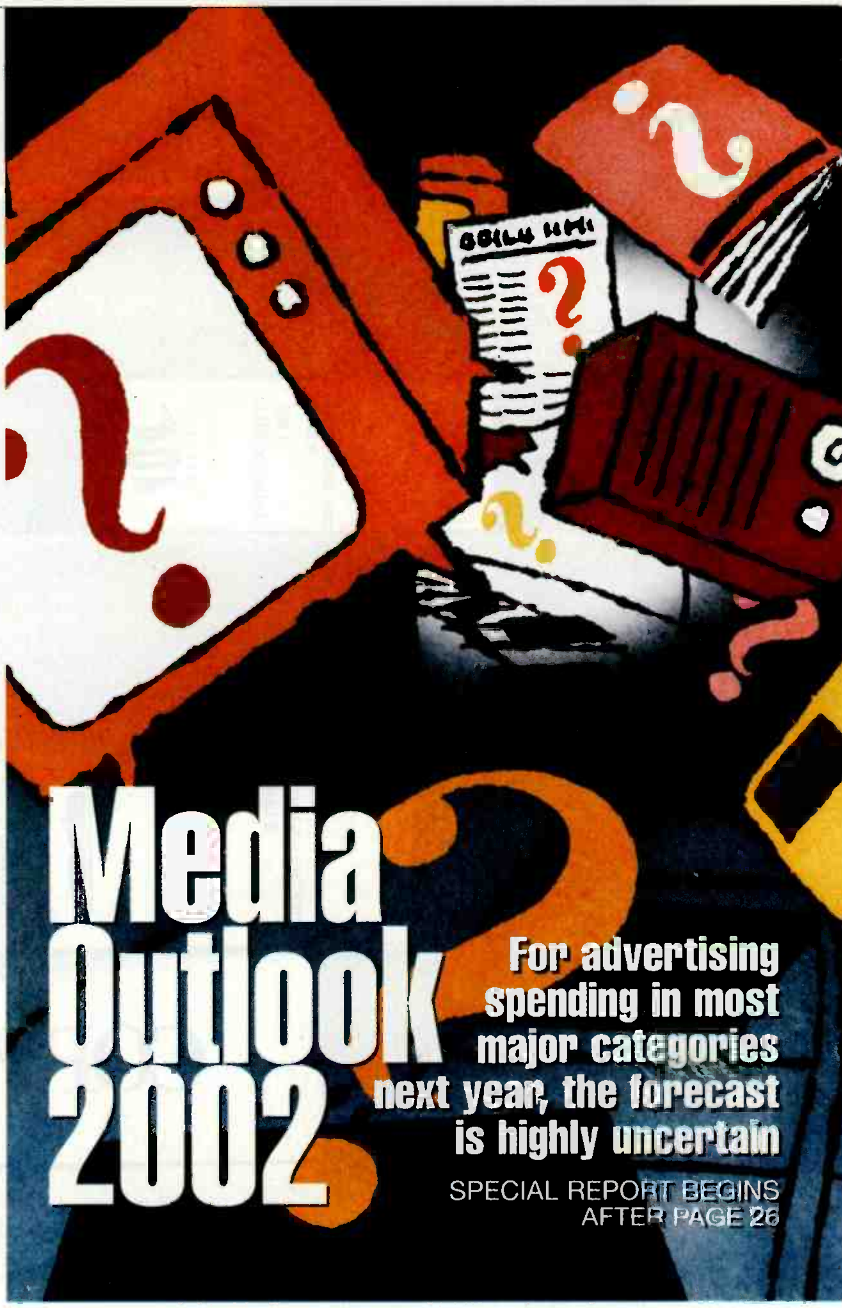

ED FOTHERINGHAM

MARKET INDICATORS

NATIONAL TV: BUSY
Nets scramble to find new slots for pre-empted ad time. Other than airlines, and some insurance and movie companies, most advertisers don't have immediate plans for cutbacks.

NET CABLE: SLOW
News nets, which lost millions in ad dollars due to nonstop crisis coverage, are slowly reinstating commercials. Fourth Qtr. open as negotiations cease.

SPOT TV: STALLED
Stations are scrambling to sort out inventory and re-express advertisers in the wake of the Sept. 11 terrorist attacks. Most major advertisers are returning to their spot schedules.

RADIO: SHIFTING
Cancelations leave September inventory wide open. Retail is uncertain, and most campaigns have moved to fourth quarter. In N.Y. and Washington, D.C., local advertising is replaced by banks and insurance and security companies.

MAGAZINES: SHAKY
Due to the attacks, buyers say that many clients are reevaluating their fourth-quarter print plans.


JIGSAW
MAD RIVER
TBWA/CHIAT DAY
APPLE COMPUTER, INC.
310-396-3333
DEMO REEL
10/13/00
RING OF FIRE
USHER
Apple Computer, Inc.
RavensWork
10/2/98
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WORK REEL
eleven
TBWA/CHIAT DAY
APPLE COMPUTER, INC.
DEMO REEL
10/13/00
COPPOS

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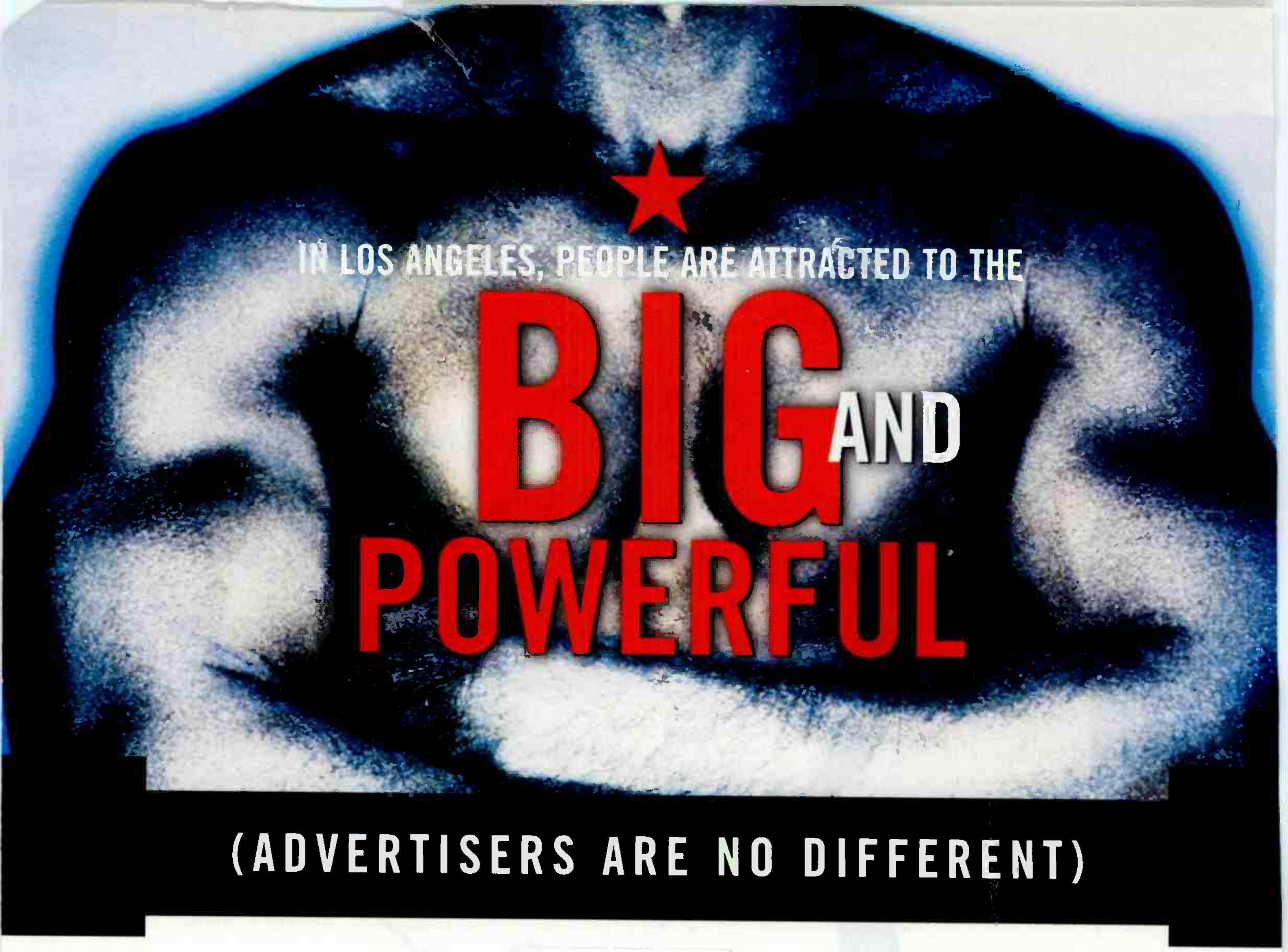

California. As the most populous state, it's also a state of change. Where big and powerful happenings, as well as people, are always making news. To cover all this, there's now CALIFORNIA, a new section that draws the attention of millions of Los Angeles Times readers every day. And with more news comes more advertising opportunities. So let us show you. After all, buying a single ad in the L.A. Times allows you to reach more L.A. DMA adults than a spot on any prime time television program...or a spot on any Top 5 radio station during drive-time...or any outdoor advertisement...or an ad in any national magazine or any national newspaper. What's more, you're reaching 82% of the affluent L.A. DMA adult newspaper readers. If you're attracted to the big and powerful, and who isn't, call today.

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Note: National magazines include People, Time, Newsweek, Vogue, Vanity Fair. Top 5 radio stations as of fourth-quarter 2000 Arbitron ratings include: KLVE-FM, KIIS-FM, KROQ-FM, KSCA-FM, KPWR-FM.
Sources: 2000 Market-Mate-TV Schedule Report/Los Angeles, Los Angeles Times 1/11/01, 2000 Los Angeles Scarborough Release 1 Study, Marketer's Guide to Media 2001, 2000 MRI Doublebase, 2000 Gallup Poll of Media Usage.

At Deadline

Laura K. Jones SEP 27 2001

Primedia, Hachette Install New Editors

Primedia and Hachette Filipacchi Magazines each replaced magazine editors last week. Anne Marie Iverson was named editor in chief of *Seventeen* and editorial director of Primedia's Teen Magazine Publishing unit, while Peter Herbst was appointed editor in chief of HFM's *Premiere*. Iverson, who left G+J USA's *YM* after only a year, replaces Patrice Adcroft. A successor at *YM* has not yet been named. *Premiere*'s former editor in chief Michael Solomon had been in place just 10 months. Herbst will also continue his current role as HFM associate editorial director.

Arbitron Surveys May Be Delayed

The release of the Arbitron Summer survey, scheduled to begin delivery Oct. 12, could be delayed by as much as a week due to disruptions in telephone service and mail delivery caused by the Sept. 11 terrorist attacks. For the Fall survey, which began Sept. 20, the radio-ratings company said there could be a small "shortfall" in the number of diaries used to calculate ratings.

Donaldson Starts Radio Gig Today

ABC News' Sam Donaldson today launches a daily talk radio show, *Sam Donaldson Live in America*, syndicated by ABC Radio Networks. Broadcast live from ABC's Washington, D.C., studios from 10 a.m. to noon EST, the show has been cleared on ABC's WMAL-AM in Washington, Clear Channel's KTRH-FM in Houston and on satellite radio. Other ABC stations are expected to air the show.

Nielsen to Issue Demos in Boston

Starting on Sept. 28, for the first time in a local market, Boston TV stations and cable systems will receive daily demographic ratings on a one-week delay from Nielsen Media Research's people-meter panel, currently in a demonstration period. Nielsen also said the people-meter sample has reached its target of 600 homes.

Media Fund-Raisers Multiply

TV stations across the country aired the Sept. 21 *America: A Tribute to Heroes* telethon, as did the broadcast networks and dozens of cable nets. Many media groups have also launched their own fund-raising efforts to aid victims of the terrorist attacks. Hearst-Argyle's 28 stations have collected $15 million through local telethons, led by Boston ABC affiliate WCVB, which has taken in $7 million for the American Red Cross so far. Sinclair Broadcasting's Portland, Me., CBS affiliate WGME-TV raised $700,000 for victims during a telethon on Sept. 18. Tribune's 23 TV stations and 11 daily newspapers have all staged fund-raising drives as part of a company-wide Disaster Relief Fund, which has been aided by a $2.5 million pledge from the McCormick Tribune Foundation. Scripps Broadcasting said five of its nine TV stations have raised more than $1 million for victims through phone-a-thons. And Gannett, owner of 22 TV stations and more than 100 daily newspapers, is donating more than $4 million in cash and advertising to the American Red Cross Disaster Relief Fund.

Inside

VIRGINIA SHERWOOD/ABC

ABC sales chief Mike Shaw: The TV market has seen "no wholesale pullout." Page 6

Trade Groups Rethink Fall Meetings

Several trade groups have canceled or postponed their industry meetings in light of the terrorist attacks. The Radio-TV News Directors Association canceled its Sept. 12 annual meeting in Nashville, Tenn. The Association of National Advertisers has canceled its Oct. 10-14 conference in Naples, Fla., and the American Association of Advertising Agencies postponed its creative meeting, originally set for Oct. 17-19 in San Francisco. But the California Cable TV Association's Western Show will proceed Nov. 27-30 in Anaheim, as will the American Magazine Conference, slated for Oct. 21-24 in Phoenix.

Mulligan Leaves Fox TV Chair

Brian Mulligan has resigned as chairman of Fox Television and will leave the company on Sept. 30, News Corp. said last week. Mulligan oversaw the Fox TV Stations group, Fox Sports, the Fox Cable Networks Group (FX, Fox Sports Net and Fox Sports Enterprises), Fox News Channel and the business operations of the Fox Broadcasting Co. He will remain as a consultant to the company. No replacement has been announced.

EW Focuses Issue on Attacks

With a sweeping Stars and Stripes cover, the Sept. 28 edition of Time Inc.'s *Entertainment Weekly* devotes the bulk of its editorial space to the terrorist attacks and the dramatic impact they had on American culture and the entertainment business. The tragic events pretty much consumed all weekly magazines *(see related story on page 47)*.

Corrections: In last week's issue, Todd Maisel's credit for a Page 4 photo of a fellow New York *Daily News* photographer was inadvertently omitted. In the Sept. 10 issue's Market Profile on Cleveland, the 2000 total in the Nielsen Monitor-Plus Ad Spending by Media chart incorrectly included outdoor ad revenue. The outdoor revenue should have been excluded from the total because Nielsen did not measure outdoor in Cleveland in 1999. The correct total for 2000 is $544,182,033.

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Arbitron Test Yields Spikes

PPM data shows TV viewership tripled on Sept. 11 in Wilmington

RESEARCH By Katy Bachman

Sept. 11 data from Arbitron's test of its portable people-meter device offers compelling evidence on how much out-of-home viewing may be missed by current TV ratings-measurement methods.

Arbitron reported last week that TV viewership in its portable people-meter test market of Wilmington, Del., jumped 350 percent on Sept. 11 compared to the previous three Tuesdays. Viewing levels rose rapidly at about 9 a.m. and did not return to typical levels until 11 p.m. Arbitron said that at least part of the high audience readings were attributable to people watching news coverage of that day's terrorist attacks while at work—viewership that is not accounted for with current methods.

"Obviously it's a small sample and preliminary, but it underlines the real potential of the PPM—the ability to capture real behavior that reflects what was happening simultaneously with TV viewing and radio listening," said Tony Jarvis, senior vp and director of strategic insights for Mediacom.

The radio industry also has its first sample of overnight audience results from Arbitron's PPM test. It's the first time the radio industry has not had to wait months to find out what happened to listening levels in an extraordinary situation. Compared to standard radio listener diaries, which must be mailed back to Arbitron and then processed to generate quarterly ratings, data from the portable people meter can be turned around overnight.

Arbitron reported that radio listening, which normally peaks at 8 a.m., jumped 23 percent in its Wilmington sample between 11 a.m. and noon on Sept. 11, when many businesses sent workers home early. The visual horror unfolding on TV then drew people to their sets, resulting in lower radio levels between 1 and 7 p.m., with the biggest dip between 3 and 4 p.m., when listening was 41 percent lower. After 9 p.m., listening returned to normal levels.

While TV has had overnight ratings for years, bringing them to radio "would change the way programmers think about everything they do," said Don Kelley, group director of programming for Greater Media. ■

Advertisers: We W

Many of the largest national marketers say they plan to hon

Despite dire forecasts of precipitous cutbacks in advertising in the wake of the Sept. 11 terrorist attacks in New York and Washington, D.C., the people who actually spend the money, for the most part, plan to maintain their previously committed levels.

Although airlines and insurance companies have canceled their scheduled advertising, and while several advertisers pulled ads to alter sensitive content, most said they want to follow President Bush's suggestion that attempts be made to return to normal business activities.

"At this point, we have no plans to make any changes in our advertising levels," said Rex Conklin, manager of broadcast media for Sears, which spends more than $300 million annually in the TV advertising marketplace. "Right now, it will be business as usual. We plan to stay on the air and go forward as planned."

AT&T Corp. plans a similar strategy, according to Stephen Block, director of marketing communications for the telecom giant. "This tragedy has been very hard for our industry and for New Yorkers in particular," Block said. "Our goal is to help our customers get through this and now, more than ever, we have to be bullish in coming to our customers' support. We are staying committed to our advertising plans. There were some issues about the appropriateness of some of our ads, some creative issues, but we are scrambling to fix that."

In radio, AT&T has pulled spots in 130 markets but is crafting new creative with the intention of reallocating the ad dollars in the fourth quarter. Overall, AT&T is "not looking to add to the economic spiral by pulling our ads," Block said.

Kaki Hinton, senior director of advertising services for Pfizer/Warner Lambert, said it also will be business as usual for the company's consumer products division, including its broadcast buying. "We did our upfront buying, and while budgets always change a bit, we are not making any significant cuts as a result of this horrible tragedy. We need to get on with our advertising and delivery of our marketing plan."

Gap Inc., which owns The Gap, Banana Republic and Old Navy stores, also has not altered its fourth-quarter ad plans and will go forward with its scheduled holiday ad campaigns, a company representative said.

MasterCard is another company that plans to stay on the air with its TV commercials.

For the Networks, 'A Fall Season Unlike Any Other'

Flash back to two weeks ago, and the highly anticipated start of TV's prime-time season was just seven days away. New shows, season premieres, resolved cliff-hangers—the works—were all set to begin on Sept. 17. But Sept. 11 changed everything. For the first time since President Kennedy's assassination in November 1963, scheduled programming on the broadcast networks was pre-empted for four consecutive days (Sept. 11-14) for news coverage.


NBC PHOTO
NBC's Zucker

Because only limited series programming aired during the week of Sept. 10, Nielsen Media Research last week did not issue its customary report on the networks' weekly rating averages and series rankings. Nielsen did issue data on individual programs that aired with commercials. Nielsen also designated tonight as the official start of the new TV season.

Of course, the impending launch of U.S. military action means that even though the season begins tonight, premieres and subsequent episodes of many new shows could be displaced by breaking-news reports. "In the indefinite future, [we] must keep in mind that all shows are subject to last-minute pre-emptions for potential news updates," said Jeff Zucker, president of NBC Entertainment.

The continuing development of the war on terrorism will make judging the ratings performance of the fall season extremely challenging for the networks and for advertisers. "This is going to be a fall season unlike

ll Stay the Course

eir spending commitments

THE MARKETPLACE By John Consoli

Last Friday's extraordinary telethon was promoted extensively via TV spots, print ads and on Web sites.

"We will air commercials in non-news programming that have a message that is consistent with our brand and are mindful of the current state of affairs," a MasterCard representative said. On the print side, he said, "should a message and its timing seem out of place given the context of world affairs, we may look to donate our ad space to a related charitable organization—as was done with our *USA Today* window position." MasterCard is donating its daily ad window in *USA Today* to the Salvation Army and any other relief organizations that want to use it for as long as the need exists.

Indicative of that growing spirit of unity, one local D.C. advertiser, Vito Plumbing, also gave up its radio ad schedule to the Red Cross.

While the retail business is soft right now with low customer demand, national retail giant Home Depot is maintaining its ad schedule, according to Lou Schultz, chairman and CEO of Initiative Media. Coca-Cola, which pulled its TV ads for 10 days after the Sept. 11 attack, was scheduled to resume advertising over the weekend, with a new campaign featuring baseball star Cal Ripken, Jr.

Coke's archrival Pepsi, however, was not planning a long-range return to TV, stating last week that it will make decisions day-to-day.

Another company that pulled its corporate ads on the day after the attacks is Verizon, which is also evaluating on a day-to-day basis. "We felt our customers had more critical things to think about than phone service," a Verizon representative said. However, Verizon's wireless subsidiary has run some print ads because "wireless communications play a critical role in an emergency like this," the Verizon rep added.

A sizable number of other advertisers are planning to stick to their long-range commitments. According to a media buyer whose clients spend more than $1 billion in television annually, all but one of his 40 national ad clients have expressed a desire to maintain current TV ad commitments through the first quarter.

As far as the ad dollars the networks lost in the four days immediately following the attacks, when they went to round-the-clock news coverage, most are expected to be re-expressed in the fourth quarter. According to Mike Shaw, president of ABC sales, "9 out of 10 advertisers have said they will re-express." And as far as the future, Shaw said there has been "no wholesale pullout" by advertisers.

Shaw said that airlines have pulled their ads, as well as some insurance companies. Movie studios are week-to-week, depending on the type of film, he said.

The impact of the airlines cancelling their ads has been felt less by the broadcast networks than by local TV stations and newspapers, because most airline ads are price-and-date messages. Media buyers and network executives said the total dollar volume of national airline business, along with national travel and tourism advertising, amounts to about 2 to 3 percent of all national broadcast TV advertising.

Movie advertising is more critical—it is one of the largest categories for both broadcast and cable TV, as well as for newspapers. Last year, $934.2 million was spent by the studios on network TV ads alone, and through June of this year, the number totaled $503.5 million. When ads for movies get pre-empted or pulled, the networks and papers run the risk of losing those dollars completely because of the timeliness factor. If a week goes by, the effectiveness of running promos for a new film may become moot.

Conversely, if the studios are unable to advertise a movie premiere, they may delay it. "You have such a limited time to get awareness and interest up," said Tom Hollerbach, president/CEO of BBDO West, which handles MGM. "If programming is pre-empted to a significant degree, it will have a definite impact on the openings of many movies."

Much like appropriateness questions raised by some advertisers about their commercials, some studios have also deemed the storylines of movies scheduled for rollout inappropriate at this time and have delayed them. Warner Bros. and Disney have postponed the fall releases of two films, *Collateral Damage* and *Big Trouble*, respectively.

In radio, while Coke, McDonald's, Budweiser, Toyota, Lexus and Nissan, along with the airlines, all pulled their ads initially, most, as in TV, are re-expressing those dollars into the fourth quarter. And by late last week, all were back on the air, resuming planned schedules.

"We pushed some advertising back, and thought it better to stay out of the environment for a while, but we're not cutting back, just shifting," said Janet Cerrato, director of local

[redacted]

any other fall season," Zucker said.

Advertisers should "never form an opinion [on a new season] based on early ratings results," added Brad Adgate, senior vp of research at Horizon Media. "But considering the circumstances right now, it's anyone's guess how recent events will impact upcoming audience levels for entertainment programming."

CBS already has felt some negative impact. While the network's lineup of original programming last Wednesday (Sept. 19) won the night, only the season premiere of *60 Minutes II* (with a rare time-period–winning 4.0 rating/12 share among adults 18-49 at 8 p.m.) posted favorable results. Both *The Amazing Race* at 9 p.m. (which attracted fewer viewers than the show's Sept. 5 premiere) and the debut of *Wolf Lake* (which finished third, behind a repeat of *Law & Order* on NBC and ABC's *20/20 Downtown*) lagged considerably.

The entertainment programming pre-emptions during the week of Sept. 10–16 extended Nielsen's 2000-2001 TV season to an unprecedented length of 53 weeks, ending last night. This past weekend, in fact, ratings from four high-profile shows—ABC's *Miss America Pageant* on Saturday; the debut of CBS' *The Education of Max Bickford*, the expanded season opener of ABC's *The Practice* and *50 Years of NBC Late Night*, all on Sunday—were no longer eligible to be counted as part of the new 2001-02 season.

"For us this posed no concern," said Kelly Kahl, CBS senior vp of program planning and scheduling. "We always air original programming the Sunday prior to the start of the season to whet viewer appetites."

broadcast for Verizon.

While some insurance companies pulled their national advertising, companies including State Farm and The Hartford were running information-based spots in both New York and Washington. The nation's capital was also heavy with radio spots from security companies and gun stores.

Like local radio, TV stations also had some advertisers temporarily pull ads, but many were coming back. "Business is coming in," said Ed Goldman, vp and general manager of Viacom's WBZ and WSBK in Boston. "Anytime you have conflict, the marketers react, but advertisers come back. The expectation is that normalcy will be back." Goldman said there has been increased activity for his two stations in automotive and retail, two categories that normally cut back during times of turmoil. "We're seeing chunks of business coming in for fourth quarter, not just dribs and drabs," he said.

"We haven't had any cutbacks," said Bonita LeFlore, executive vp and director of local broadcast for Zenith Media, which does local TV buying for M&M/Mars and Toyota/Lexus.

(*For a report on how the attacks have affected magazine advertising, see page 43.*)

The re-expressing into fourth quarter of most of the $160 million pre-empted national broadcast advertising from the four days following the terrorist attacks has tightened up scatter a bit. But fourth quarter was only about 65 percent sold, so pricing is expected to remain level. "There is still 30 percent of commercial time available to be sold, so things haven't tightened that much," said one media buyer. Another buyer reported that the broadcast networks are selling fourth-quarter scatter at about the same rates as were charged in the upfront, or a bit lower. But scatter deals were scarce last week, as most nets and buyers were concentrating on reallocating displaced ads.

"Scatter buys are going to come closer to air dates because right now everyone is busy moving ads around," said ABC's Shaw. "Some advertisers bought program premieres that were pre-empted, and now the time is not available on the new dates. We're busy working to accommodate them."

And the pre-emptions are going to continue. Last Friday, for example, the television telethon *America: A Tribute to Heroes*, staged to raise money for the relief effort, was aired across all the broadcast networks and most of the cable nets, pre-empting for a second week the premiere of the WB's new Friday-night sitcom lineup along with entire nights of advertising for all the networks that carried the telethon. That ad time now also has to be shifted into new future slots. *—with Katy Bachman, Alan James Frutkin, Megan Larson and Jeremy Murphy* ■

Mobilizing for War

Networks dispatch crews to Middle East in effort to penetrate Afghanistan

TV NEWS **By Megan Larson and John Consoli**

As the United States prepares for the possibility of war, the major news networks have taken taken battle positions domestically and in Central Asia to cover the story. It's been a decade since they have had to marshall their resources on such a massive scale, during which time the broadcast networks practically gutted their foreign news bureaus. Back in 1991, two of the three 24-hour cable news channels, Fox News and MSNBC, didn't even exist.

CNN lost its first correspondent in Kabul last week when the Taliban expelled Robertson.

CNN arguably is best positioned should war break out in Afghanistan. Having established itself during the Persian Gulf War a decade ago as a global newsgathering power, the network currently has a crew of four in Northern Afghanistan, with correspondent Steve Harrigan reporting; but since Tuesday, it has been increasingly difficult to access the area of the country controlled by the Taliban. CNN's Nic Robertson, who has been following the Taliban for almost three years and reported from Kabul on Sept. 11, was ordered out of the country and headed to Pakistan last week. Overall, CNN has 60 people in addition to the staff at its 10 bureaus in and around Central Asia and is looking to double its forces in Afghanistan soon.

CNN's news chief Eason Jordan believes the use of satellite video-phone technology has allowed several networks to report live without the burden of heavy camera equipment, a move that helps contain expenses a bit. But overall, costs will skyrocket, admits Jordan, to "many more millions of dollars than we had counted on spending."

The news networks may have it hardest, since they all slashed their news budgets. But news watchdogs believe fiscal conservatism in the face of a major news event won't win out. "It's inconceivable to me that any group that fancies itself a serious news organization wouldn't devote every resource to covering this story," said Andrew Tyndall, president of *The Tyndall Report*, a newsletter that analyzes network news.

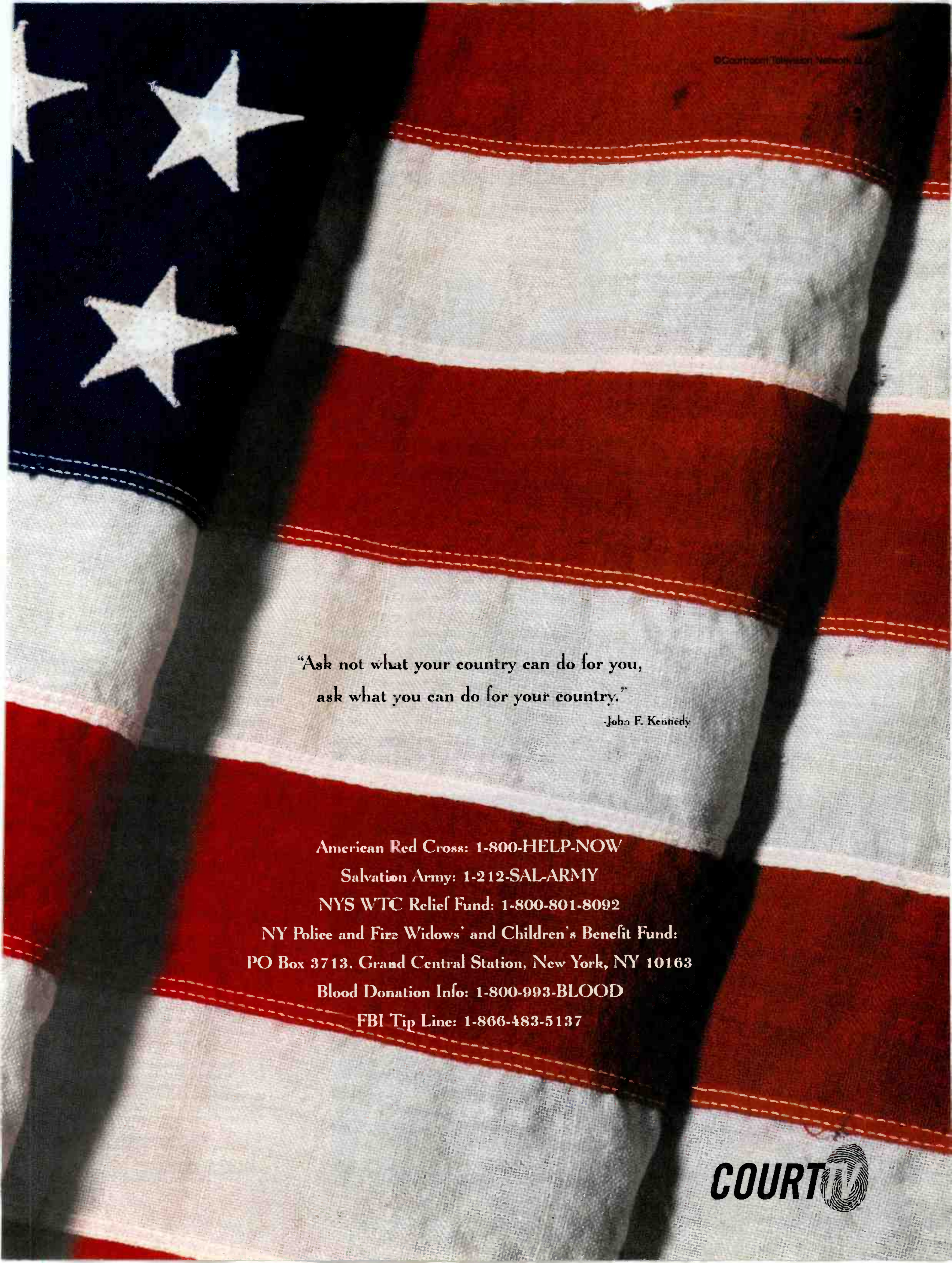
Indeed, journalists have been shipped off to Afghanistan and neighboring countries in droves. NBC News correspondents Bob Arnot and Keith Miller are already in Pakistan, and MSNBC's Ashleigh Banfield left on Sept. 23 to join Arnot. CBS and ABC also have two teams in Pakistan. CBS sent correspondent Allen Pizzey and a crew from its Rome bureau to the capital Islamabad the day after the attacks, while ABC sent correspondent Bob Woodruff from London. Two days later, CBS sent Richard Roth, and ABC shipped off Hillary Brown. Marci McGuiness, CBS News vp of news coverage, said the network has also sent a team into Northern Afghanistan via Tajikistan, in the region controlled by rebel forces who oppose the Taliban.

Fox News Channel has two teams in Pakistan but is still awaiting press visas that will allow them entry into Afghanistan. "In time of conflict it takes about 10 days to be granted a visa, but I have a feeling this could be different," said John Stack, vp of newsgathering.

This will be the big test for FNC, which at five years is the youngest of the nets. "It could be hurt because of its style of reporting, which is more talking heads, driven not by producers but by talents," said Tyndall. Stack is confident the network can ably cover the crisis here and overseas. "We're proud of our prime-time schedule, but we proved we're capable of field newsgathering during our presidential-election coverage last year," he said.

For now, all the news operations are waiting to see where fighting will break out. "There's no sense deploying people to a place until we know what type of military operation it'll be," McGuiness said.

At press time, there was no word on the formation of a Defense Department national media pool that would accompany U.S. forces. The media-pool concept, instituted in 1985, consists of a limited number of TV, newspaper, newsmagazine, wire-service and radio reporters who are secretly escorted by military personnel as close to battle as possible. ■


"Ask not what your country can do for you,
ask what you can do for your country."
-John F. Kennedy
American Red Cross: 1-800-HELP-NOW
Salvation Army: 1-212-SAL-ARMY
NYS WTC Relief Fund: 1-800-801-8092
NY Police and Fire Widows' and Children's Benefit Fund:
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Blood Donation Info: 1-800-993-BLOOD
FBI Tip Line: 1-866-483-5137
COURT TV

Paying Tribute to Heroes

Hearst retools *The Bravest* in wake of WTC attacks; stations eye upgrades

SYNDICATION **By Daniel Frankel**

Having extensively profiled two New York City rescue fire companies just weeks before both units rushed to the rescue during the Sept. 11 terrorist attacks on the World Trade Center that claimed the lives of more than 300 firefighters, the Hearst Entertainment weekly reality series *The Bravest* may emerge as one of the new season's most anticipated syndie program launches.

Premiering this coming weekend in 96 of the top-100 markets, *The Bravest* is an hour-long reality series in the tradition of Twentieth Television's *Cops*, with the subjects being firefighters and other urban-rescue personnel.

Because 7 members of Brooklyn's Rescue 2 and 11 members of Manhattan's Rescue 1—both of which are the focus of much of the show's first season—are missing in the WTC collapse, the series' premiere is being retooled to pay tribute to the fallen firefighters. And in light of the sad events, some stations are moving *The Bravest* to more-visible time periods.

"We're definitely looking to upgrade it," said Tracy Letize, programming director for WBFS-TV in Miami, a UPN affiliate that currently has *The Bravest* slotted for Sundays at 1 a.m. Joanna Dubois, programming director for New Orleans UPN affiliate WUPL-TV, said that since the WTC tragedy has sparked public interest in the dangerous job firefighters do,

HEARST ENTERTAINMENT

The Bravest **profiles New York City firefighters.**

her station has given *The Bravest* a solid 10 p.m. time slot on Saturday nights.

Rob Corona, senior vp of domestic distribution for Hearst Entertainment, said he's been careful and respectful in dealing with stations.

"I have no qualms about doing a tasteful update to our first show. If we simply ignored [the attacks], it wouldn't have been right," said Corona. Hearst is devoting 30 seconds of its barter inventory in the first episode to call for donations to the Uniformed Firefighters Association Widows' & Children's Fund.

"I don't think it's possible, given the devastation to New York City firefighters and the amount of time we spent with them, not to acknowledge [the tragedy]," said Russell Best, the show's executive producer and creator. ■

News Pre-emptions Jolt Ratings for Syndie Premieres

With many new syndication strips rolling out to meager ratings in the aftermath of the Sept. 11 terrorist attacks, both syndicators and stations say there is little, if any, reliable data available to assess their launches. Eleven new strips have premiered since Sept. 10.

Moira Coffey, executive vp of research for King World Productions, said the practice of analyzing Nielsen Media Research overnight ratings for these programs from 51 metered markets "was completely thrown out the window on Sept. 11." Network news pre-emptions have had the biggest impact. King World's *The Ananda Lewis Show* and NBC Enterprises' *The Other Half* were off the air for most of their premiere weeks. On-air promotions for most shows disappeared.

Based on ratings for Sept. 17, the premiere date for six first-run series, Twentieth Television's *Texas Justice* led the newcomers with a 2.0 rating/6 share in households, down from a 2.3/7 for its lead-in and a 2.1/7 from its year-ago time-period averages.

Following *Ananda*'s disappointing premiere, distributor King World said last week that it will relaunch the show in early October, backed by expanded radio promotion. *Ananda* premiered Sept. 10 with a 1.5/5, 38 percent below its lead-in and year-ago time-period averages in share.

There are no such relaunch plans for *The Other Half*, which earned a 1.5/6 on Sept. 10, flat with its year-ago benchmarks. "What if we go to war in the middle of a [relaunch]?" asked Ed Wilson, president of NBC Enterprises. "I don't think any of us can make predictions on the stability of the marketplace right now." *—Daniel Frankel*

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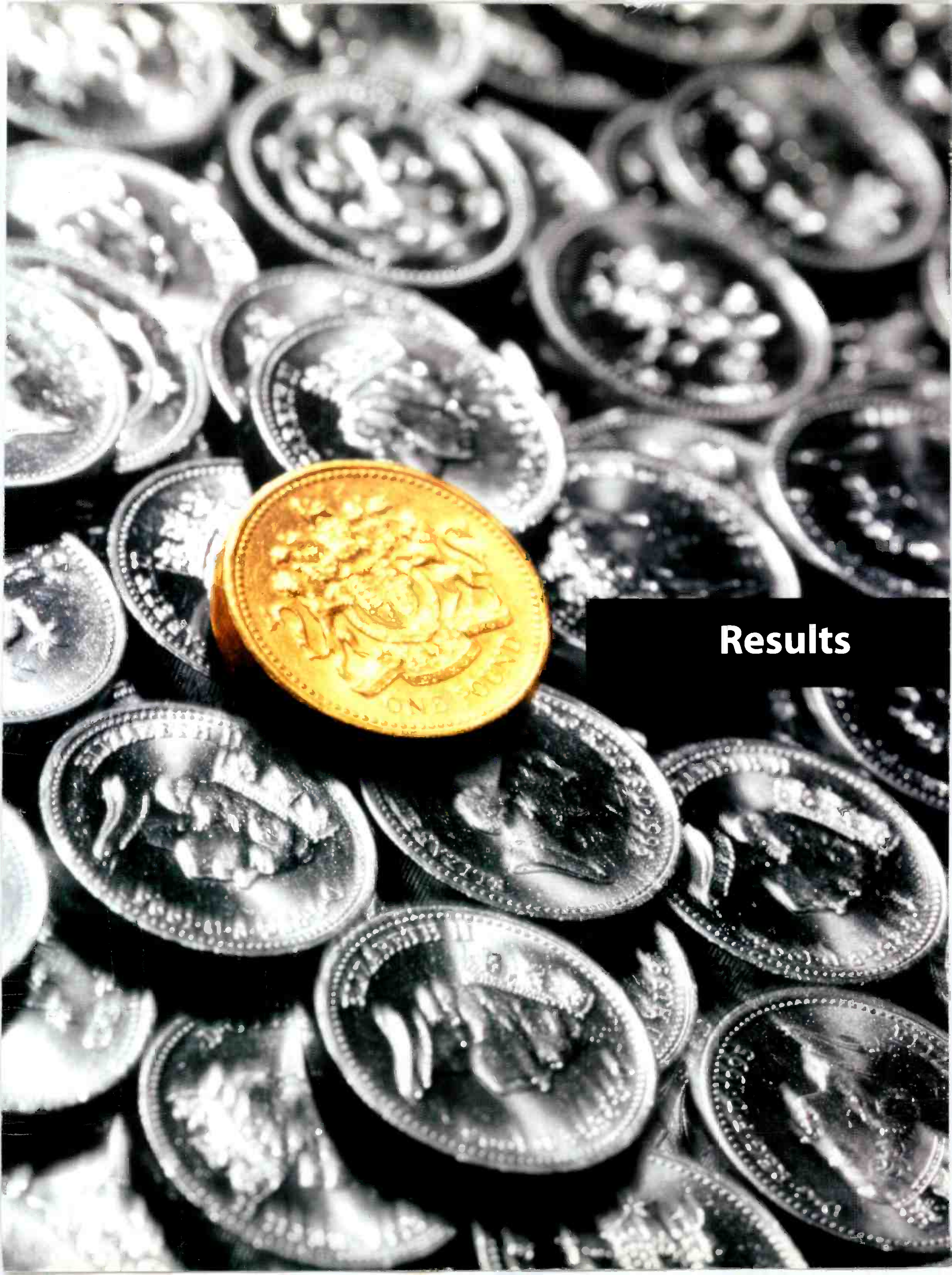


Results

TV STATIONS

Affils Rush to Cover Impact on Hometowns

BY JEREMY MURPHY

Within hours of the horrific Sept. 11 terrorist attacks on the United States, Boston's Sunbeam–owned NBC affiliate WHDH-TV had dispatched reporters to New York and Washington, scrapped a week's worth of programming for news coverage, and started building an elaborate "Attack on America" set in its newsroom. In the following days, anchors and reporters provided close to 12 hours a day of local coverage.

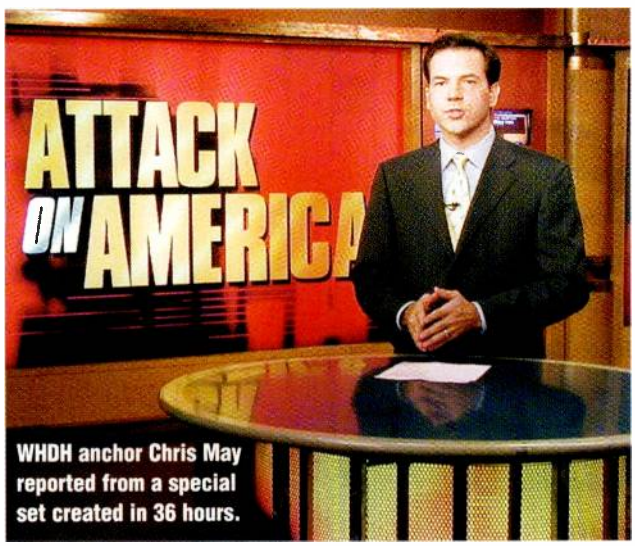
"Covering this story has been one of the biggest challenges for everyone in the newsroom," said Ed Kosowski, WHDH's news director. Boston was the origin of the two most deadly attacks, and many of the passengers on board the airplanes were from the Boston area. Kosowski estimates the station has spent "tens of thousands of dollars" covering the story, which helped yield some quality coverage. WHDH broke news of an FBI raid at the Copley Westin Hotel the day after the attacks. The story was run nationally.

But WHDH is no exception. Across the country, hundreds of stations have struggled to cover the enormously tragic news. Thousands of reporters and camera crews have been dispatched to New York and Washington. On the home front, stations continue to chase after local connections, which are popping up in Boston, South Florida, Dallas and Los Angeles.

Most Big Four stations and affiliates didn't resume airing commercials until the weekend after the attacks, costing their owners millions in lost ad revenues, not to mention the expenses in covering the tumultuous events and their aftermath.

In Miami, NBC's owned-and-operated WTVJ-TV intensified its coverage when authorities disclosed several startling local connections.

"The terrorists trained here, they lived here, they designed their plots here—it's been a significant story for us." said Don Browne, president and general manager of WTVJ.



WHDH anchor Chris May reported from a special set created in 36 hours.

WTVJ and its competitors—CBS O&O WFOR, Post Newsweek's ABC affiliate WPLG, Sunbeam's Fox affiliate WSVN, Univision's WLTV and Telemundo's WSCV—have all blanketed the airwaves with local coverage since the attacks. WTVJ's investigative unit uncovered the first two photos of the hijackers (which were used by media outlets around the world), while WFOR tracked down photos of 10 of the hijackers who had lived in South Florida.

WTVJ also uncovered a connection to Hamburg, Germany, and sent a network stringer to investigate the lead ahead of even the local authorities.

Los Angeles stations also found themselves dealing with a grim local connection—three of four of the flights were scheduled to arrive at LAX. "There were local people on those planes," said Erin Dittman, spokeswoman for KNBC. Reporter Doug Kriegle was vacationing in New York when the attacks happened and was able to cover the scene live for KNBC from the start (reporter Chuck Henry and a crew later drove cross-country).

Stations in Dallas found themselves close to the events when two suspected accomplices in the attacks were detained in Fort Worth carrying large amounts of cash and the same type of box-cutters allegedly used in the hijackings. Stations have chased that angle relentlessly, but Belo's Texas cluster of stations has had the advantage. "We have shared a tremendous number of resources," said Dave Muscari, creative director for Belo's ABC affiliate WFAA.

WFAA reporter Valorie Williams broke news about suspects linked to the terrorists living in the Dallas–Fort Worth area. The *Dallas Morning News*, Belo's largest daily newspaper, provided more in-depth coverage of Williams' scoop in the following day's edition. In addition, Belo has used its Austin ABC affiliate KVUE, Houston CBS affiliate KHOU, San Antonio CBS affiliate KENS and regional cable outlet Texas Cable News to cover the breaking story on the attacks.

TV STATIONS

Groups Facing Financial Concerns After Attacks

BY JEREMY MURPHY

The terrorist attacks on America continue to keep the nation glued to their TV sets, but the disproportionate audience gains won't help local broadcasters, who are already dealing with a soft economy. With so much ad inventory being scrapped for news coverage and with advertisers weary of putting commercials against grisly images, a bad year for local TV broadcasters looks like it just got a whole lot worse.

"We've lowered our estimates across the board for most media companies (in the wake of the attacks)," said Mike Kupinski, vp/analyst of media and entertainment for AG Edwards. "It's going to be a very difficult environment for TV broadcasters."

Competitive Media Reports estimates that

FOOTBALL IS WHY WE COVER FOOTBALL IN EVERY WAY POSSIBLE:

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ABC's Monday Night Football
SportsCenter
College Football Saturday
Sunday NFL Countdown
ESPN Radio
Bowl Championship Series on ABC
ESPN The Magazine
NFL PrimeTime
ESPN.com
Monday Night Countdown
ABC's College Football
Sidelines
NFL Wildcard Playoffs on ABC
ESPN GamePlan
NFL Films Presents
ESPN Bowl Week
NFL 2Night
Heisman Award Presentation
AFC-NFC Pro Bowl on ABC
Rites of Autumn
NFL Match-Up
College Football Thursday

TV stations in the top-100 markets lost a combined $27.8 million the day of the attacks, another wound for TV station groups still dealing with a dramatic cutback of national ad dollars. Many top-10 market stations lost more than $1 million in advertising, money stations will have little luck recouping as advertisers appear uneager to re-express. In fact, the devastating ad environment has put many pure-play broadcasters in a very tight financial pinch, and some of them may be forced to sell off their assets before a recovery begins.

"The TV-station market has been in the doldrums for the past four years, and this year it's being compounded by a recession in media advertising," said Keith Fawcett, a broadcast-media analyst with Merrill Lynch. Fawcett said cash flows for broadcasters—before the attacks—were down as much as 20-25 percent, and weren't expected to improve until the 2002 Olympics and elections started pumping money back into local markets.

For groups that were struggling before, it's going to get even worse now, analysts predict.

Benedek Broadcasting, owner of 23 network-affiliated stations, recently disclosed it will not be able to meet upcoming interest payments on its debt obligations, and that was before the attacks swept major advertisers off the airwaves. Credit analysts from Standard & Poor's recently downgraded the company's credit rating from a double C to a triple C, and the company has warned that it may have to sell several of its 23 stations to meet its debt payments. Benedek posted an 8.5 percent decline in second-quarter revenues.

Standard & Poor's also recently placed New York–based Young Broadcasting, owner of 12 local stations, on CreditWatch, fearing economic conditions will hamper the station group's ability to make its loan obligations. The company is in serious debt after buying San Francisco's NBC affiliate KRON from the Chronicle Publishing Company last year for $823 million. Young Broadcasting, owner of 12 network-affiliated stations, reported a net loss of $3.8 million for the third quarter. Revenues fell 13 percent, to $192.9 million, from $221 million the previous year. There has been much speculation that the company may be looking to sell KRON and KCAL to NBC and Disney, but executives deny any plans to liquidate any of its stations.

Granite Broadcasting, which secured the Bay Area NBC affiliation for its San Jose station KNTV, has also experienced financial trouble—big enough trouble to get analysts talking about the possible sale of its WB affiliates in Detroit and San Francisco. Granite, which owns nine local stations, recently posted a 19 percent drop in second-quarter earnings, and its stock price—which traded as high as $13 in 2000—dipped below the $2 mark earlier this month. The company's stock hovered just north of a dollar a week after the disaster. Even the promise of 2002 political money—expected to be bigger than 2000's presidential race—may not be big enough to rescue some station groups from their financial dire straits.

"Next year can't possibly be good enough to fix everything for a lot of these groups," said Tony Hoffman, of Hoffman Schutz Media Capital Inc.

Several groups were preparing for a tighter economy before the attacks occurred. The Ackerley Group, owner of 16 network-affiliated stations, recently negotiated a refinancing of its debt obligations, including a $120 million credit facility and $20 million three-year revolving credit line from Credit Suisse First Boston. The company reported a $15.2 million loss for the first quarter of 2001. And Fisher Broadcasting, owner of 12 network-affiliated stations (including Seattle's ABC affiliate KOMO), has instituted a 10 percent expense reduction, which will include trimming its 1,100 staff. The company recently posted a 20 percent decline for broadcast operations so far this year.

RADIO STATIONS

Outlets Weigh Playlists

BY KATY BACHMAN

At 8:48 a.m. last Tuesday, exactly one week after the first hijacked jet slammed into the World Trade Center, more than 50 New York stations joined ranks to play Ray Charles' 1976 recording of "America the Beautiful." In Washington, D.C., stations played "The Star Spangled Banner." For a while, maybe even weeks, radio stations across the country are unlikely to be returning to a normal programming schedule.

"God Bless the USA" crooner Greenwood entertained the Bushes and Cheneys at a benefit in January.

OWEN D.B./BLACK STAR

After stations pulled the obviously inappropriate tunes, such as Steve Miller Band's "Jet Airliner" or Metallica's "Search and Destroy," they have had a tougher call determining what else to keep off the air.

One list of 150 songs with questionable lyrics, messages, or tone got a lot of attention among radio programmers and the general press. The list, developed by Jack Evans, regional senior vp of programming for Clear Channel in San Diego, was hotly debated by stations and critics last week for some of the songs he suggested to be pulled: John Lennon's "Imagine," Simon and Garfunkel's "Bridge Over Troubled Water" or Don McLean's "American Pie." But Evan's list was not, as had been widely reported, a mandate from Clear Channel, which owns and operates 1,200 radio stations nationwide. "Clear Channel has not banned any songs from any of its radio stations," said the company in a prepared statement.

None of the 13 Clear Channel stations in San Diego followed the list to the letter, but it did stimulate a dialogue among programmers.

"We told our programmers that their job is to capture the moment, keep the audience informed, but allow them an emotional outlet," said Rick Cummings, vp of programming for Emmis Communications, which owns stations in New York and other large markets.

Like many stations around the country, WBMX-FM in Boston is playing country artist Lee Greenwood's 1984 recording of Irving Berlin's "God Bless the USA," a song that before Sept. 11 would never have made WBMX's playlist. Greenwood's Gulf War hit was played 4,267 times during the week of Sept. 10-16 on stations around the U.S., making it the most added and 19th-most played song, according to Broadcast Data Systems. Whitney Houston's rendition of "The Star Spangled Banner" was the second-most added song, followed by Enrique Inglesias' "Hero/Heroe."

Even though Lennon's "Imagine" is on Evans' list, he said it's a song that does need to be played. "Some songs that weren't right last Tuesday may be right next Tuesday," he said.

Market Profile

BY EILEEN DAVIS HUDSON


STEVE CHENN/GREATER HOUSTON CVB

Houston

WHILE MANY OTHER AREAS OF THE U.S. HAVE SUFFERED THE ILL EFFECTS OF THE SOFT-ening economy this year, Houston has largely remained on track thanks to the continued strength of its oil and energy businesses, led by giants Enron Corp., Reliant Energy and El Paso Corp. Unemployment in Texas' largest market has remained relatively low. But last week's announcement of massive layoffs by Continental Airlines (Houston's second-largest employer, with some 16,000 employees) is likely to have major implications for the local economy. And the pending acquisition of Compaq Computer (the market's third-biggest employer, with about 11,000 staffers) by Hewlett-Packard is also expected to result in bruising job cuts.

So far this year, the resilience of Houston's economy has generated strong demand for inventory on the market's broadcast TV stations. Ken Bielicki, vp/group media director at Fogarty Klein Monroe, a local ad agency, says some advertisers have been surprised that spot TV rates in Houston are not nearly as negotiable as they are in many other markets. "One of the things that we've been struggling with [is that] this market has not been as soft as others," Bielicki says. He notes that a tropical storm that flooded parts of the region in June, causing severe damage, helped stimulate consumer spending in the market. Residents were forced to replace ruined cars, home furnishings and other belongings.

While local TV inventory has been tight, business has been a bit slower this year for the Houston-Galveston radio market, 10th-largest in the country according to Arbitron. "Radio is a little bit soft right now—some stations that are normally sold out are not," says Grace Roman, media director with Love Advertising.

The local radio scene is dominated by Clear Channel Communications, whose eight stations generated nearly $129 million in revenue last year, representing a 38.4 percent market share, according to BIA Financial Network *(see Radio Ownership chart on page 18)*.

Radio One entered the market in summer 2000 by purchasing two highly popular Urban outlets. R&B/Hip-Hop KBXX-FM is the top station in the market among adults 18-34. Sister outlet KMJQ-FM has an Urban Adult Contemporary format that skews older.

While Radio One is largely unchallenged in Urban programming now, local media buyers expect Atlanta-based Cumulus Media, which has announced plans to enter the market, to launch a competitor to KBXX and KMJQ.

The Houston market has a young, diverse population for radio programmers and advertisers to target. About 35 percent of residents are aged 18-24, while another 44 percent are 35-54, according to Scarborough Research. The market is also about 22 percent Hispanic and 17 percent African American *(see Scarborough Research chart on page 20)*.

Earlier this year, locally owned Liberman Broadcasting acquired three stations in Houston. Liberman converted KTJM-FM from an Oldies format to Mexican. Liberman's Talk-formatted KSEV-AM recently hired several local personalities who had been on Clear Channel's News/Talk KPRC-AM. Clear Channel opted to air more national syndicated programming on KPRC, whose lineup includes Rush Limbaugh.

With the former KPRC hosts on board, KSEV has enjoyed a strong spike in the ratings, shooting up from an 0.4 share among listeners 12-plus in the Winter Arbitron book to a 2.1 in Spring. Meanwhile, less-local KPRC dipped from a 3.3 in the Winter book to a 2.4 in Spring.

Clear Channel's KTRH-AM has been the News/Talk/Sports leader in the market for three decades. CC's Soft Adult Contemporary KODA-FM is the market's top biller, taking in an estimated $32 million last year, according to BIA Financial Network. KODA also

NIELSEN MONITOR-PLUS

AD SPENDING BY MEDIA/HOUSTON

	Jan.-Dec. 1999	Jan.-Dec. 2000
Spot TV	$500,915,518	$517,974,561
Local Newspaper	$441,589,410	$389,226,560
Spot Radio	$144,721,430	$156,452,490
Outdoor	$33,314,188	$35,901,364
FSI Coupon	$14,444,150	$15,220,000
Local Sunday Supplement	$2,631,250	$2,533,620
Total	$1,137,615,946	$1,117,308,595

*Applies to packaged goods only Source: Nielsen Monitor-Plus

RADIO OWNERSHIP

Owner	Stations	Avg. Qtr.-Hour Share	Revenue (in millions)	Share of Total
Clear Channel Communications	3 AM, 5 FM	28.0	$128.7	38.4%
Infinity Broadcasting	2 AM, 2 FM	8.4	$43.6	13.0%
Radio One	2 FM	13.5	$40.0	11.9%
Cox Radio	4 FM	11.2	$34.8*	10.4%*
Hispanic Broadcasting	1 AM, 5 FM	10.7	$31.7	9.4%
Susquehanna Radio	1 FM	5.4	$21.0	6.3%
Liberman Broadcasting	1 AM, 1 FM	3.8	$7.6	2.3%
El Dorado Communications	1 AM, 1 FM	1.5	$3.7	1.1%

Includes only stations with significant registration in Arbitron diary returns and licensed in Houston-Galveston or immediate area. Ratings from Arbitron Spring 2001 book; revenue and owner information provided by BIA Financial Network. *BIA revenue and share data is for 2 Cox stations only.

typically leads the market in listeners 25-54.

Cox Radio also made its entry into the market in summer 2000. The group's four outlets include Country KKBQ-FM, the primary challenger to Infinity Broadcasting's market-leading Country outlet KILT-FM.

Infinity's other Country property, KIKK-FM, recently moved away from its more traditional playlist to a younger, more contemporary Country sound. The station's music now has more local flavor, featuring artists from around the state, and is branded as "Texas Country."

The demos of Country listeners are in such demand among advertisers in Houston that Infinity's four stations in the market (led by the two Country properties) command a 13 percent market share of ad revenue, second-highest in the market, even though the outlets' aggregate listener share is only a fifth-place 8.4, according to BIA.

Cox's '80s Hits outlet, KHPT-FM "The Point," over the past couple of years had received some strong competition from KHMX "The Mix," Clear Channel's Hot Adult Contemporary property. KHMX, which had played '80s artists during certain dayparts, this year shifted its programming to blend in Alternative fare, prompting some listeners to bail. In last Winter's Arbitrons, KHMX had a 3.2 share among listeners 12-plus. In the Spring 2001 book, the station's share dipped to a 2.3.

Spanish-speaking radio listeners have an array of choices in the market. Hispanic Broadcasting's KLTN-FM, which offers a Contemporary Hit Radio/Spanish format, has been Houston's No. 1 station in morning drive for the past three years, thanks to the popularity of host Raul Brindis.

"Because the market is less than 50 percent Anglo, ethnic advertising is really an important factor of both broadcast and print," notes Bielicki of Fogarty Klein Monroe.

Houston's broadcast television market ranks 11th in the U.S. with 1.7 million TV households, according to Nielsen Media Research. Tom Ehlmann, vp/general manager of KHWB-TV, Tribune Broadcasting's WB affiliate, says he expects Houston's growth track to propel the market into the top 10 in the next year or two. "The biggest news in this market is the economic news," Ehlmann says.

The local TV news race, long dominated by ABC's owned-and-operated KTRK-TV, has evolved into a three-way competition that includes Belo Corp.'s CBS affiliate KHOU and Post-Newsweek Stations' NBC affiliate KPRC. KTRK remains the market's top biller, generating an estimated $90.2 million in revenue in 2000, according to BIA. KHOU was a close second, with $86.3 million.

KHOU came out on top in all three evening and late-news time periods in the July Nielsen sweeps ratings (*see Nielsen chart below*). As the market's CBS affiliate, KHOU will air

NIELSEN RATINGS CHART

EVENING AND LATE-NEWS DAYPARTS, WEEKDAYS

Evening News

Time	Network	Station	Rating	Share
5-5:30 p.m.	CBS	KHOU	8.1	16
	NBC	KPRC	6.8	14
	ABC	KTRK	5.2	11
	UPN	KTXH*	4.6	9
	Fox	KRIV*	3.5	7
	Univision	KXLN	3.4	7
	WB	KHWB*	2.0	4
	Telemundo	KTMD*	0.7	1
	Pax	KPXB*	0.5	1
6-6:30 p.m.	CBS	KHOU	8.6	15
	ABC	KTRK	7.6	13
	NBC	KPRC	7.5	14
	Fox	KRIV*	5.5	10
	UPN	KTXH*	4.6	8
	Univision	KXLN*	4.4	8
	WB	KHWB*	2.0	4
	Telemundo	KTMD*	1.0	2
	Pax	KPXB*	0.3	1
6:30-7 p.m.	ABC	KTRK	7.6	13

Late News

Time	Network	Station	Rating	Share
9-9:30 p.m.	UPN	KTXH*	5.3	8
	Fox	KRIV	4.2	7
	WB	KHWB	1.6	3
9:30-10 p.m.	UPN	KTXH*	5.1	8
	Fox	KRIV	4.2	7
	WB	KHWB	1.6	3
10-10:30 p.m.	CBS	KHOU	9.0	15
	ABC	KTRK	8.9	15
	NBC	KPRC	8.0	13
	UPN	KTXH*	4.6	8
	Univision	KXLN	4.4	7
	WB	KHWB*	4.2	7
	Fox	KRIV*	3.4	6
	Telemundo	KTMD*	0.7	1
	Pax	KPXB*	0.9	1

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

the network's coverage of the Houston Texans, a National Football League expansion team set to begin play next fall. Reliant Stadium, a $350 million facility that will feature the only retractable roof in the NFL, is under construction in downtown Houston. Reliant is scheduled to host the Super Bowl in January 2004.

KHOU has won numerous journalism awards over the last year honoring the work of its 11 News Defenders investigative team, which broke the Firestone tires story. KHOU staffs a Mexico City bureau with a reporter and photographer who "cover Mexico stories that are relative to Texans," says KHOU president/gm Peter Diaz.

KHOU owner Belo and Time Warner Cable, the market's largest cable operator, are partnering to launch Houston's first 24-hour local cable news network in 2002.

Over at KPRC, just prior to last May's sweeps the station shifted to a three-anchor format on its 10 o'clock newscast. The station's 4 and 5 p.m. anchor, Dominique Sachse, added 10 p.m. to her duties, co-anchoring with Linda Lorelle and Bill Balleza. Lorelle also anchors a monthly prime-time newsmagazine KPRC has produced for the past three years, *Dateline Houston*, modeled on the NBC series.

KPRC recently created a nontraditional revenue unit. Roseanne Rogers, a former entertainment reporter, shifted to sales and now appears in and produces occasional custom-designed half-hour commercials for various local advertisers. "It gives us opportunities to attract advertisers that we wouldn't ordinarily attract," Steve Wasserman, KPRC vp/gm, says of the effort.

Just before the May sweeps, KHWB launched a half-hour newscast at 9 p.m. The program, anchored by Alan Hemberger and Sherry Williams, competes against the 9 p.m. news on Fox's owned-and-operated KRIV. While KRIV is still ahead in the 9 p.m. news race, in July both stations' ratings finished behind syndicated reruns of *Frasier*, which Viacom–owned UPN outlet KTXH double-runs at 9 and 9:30 p.m.

Viacom has agreed to swap KTXH to Fox as part of a large deal that also involves stations in San Francisco and Washington, D.C. If the deal clears regulatory hurdles, Fox will have a duopoly in Houston via its ownership of KRIV and KTXH.

At Univision Communications' powerful KXLN-TV, founding partner and general manager Adan Trevino retired in June. Craig Bland succeeded Trevino as gm.

KXLN's 5 and 10 p.m. local newscasts are the market leaders among viewers 18-49. The station's 5 p.m. news earned an average 3.3 rating in the July sweeps in 18-49, topping KPRC's average 2.9 in the demo. (KXLN's 5 p.m. news finished in sixth place in households, with a 3.4/7.) KXLN's 10 p.m. news earned a 4.7 in 18-49, edging out KPRC's 4.5.

Univision plans to launch a second O&O in Houston in January. The station, KHSH-TV, was acquired from USA Broadcasting and currently airs the Home Shopping Network. The two Univision outlets will not be sold in combination.

Telemundo Group's Galveston–based KTMD-TV also serves Spanish-language viewers in the market, although its ratings are well below those of KXLN. In May, KTMD lured away KXLN's lead male anchor, Roberto Repreza (KXLN replaced Repreza with Antonio Hernandez). KTMD officials could not be reached for comment.

Houston also has two Independent TV outlets—Johnson Broadcasting's KNWS-TV and locally owned KTBU-TV. KNWS this fall

SCARBOROUGH PROFILE

Comparison of Houston

TO THE TOP 50 MARKET AVERAGE

	Top 50 Market Average %	Houston Composition %	Houston Index
DEMOGRAPHICS			
Age 18-34	31	35	110
Age 35-54	41	44	108
Age 55+	28	22	77
HHI $75,000+	25	27	106
College Graduate	12	14	115
Any Postgraduate Work	10	9	90
Professional/Managerial	23	24	107
African American	13	17	136
Hispanic	12	22	179
MEDIA USAGE - AVERAGE AUDIENCES*			
Read Any Daily Newspaper	53	42	79
Read Any Sunday Newspaper	64	53	84
Total Radio Morning Drive M-F	22	22	102
Total Radio Evening Drive M-F	18	19	106
Total TV Early Evening M-F	30	28	93
Total TV Prime Time M-Sun	39	41	106
Total Cable Prime Time M-Sun	13	11	87
MEDIA USAGE - CUME AUDIENCES**			
Read Any Daily Newspaper	72	59	83
Read Any Sunday Newspaper	77	68	88
Total Radio Morning Drive M-F	75	76	101
Total Radio Evening Drive M-F	73	77	105
Total TV Early Evening M-F	71	64	91
Total TV Prime Time M-Sun	91	93	102
Total Cable Prime Time M-Sun	58	48	83
MEDIA USAGE - OTHER			
Access Internet/WWW	58	58	101
HOME TECHNOLOGY			
Own a Personal Computer	64	63	99
Shop Using Online Services/Internet	27	26	98
Connected to Cable	73	58	80
Connected to Satellite/Microwave Dish	14	20	139

*Media Audiences-Average: average issue readers for newspapers; average quarter-hour listeners within a specific daypart for radio; average half-hour viewers within a specific daypart for TV and cable. **Media Audiences-Cume: 5-issue cume readers for daily newspapers; 4-issue cume readers for Sunday newspapers; cume of all listeners within a specific daypart for radio; cume of all viewers within a specific daypart for TV and cable.
Source: 2000 Scarborough Research Top 50 Market Report (August 1999–September 2000)

NEWSPAPERS: THE ABCS

	Daily Circulation	Sunday Circulation	Daily Market Penetration	Sunday Market Penetration
Harris County: 1,190,931 Households				
Houston Chronicle	366,651	497,935	30.8%	41.8%
Montgomery County: 109,575 Households				
The Courier	10,862	12,174	9.9%	11.1%
Houston Chronicle	42,181	56,843	38.5%	51.9%
Port Bend County: 114,822 Households				
Houston Chronicle	36,659	47,267	31.9%	41.2%
Brazoria County: 82,626 Households				
The Brazosport Facts	16,631	17,681	20.1%	21.4%
Houston Chronicle	18,492	26,133	22.4%	31.6%

Source: Audit Bureau of Circulations

is launching reruns of *Mad TV* in syndication at 9 p.m. weekdays and is also picking up syndie reruns of *The Real World*. "We had some older programming, and we're trying to get younger," says Graham McKernan, KNWS vp/director of sales.

KNWS this season is airing 65 games of the Houston Astros, who last year moved from the Astrodome into the new Enron Field downtown. KNWS also carries Big 12 basketball; ratings for those games are expected to get a boost this winter from the debut of controversial coach Bob Knight at Texas Tech Univeristy.

KTBU's viewership skews older. The station's programming lineup includes syndicated fare such as *Matlock* and *Andy Griffith*.

Cable TV penetration in Houston is relatively low. Only 58 percent of the market is connected to cable, well below the 73 percent average for the country's top 50 markets, according to Scarborough. About 20 percent of the market's residents are connected to satellite TV services, compared to just 14 percent in the top 50 markets.

In January 1999, Time Warner and AT&T Broadband (then Tele-Communications Inc.) formed a joint venture for their cable systems in Houston and other parts of Texas, with Time Warner becoming the managing partner. The combined entity is called Texas Cable Partners LP. The companies' combined Houston base totals 650,000 subscribers, representing about 84 percent of cable homes in the market.

Time Warner inserts local commercials on 38 cable channels. Nov. 8 is the date the MSO will expand its offerings in Houston, launching multiple ISP service offering subscribers Earthlink, America Online, Road Runner and others, says Craig Thompson, vp/customer service for Time Warner Cable in Houston.

Media buyers do not consider Houston a particularly strong market for newspapers. Only 42 percent of the population reads a daily paper, well below the average of 53 percent in the top 50 markets. Total newspaper ad spending in the market declined almost 12 percent last year, to $389.2 million, according to Nielsen Monitor-Plus *(see chart on page 16)*.

Texas' largest daily newspaper, and the only major daily in Houston, is the Hearst Corp.'s *Houston Chronicle*. For the six months ended last March, the *Chronicle*'s daily circulation averaged 545,066, a 1.5 percent decline from the same period a year earlier. Sunday circ averaged 737,626, a 1.4 percent drop.

The *Chronicle* has made several changes in recent months, primarily in response to a readership study. The paper now includes at least one staff-written local obituary per day, usually focusing on people who were not public figures. There are more Page One enterprise stories on health, fitness, medicine, lifestyle and education topics.

In July, the *Chronicle* invited Hispanic community leaders in to discuss the paper's coverage of issues important to Hispanic readers. *Chronicle* managing editor Tommy Miller says the discussion generated "eight to 10 good story ideas" and a stepped-up effort to hire a regular columnist to cover the Hispanic community.

The paper plans to conduct such roundtable discussions with community groups at least three times a year. The next, slated for October, will focus on women, Miller says.

The *Chronicle* has expanded its coverage of Mexico and Latin America. Reporter Jena Moreno, who was on the business staff in Houston, is now based in Mexico City, focusing on economic and business issues. The paper also opened a Latin America bureau in Bogota, Colombia, staffed by John Otis.

Despite the *Chronicle*'s large circulation, the paper has a relatively low market penetration of just under 31 percent on its home turf in Harris County, according to the Audit Bureau of Circulations *(see chart at left)*. Advertisers who want to reach consumers via print have several other alternatives to consider, including publications that serve Houston's large Hispanic, African American and Asian communities. The oldest of the lot is the *Houston Defender*, a weekly black newspaper established in 1930. The competing *African American News & Issues* has a larger circulation, at more than 200,000.

Houston's out-of-home advertising business, which is somewhat restricted by local zoning regulations, has several competitors. The two largest are Viacom Outdoor and Clear Channel Outdoor. Viacom controls about 1,600 bulletin facings around the market and offers positions along major arteries, including the 610 Loop, I-10 and I-45.

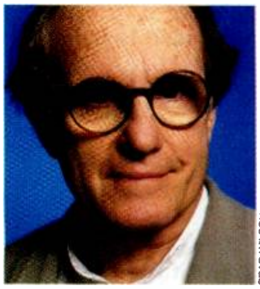
Clear Channel Outdoor operates about 650 bulletins and is the exclusive poster-panel provider in Houston, offering 2,700 30-sheet displays and 1,600 8-sheets.

Another significant player is Houston-based Sign Ad Outdoor Advertising, which has about 900 bulletins largely in the suburbs. Sign Ad has been in business since 1964. Lamar Advertising also has a limited presence in the market, along with several other local outdoor firms. ■

RADIO LISTENERSHIP

Station	Format	Avg. Qtr.-Hour Share Morning Drive, 12+	Avg. Qtr.-Hour Share Evening Drive, 12+
KLTN-FM	Contemporary Hit Radio/Spanish	7.6	3.2
KODA-FM	Soft Adult Contemporary	6.3	6.3
KMJQ-FM	Urban Adult Contemporary	6.3	5.1
KBXX-FM	Urban	5.5	7.4
KRBE-FM	Contemporary Hit Radio	5.4	5.8
KILT-FM	Country	5.2	5.5
KTRH-AM	News/Talk/Sports	5.0	3.3
KKRW-FM	Classic Rock	4.4	4.0
KSEV-AM	Talk	3.6	2.2
KLOL-FM	Rock	3.5	3.8

Source: Arbitron May–June–July 2001 Radio Market Report



BRAD WILSON

THE BLUNT PENCIL

Erwin Ephron

Godzilla Goes Cross-Platform

Whatever happened to "integrated marketing"?

The top 30 media companies, led by AOL Time Warner, Disney, NBC, News Corp. and Viacom, amassed revenue of close to $150 billion in 2000. They are now the dominant force in national advertising. These companies have used their market power to create cross-platform sales groups to sell large media packages to even larger advertisers. It's a great idea: Godzilla goes to market.

The success stories include the $160 million Toyota trifecta with AOL Time Warner, Condé Nast and Viacom Plus; Viacom's $300 million deal with Procter & Gamble; AOL TW's $100 million score with Bank America; News Corp.'s $100 million sale to Tricon. That's four. Not many other big ones have been announced, for in spite of the focus and publicity, cross-platform selling is less than 5 percent of the media business.

And there is strong evidence that the sales being made are driven by deep discounts and not by a new integrated approach to buying media. This is a complete about-face from the original selling concept.

When it first appeared four years ago, "cross-platform selling" was a bigger idea called "integrated marketing." Media conglomerates would use their many media assets in partnership with advertisers to create unique and powerful brand campaigns that would benefit both. There was no talk of discounts—quite the opposite. Sellers insisted that the value of an integrated marketing program was far greater than the cost of its components, and that demanded a premium price.

But most of it was smoke. By common definition, integrated marketing is the coordinated use of the elements of promotion (including advertising and PR), packaging, pricing and distribution to achieve brand goals. The "coordination" usually involves a central brand idea or creative theme.

That means integrated marketing needs to be more than media, and that's a problem. Most of the other elements that turn a media package into an integrated marketing program are best supplied by the client or the client's creative agency, not the media seller. In retrospect, integrated marketing was a product of the unprecedented media prosperity of the time, which invited media sellers to test the limits of buyer gullibility and pricing.

The only company that has been successful in partnering is AOL, with its dominance in a new medium, which offers response as well as exposure. It will be interesting to see if AOL Time Warner now can succeed with an integrated marketing sell, as distinct from media packaging. The company's new corporate structure suggests it is trying.

There's a lot in integrated marketing programs for media owners. What's in it for advertisers? That question is countered with another question. What is the difference between integrated marketing and media packaging? The answer is price.

The first thing a responsible agency does when looking at an integrated media program is to deconstruct the pieces to see if they can be bought for less elsewhere. If they can be, then for the package to be worth the money, the value of the media needs to be increased by the strength of the marketing concept. A difficult proposition. "Complete brand solutions" (a Viacom Plus phrase) are hard to come up with.

And that is the real clinker in the original Plan Godzilla. An integrated marketing campaign is a "campaign," much like an advertising campaign. Creative ideas count. And they are not plentiful. Especially in media sales departments. The difficulty in creating successful integrated marketing programs is illuminated by the contradiction of consolidation in media and unbundling in advertising.

Consolidation gives the media an opportunity to integrate creative ideas across platforms to produce more effective campaigns for big advertisers. But unbundling lets these same big advertisers separate creative from media to make each work better. Advertisers understand that totally different disciplines are involved.

The rapid growth of media agencies as compared to creative agencies makes the point. Superior media performance, because it is based on systems, is scalable. Superior creative performance, because it is based on talent, is not. Similarly, media packaging can be big business (as the $8 billion TV upfront demonstrates), while integrated marketing programs are likely to remain a cottage industry. Which brings us back to media basics: If the big idea isn't there to drive the integrated marketing program, it becomes a cross-platform package and price is the issue.

The media companies have got their cross-platform selling act together. It has not produced any basic change in the way media are bought and sold, nor is it likely to. Discounts are driving the cross-platform deals that are being made today. But whether that will continue in a stronger market is an open question.

As we are seeing, the power of big media sellers—or buyers, for that matter—to set price is more than balanced by market conditions and their own competitiveness.

Because there are many Godzillas chewing on each other, we have little to fear. ■

Erwin Ephron is a partner of Ephron, Papazian & Ephron, which has numerous clients in the media industry. He can be reached at ephronny@aol.com or at www.ephronmedia.com.


ADVERTISER FAN MAIL, JUST ANOTHER DAY AT ESPN RADIO.
HAWTHORN SUITES
From the Desk of Mike Leven
You Rock, Dan Patrick:
A big thanks to you and the team at ESPN RADIO. The spots we ran during your show were a slam dunk. Now guests can't get enough of our extended stay hospitality.
Oh, and thanks for the shooting tips. I've got three words for you...We Got Game!
Stay at #2, Feel Like #1
Mike Leven
Chairman, Hawthorn Suites
PS: I'm enclosing our corporate team picture for your website...the All-Star Hawthorn "Sweets."
We're number 2
ESPN RADIO
DAN PATRICK OUTTAKES
ESPN'S DAN PATRICK TODAY'S TOP ATHLETES
ESPN RADIO
THE NBA ON ESPN

To our Colleagues and Friends –

Our deepest condolences to those who have suffered losses.

Our sincerest thanks to those who have helped in the rescue effort.

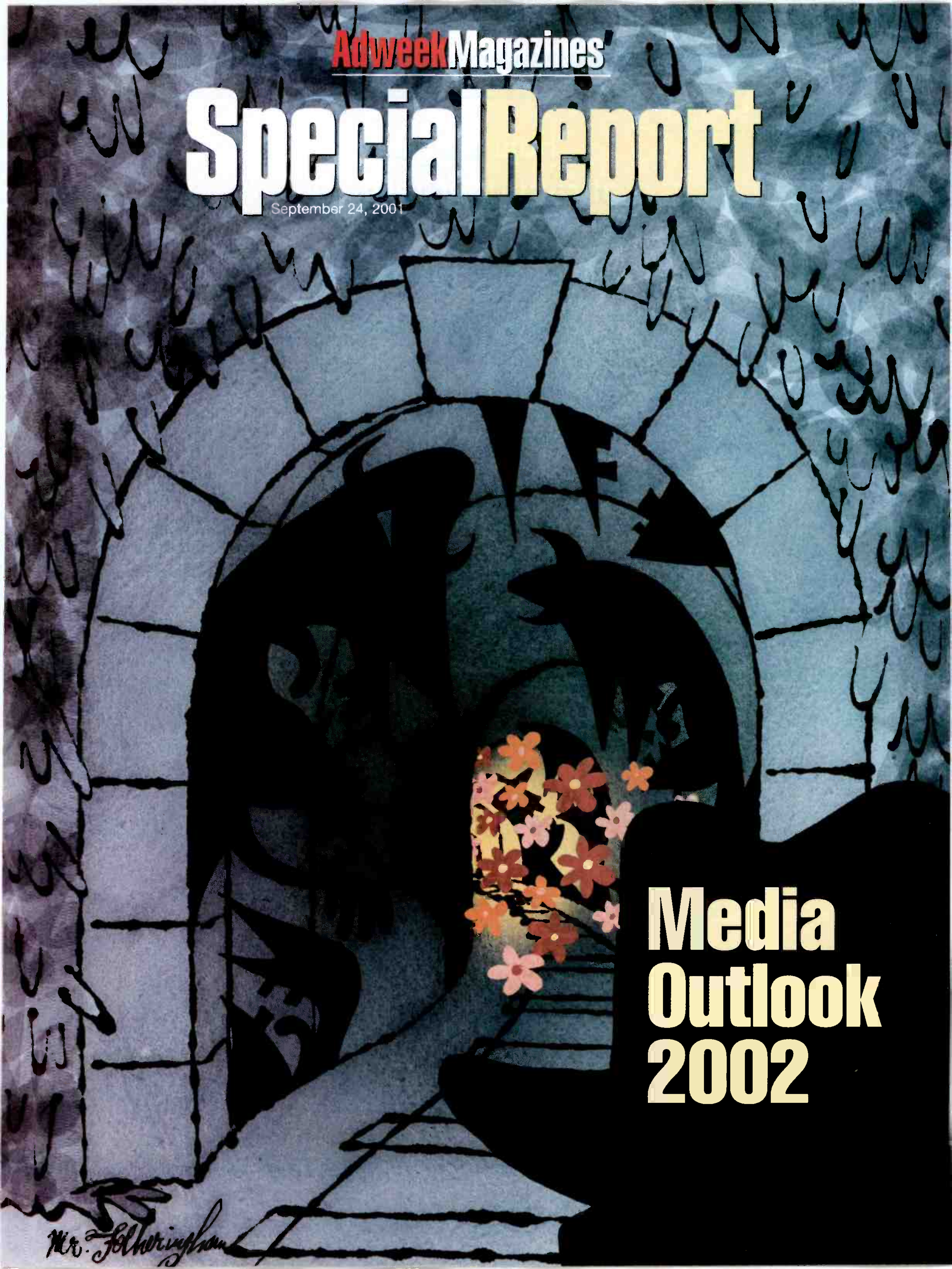
We salute the spirit of all Americans.

SCREENVISION
rolling stock
promotions
slides

Adweek Magazines

Special Report

September 24, 2001



Media Outlook 2002

When bad gets worse

Already struggling with a foul economic environment, the media business was thrown into further upheaval on September 11

BY VERNE GAY

ROBERTO SCHMIDT/ AFP PHOTO

"Back to normal."

In the days after the attack on the World Trade Center, these words seemed to be part of every utterance, every private thought, as in: "When we get back to normal..." or "If we get back to normal..." or "Will we ever get back to normal?"

To be normal, feel normal, live normally, and to go about your daily affairs in a predictable, familiar way, and to believe that tomorrow, and the day after that, and the next one will be all perfectly normal too.

In times of great tragedy, the desire for normalcy intrudes almost obsessively. We can't understand that 5,873 people—maybe our neighbors, friends, or family—are dead, violently and instantly.

It is this fact that now suddenly and profoundly affects the outlook for America's—and the world's—most influential industry. Media companies are comprised of people who project their own feelings onto the institutions for which they work. Advertisers are composed of people who are also trying to see through a fog of emotion and confusion. This country is filled with people who buy cars, and toothpaste, and magazines, and clothes. For these millions, the fabric of normalcy has been ripped to shreds. How can it ever be repaired again?

And so, this is probably not the best time to think long and hard about the future of this vast business. "We shouldn't feel normal in an abnormal situation," a trauma expert astutely observed on CBS News. Nor, frankly, should media companies.

Nevertheless, huge and unanswerable questions loom. American media was in the midst of a recession before September 11. How severe will this downturn become now? Advertising expenditures were down 3 percent before. Will they drop precipitously more? Media companies had already initiated widespread layoffs. Will those now accelerate?

"I think the business is

Editor's note

With the exception of the story on this page, the reporting, writing and editing of Media Outlook 2002 was completed before the attacks on New York and Washington. Everything changed that day, including, we can be sure, some of the forecasts contained within this special report.—Richard Brunelli, Editor, Special Reports

Cover Illustration by Ed Fotheringham

catatonic for the rest of the year," says Tom Wolzien, senior media analyst for Sanford C. Bernstein & Co. "Advertisers aren't going to know how to advertise let alone know what to advertise." He adds, "it's too early" to reconfigure revenue and profit estimates: "We're all doing costs. You do it because you've got to do it. But it's sort of, like, 'who cares.' The question now is, how long is it before we get some sense of stability going forward, and that means domestic stability when people feel somewhat safe, and can laugh again, and can be sold to, and can pay attention."

To put this in purely practical terms, airlines, hotels and resorts spent an estimated $957 million across eleven media in the first quarter alone, according to Competitive Media Reporting. What, one wonders, will this huge category spend in the fourth quarter? Or the first of 2002?

For a sense of the future, it may be necessary to look to the past. When the Gulf War—which helped precipitate the last great media recession—ended in early 1991, the television industry in particular went through significant, painful changes. In the midst of the war, prognosticators made sweeping predictions and some of them actually came true. Enormous news-gathering costs over-extended network budgets dramatically, which ultimately forced their news divisions to eliminate many overseas bureaus, consolidate newsgathering resources and create "sharing" arrangements with other broadcasters to shoulder various costs. None of the major news divisions went belly-up—a widely accepted prediction circa January 1991. Instead, CNN and ABC News would emerge stronger, and within five years, two new major news networks would debut—Fox News and MSNBC.

So much for predictions. CBS would, in fact, go through a period of enormous turmoil and transition. That, however, wasn't necessarily fomented by the Gulf War. Mismanagement by then-CEO Larry Tisch took its toll, and so did the network's abysmal primetime fortune.

Nor were the major networks (with the exception of NBC) shielded from the inevitable fallout by vast corporate umbrellas in 1991. They are now, and this might help to absorb the enormous cost overruns they are now incurring, and will continue to incur for the foreseeable future.

The upfront market in 1991 would suffer a downturn, but it turned out to be a minor blip. Within a year, the upfront soared and so did CPMs. The war and its economic consequences were, for the most part, a dim memory within 12 months.

But observers like Wolzien argue that any comparisons between now and 1991 are mostly bunk. The reason has to do with human psychology. For most viewers—and consumers—the Gulf War was a neatly and skillfully packaged primetime event that was mainly devoid of American bloodshed. (Although there was a horrific attack on a barracks in Saudi Arabia that killed American servicemen.) Viewers were ultimately rewarded with victory, and the national psychic thrill that American know-how—particularly American technological know-how—could rid a planet of evil. It was not a coincidence that the 1990s would be the decade of high technology, since the potency of high-tech had presumably been affirmed by the war.

The mood of post-September 11, 2001, is markedly, shockingly different. Consider: After the Gulf War, some broadcasters (like ABC News) would even package video of the war's most famous moments. No broadcaster would even contemplate a video of what has just transpired.

Like the period after the Gulf War, dollars and cents will play a vital role in the fate—or re-shaping—of various media outlets. This is still a commercial medium, and money has been lost and will be lost.

But also consider this: The ultimate effect, months or perhaps even a year away, may not be so chilling after all.

Frank Stanton, the legendary former president of CBS who is now living in Boston, says that after CBS's marathon coverage of the assassination of John F. Kennedy "it was pretty much a return to normal." In the wake of a national tragedy, the business of TV continued, as if nothing had happened.

In fact, much had. CBS's coverage of the assassination was perhaps the first time in which the glory and promise of network television news was fully realized. Major reputations were made. CBS would discover Dan Rather. Don Hewitt would become a star. Foremost, CBS would prove that television was an elemental part of the healing process. "I had a call from a man in the financial arena whose name I now don't recall," says Stanton, "who said 'You've got to stay with [the continuing coverage]. We in the banking community feel this is holding the country together.' "

"I always thought," continues Stanton, "that it was something we could be proud of."

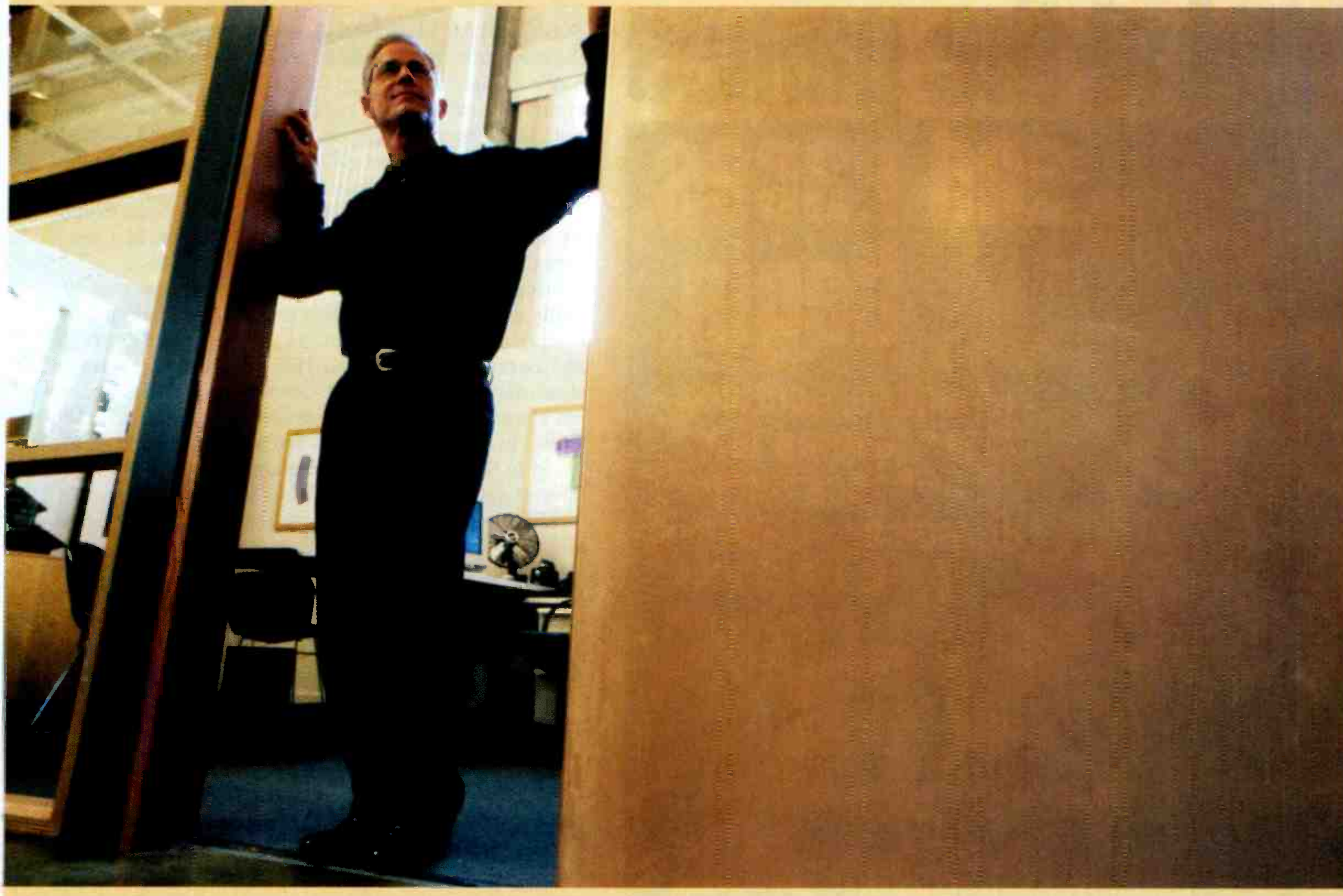
And America's many news organizations have also found something they can always be proud of. Take your pick: *Time*'s stirring special issue capped with a Lance Morrow essay of jaw-dropping power. *The Los Angeles Times* brilliant reporting of Osama Bin Laden's network. Or the endless, stirring, detailed, incisive reports of the major TV networks.

"The important thing is that these companies have done a brilliant job of doing what they do," says Wolzien.

So as the U.S. media industry stares balefully at the huge financial hurdles that lay ahead, its leaders have the consolation of knowing they have helped a deeply wounded country heal. Maybe some things are more important than money. ■

"I think the business is catatonic. Advertisers aren't going to know how to advertise, let alone what to advertise."—Tom Wolzien

Verne Gay is a writer and columnist for Newsday.

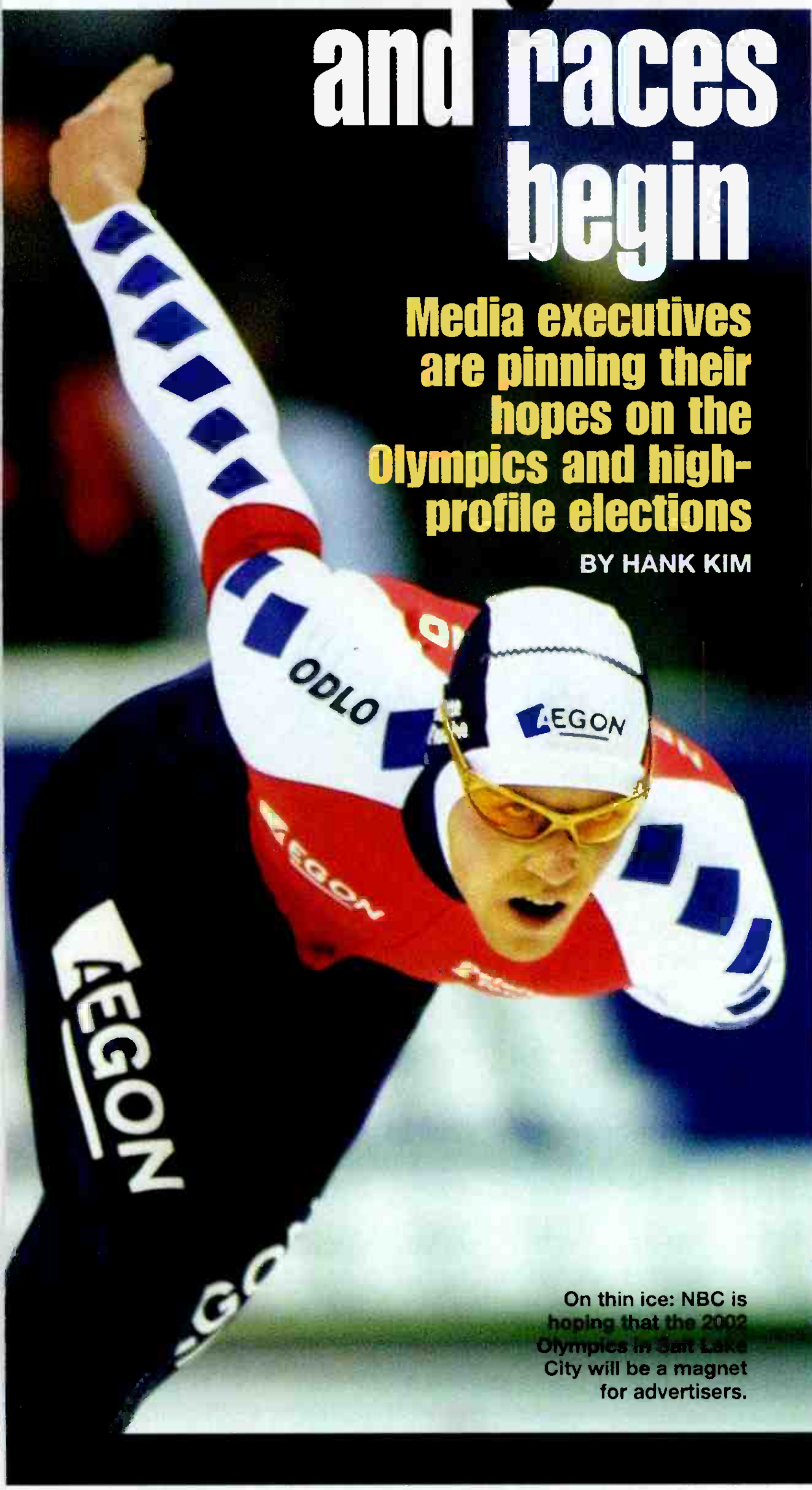


SPECIAL REPORT

Let the games and races begin

Media executives are pinning their hopes on the Olympics and high-profile elections

BY HANK KIM



On thin ice: NBC is hoping that the 2002 Olympics in Salt Lake City will be a magnet for advertisers.

GEORGE FREY/AFP PHOTO

Now that the long, arid summer is over, what the beleaguered media industry really needs is for the economic drought to end. And fast. Hope, in the form of two events, one cultural and one political, may be on the horizon: the Winter Olympics in Salt Lake City and the mid-term congressional and gubernatorial campaigns leading up to the November ballots.

"I expect 2002 will see a significant increase in spot TV spending," offers Robert Coen, Universal McCann's director of forecasting.

Coen says history has shown that an Olympic year virtually guarantees an increase in spot TV spending from the previous year. He points to the 1991-92 (Albertville and Barcelona Games) and 1995-96 (Atlanta) cycles as clear examples of that trend. Coen hedged against tossing out a prediction on the percentage increase, but with the Games in the States this time and not halfway around the world in Sydney like last summer, look for more viewer interest and ad spending.

"It's going to have a fairly sizable impact on both first and second quarters, especially on the Super Bowl," says Marc Goldstein, president of national broadcast and programming at WPP's Mindshare. Goldstein looks at it as a robbing Peter to pay Paul proposition. He says there are advertisers who typically buy the Super Bowl, but who may end up having to recalibrate their media allocations because of their Olympic commitments.

"Beyond the Super Bowl, what impact does it have on the rest of the year when you put so much money behind the Olympics for just a couple of weeks?" wonders Goldstein. "The Olympics in effect preempt 17 days of primetime activity."

According to the Mindshare executive, in the past, Olympics budgets have been incremental outlays, but now are increasingly funded from annual marketing budgets, which would of course mean that there will be less money to go around. And when you consider many marketers have tightened their belts because of the economy, it makes the media dollars even scarcer.

But when it comes to blue-chip marketers, who seem to always have a boundless reservoir of cash, there is enough to go around for the Super Bowl, Olympics and any other branding platform deemed necessary.

"Very large marketers like the Big 3 [car companies] have budgets sufficient enough to accommodate all major events," says C.J. Fraleigh, executive director of advertising and corporate marketing at General Motors. "At GM we've been going from the Super Bowl to the Olympics to the Oscars for years."

GM is currently in the midst of a 10-year sponsorship package that began in Nagano in 1998 and will extend through 2008 in Beijing.

To get an idea of the scale of marketers' regard and commitment toward the Olympics, the top five advertisers in primetime during the Sydney Games together spent roughly a total of $180 million. GM along with Coca-Cola,

> **"Even in the face of a difficult marketplace, there's strong interest in the Olympics." —Kevin Sullivan of NBC Sports**

Anheuser-Busch, IBM and AT&T were the top spenders.

As for whether the Olympics will have a positive impact on the scatter market and spur overall ad spending for 2002, "that's going to be driven by far-reaching economic forces more so than any one event, even one as prominent as the Olympics," according to Fraleigh.

A local TV station executive said NBC is not as well sold in the Salt Lake City Games at this point as they were in the Sydney Games at a similar juncture, both locally and network-wise. But he acknowledges that local avails will likely fill up later, thus the Peacock sales staff is not considered to be panicking.

Kevin Sullivan, vice president of communications for NBC Sports, confirms that 85 percent of the inventory has been sold for Salt Lake City and NBC brass feels they're right on target to meet their sales objectives. "Even in the face of a difficult marketplace, there is strong interest in the Olympics," he says.

As for the political landscape, it used to be that presidential campaigns would allocate media budgets to both network and spot television, but the focus has shifted virtually exclusively to local efforts. According to Goldstein, the networks were shut out completely by the aspirants for the White House last year. And, once again, the emphasis will be on spot TV when it comes to the 2002 campaign trail.

"Everyone thought 2000 would be a realignment election; everything from a landslide on one side to a landslide on the other could've happened," says John McLaughlin, a Republican polling strategist (not the irrepressible TV pundit), whose clients include Speaker of the House Dennis Hastert. "But in essence we got a political tie."

Both parties set records last year in ad spending for Senate and House seats. McLaughlin points out that Democrats outspent the GOP on the Senate side for the first time in 2000.

The House of Representatives should be a hotly contested battleground in 2002, as redistricting, which incorporates updated Census data, will shake up the calculus. According to Mark Nevins, a spokesman for the Democratic Congressional Campaign Committee in Washington, the DCCC, in the previous three election cycles, targeted 30 to 40 campaigns in terms of resources and support. For 2002, Nevins says 80 to 100 campaigns can expect support. "We're looking at a lot more money," says Nevins. He points to California—beleaguered Democratic Rep. Gary Condit could be affected—and Maryland as two states that will be tightly contested as a result of redistricting.

On the Senate side, where the balance of power is extremely delicate after the defection of Vermont senator Jim Jeffords from the Republican Party, there will be a number of key battles.

Much of the media attention will be focused on North Carolina, where candidates should start coming out of the woodwork soon to replace right-wing senator Jesse Helms, who recently announced that he would not seek a sixth term. Much of the parlor talk revolves around prodigal daughter Elizabeth Dole, a Republican, who recently registered to vote in the North Carolina town where she grew up, a clear indication that she's eyeing Helms' seat.

In total, there will be 34 Senate seats up for grabs: 20 Republican and 14 on the Democratic side.

According to Dan Allen, the spokesman for the National Republican Senatorial Committee, the GOP will focus on eight of those 14: South Dakota, Minnesota, Iowa, Missouri, New Jersey, Montana, Louisiana and Georgia.

New Jersey is shaping up as a shrill contest as the embattled Robert Torricelli, who is considered the most vulnerable incumbent Democrat with a 31 percent favorable rating nationwide, waits to see who his opponent will be. Both ex-N.J. governor Tom Kean and Steve Forbes are rumored to be contemplating runs at Torricelli.

Also expect a lot of attention paid to the gubernatorial slate in 2002. Gray Davis in California could be looking at a challenge, while the New York race could be a donnybrook, with incumbent Republican George Pataki trying to stave off the likes of Andrew Cuomo. Florida could be a real bellwether as Jeb Bush will be facing former Clinton attorney general Janet Reno.

One wild card that could impact spending in 2002 is campaign finance reform. If some form of law is passed, it will probably change the way money is allocated and not the actual amount spent.

"If a law is passed, you might see fewer TV ads and more grass roots efforts like membership contact [much of it via phone]," says McLaughlin. "It's 50-50 that a law would pass; members on both sides want to see something, but both sides want their version."

Politicos, just like marketers, understand that baby boomers are their most important constituency; this demographic drives the elections, with concerns such as healthcare and social security reform dominating the agenda. The biggest variable, of course, will be the state of the economy. If the economy doesn't improve, the Democrats could be licking their chops when November of 2002 comes rolling around. ■

Hank Kim is a freelance writer based in New York City.

[redacted]

When will it end?

We all knew, or at least we all suspected, that it might come to this. The dot-com collapse. The Wall Street swoon. Disappearing profits. Widespread layoffs. Waning consumer confidence. The cold, hard truth that what goes up must come down.

We knew, or suspected, that the media marketplace would take a hit too. The upfront market couldn't keep growing forever, could it? Magazines couldn't keep adding pages until they started to look and feel like the New York Yellow Pages, could they? Newspapers couldn't keep piling on page after page of classifieds if jobs started to disappear, right?

What we didn't know is when this would happen, or how severe the downturn would be. Well, we now have our answers and—let's be honest—nobody saw it coming. The great media recession of 2001 is upon us and it has slugged an entire industry on the back of the head, quickly and with blunt force.

The numbers paint an unsparing picture of media's current predicament. According to first quarter 2001 figures from Competitive Media Reporting—the only ones available at deadline—General Motor's spending is down $160 million, to $517 million. Philip Morris: down $120 million. Ford: down $60 million.

From January through July, total magazine pages fell nearly 12 percent. Of the Magazine Publisher Association of America's 255 members, 170 suffered declines in pages and revenue. The network primetime upfront market fell 15 percent, to $6.8 billion. That's $1.3 billion off last year's record and the largest one-year decline ever. The late-night upfront was down 8 percent and so was early morning, according to agency estimates. News? Down 19 percent. Daytime? A full quarter of that marketplace evaporated. Cable and syndication plummeted more than 20 percent. Advertisers in the various upfronts spent a total of $14.6 billion this summer, which sounds like a nice healthy number until you realize that is 18 percent below last summer's total.

Meanwhile, national spot revenue is off by 20 percent, in both TV and radio. Total radio revenue slipped 8 percent, and 2001 is on pace to become only the second time in 51 years that radio has tumbled year to year.

Yet the newspaper figures are particularly unsettling. Classified revenue during the second quarter was $4 billion, or 15.5 percent down from the first. According to 30 years of data posted on the Newspaper Association of America's Web site, that is the largest quarterly decline ever—by a wide margin.

But these numbers are also somewhat deceptive. Consider this: 2000 was the strongest year in media history, with rocket booster fuel provided by a blistering hot economy, an aggressive stock market and record expenditures by automotive, retail, telecommunications and technology advertisers. Even if 2001 keeps up its currently abysmal pace, total expenditures will still match 1999 levels, which were also extraordinary.

What's so wrong with that? Nothing, of course, except that—ahem—it happens to ignore the obvious, which is this: The numbers are trending down and no one knows exactly when the hemorrhaging will stop. This is what makes a 2002 forecast so tricky and why few observers can agree on what the new year will bring. There is a general industry consensus that 2001 is essentially over. Confusion takes over by the first of next year. Many do not believe a recovery will take place until the second quarter, and a particularly pessimistic minority suggests 2002 will be a bummer as well. Yet there are still others—bolstered by historical trends and a firm belief that down cycles last only 12 months—who insist 2002 will come roaring back.

Perhaps the most bullish is Veronis Suhler, the media merchant bank. The company's forecast calls for a 6.9 percent spurt in 2002, to $187 billion. That is exactly a $10 billion increase over 2000.

If other forecasts aren't as rosy it's not surprising. The Federal government and Wall Street can't agree on the timing of a general economic recovery either, and unless people start buying cars, computers and other high-priced durable goods again, there's little reason to assume the media marketplace will revive either.

And then there's the most inscrutable, unpredictable element of all—human psychology. Clearly, many advertisers are pessimistic about their own businesses, which have led directly to the slashing of media budgets. But doubtless, there are many who are overjoyed that the single biggest fixed expense in their marketing budgets—television—has decreased in cost for the first time in a decade. And many of these may be reluctant to boost budgets in the new year if that means a return to the days of spiraling, out-of-control costs.

So, into this muddle step the prognosticators. Robert Coen, who has tracked more than 50 years of ad spending for McCann-Erickson (now Universal McCann), explains that "the first and second quarters were pretty bad and

When all is said and done, 2001 will not be a year that too many media people want to remember. The question is: Will 2002 be any better?

BY VERNE GAY ILLUSTRATION BY ED FOTHERINGHAM the third may show a little improvement in cable and a couple of other media. So it'll be the fourth quarter before we see any signs of whether the [year-to-year] comparisons will get better. I think they will, but I don't see any hard facts."

He adds, "the tendency over the years has been that over-optimism prevails until somebody gets a kick in the balls, and then they grab their crotch and then pessimism prevails. I think people are a little bit over-pessimistic right now."

Observers say that before you can get a handle on 2002, you have to understand what happened in 2000, which in itself was an aberration. It's hard to get specific figures on technology spending because Competitive Media Reporting lumps the dot-com advertisers into one catchall category: "computers, software, Internet." But it's also abundantly clear the category is in a steep decline. In the first quarter of 2000, computer and dot-com advertisers spent $852 million among 11 major media groups, but that fell $100 million in the first quarter this year.

The loss of tech advertising had a ripple effect throughout the media economy, and directly affected the costs that other advertisers pay. For example, a top executive at a major network-owned station explains, "this time a year ago, none of us in this business could believe how well we were doing. It was ludicrous. No one projected that last year [CPMs] would be up 120-something percent. All of a sudden a category [technology] came in that you never saw before and chewed up prime real estate, and if everything else stayed equal—if every other advertiser came in at the same levels—their costs would still go up" because of supply and demand. This executive said tech advertisers represented only 7 percent of all revenue in his market, but its disappearance meant that CPMs for remaining advertisers came crashing down.

The great tech drain of 2001 would mean lower costs for a host of other advertisers, but that only partly explains the bust in automotive spending, which plummeted more than $200 million in the first quarter this year. Indeed, the two leading ad categories—automotive and retail—fell $400 million in the first quarter alone, according to CMR figures, which also reveal that every top 10 ad category—with the exception of pharmaceutical—took a dive this year. Radio, cable, newspapers and, of course, television have taken the brunt of this hit.

Besides the dot-com collapse, there are myriad reasons why so much money simply disappeared. Ironically, one of them is the now obvious fact that many advertisers simply spent too much last year. Many advertisers were scorched during the torrid 2000 upfront market, and brought record CPM hikes on themselves when they overbought and later dropped hundreds of millions of dollars worth of options earlier this year.

And so the thinking in the long, brutal summer of 2001 was this: Why over-buy when scatter is expected to be cheap and plentiful? Worried about their own increasingly lousy businesses and falling stock prices, advertisers sat on the money and—guess what?—scatter is now wide open in the fourth quarter. The networks also sold substantially less inventory on the bet that scatter money would materialize. So far, that looks like a very bad bet indeed.

The giant supporting pillars of the media business—magazines and TV—were "definitely oversold [last year], so we could see this one coming, " explains Alec Gerster, executive vice president of media and programming services for the Grey Global Group. He says the percentage drops for the various media look so dramatic now simply because they are being compared to the hyperinflation of a year ago.

But, he adds, "the immediate severity of the drop would indicate some of what I would call overreaction where [advertisers] collected every dollar, every optionable dollar, every variable expense and put their arms around it until they got a feel for where things were going. If people are cutting back on capital, there's no reason to think they couldn't cut back on variable expenses like marketing funds."

No reason at all. So here, then, are the million dollar questions as 2001 draws to an end: Is there any reason to assume that advertisers—national and local—have cut back on these "variable expenses" as much as they intend to? And any reason to believe another torrid ad spending cycle will begin anew next year?

Historical trends suggest the answer is yes. In 1980 and 1991, the last two downturns in the U.S. media economy, the bleeding lasted for exactly one year. Companies pulled in advertising dollars each quarter to prop up earnings, and then came roaring back the following year *(see sidebar on page SR11)*.

The possible problem for 2002 is that there doesn't seem to be many marketing feuds between category rivals in the offing. "No one's going to tell you there's [an impending] battle out there," says one agency source. "The telcos? You've got Verizon and Cingular, but they're

"Companies are not really going to be coming forward with additional spending on an exuberant, unfettered basis." —Aaron Cohen

To-Do List for Economic Recovery

- Durable goods orders must be strong.
- Stock investors need to build confidence—and a steady recovery.
- Traditional big spenders like auto advertisers need to rev their engines.
- Competitive categories like fast foods and soft drinks should fight for market share.
- Media companies should be on the lookout for new, hot categories.

past their launch stage. No wars in beers. No wars in cars, and there's always a war in cars. But is Ford going to spend $50 million more [next] year? No way."

Aaron Cohen, executive vice president of broadcast for Horizon Media, says "I see a continuation of this down situation for some extended period of time. I grant you we are only now beginning to see second-quarter results coming in from corporations, but the feeling I have from talking with various people is that the companies are not really going to be coming forward with additional spending on an exuberant, unfettered basis."

Of the sanguine Veronis Suhler forecast, Joe Ostrow, president of the Cable Television Advertising Bureau says, "I wish they were right [but] I see no reason to believe the rebound will be that substantial. I expect some rebound, but to say it will rebound above and beyond 2000 is a tough call to make. Unfortunately, we don't have what we've had in the past on these occasions, which is a hot category, although maybe one will emerge."

Indeed, there is some reason for optimism. The most obvious may be simply this: "What's going to happen next year," says Gerster of Grey Global, "is that year-ago comparisons are going to change. If we continue to see the same percentage declines, then we're in deep trouble, but you'll see a leveling off [because] your comparison base is less inflated."

Without question, last year was a mixed blessing for this reason. For example, *Business Week*, was up 35 percent in both pages and total revenue last year, and expects to finish the year down 30, according to Bill Kupper, president and publisher of the Business Week Group. "We've lost," he says bluntly, "what we gained."

"But I think based on some early reporting and internal orders [that] I see good daylight in November and December." Then, he says, the revenue picture is clouded until next September. "Then I think it will take off, and 2003 will be a fabulous year."

The hard-hit consumer magazine sector also is hoping for gradual recovery. Steve Lacey, president of the Meredith Publishing Group, says both *Better Homes and Gardens* and *Ladies' Home Journal*—bellwether magazines for key categories like package goods—have seen revenue increases in recent issues versus the same period a year ago. "The important caveat," he says, "is that we are not telling ourselves or the investment community that we think this is a trend, but if we had talked five months ago, every one of our books was down. We, like everyone else, are trying to figure out where we are in this cycle."

Ken Wallace, senior vice president of corporate sales and marketing for Gruner+Jahr adds, "the consumer books are not doing badly [like *Rosie's McCall's*, *YM* and *Family Circle*], but the two business books have gotten killed [*Inc.* and *Fast Company*]. But we're reasonably confident here."

If there's any reason for optimism—and everyone agrees that the torture of 2001 will eventually end—it will simply be because the most obvious and enduring fact of life in commercial media remains unchanged. "There are still a lot of clients producing goods and services out there, still a lot with a similar number of competitors out there," says Mark Stewart, executive vice president and regional director, North America, Universal McCann. "All boats float on a high tide and all boats drop on a low tide as well, but like any correction, they will need to go to market, they still need to watch their competitors. The relationship with the consumer hasn't stopped." ■

The way we were

If history teaches anything it is this: Quite often we repeat our mistakes. And if we look back at the last media recession in the early 1990s there are a few important similarities to today's economic slump. Ten years ago, a sour economy led advertisers to pull back marketing commitments in droves.

But during that period those same advertisers were just as likely to reallocate billions of dollars into promotion, as part of the early '90s craze for "optimization." When the love affair with promotion cooled, mainstream media came into favor once again. There is no such dynamic in this year's marketplace.

There were other unique twists in the 1991 story. Total media expenditures in '91 fell $3 billion to $38.7 billion, but would soar $5 billion to $44 billion the following year. However, a good chunk of this growth—just about $3 billion to be exact—came on the back of newspapers. In 1992, a large group of retail advertisers—Federated, May, Circuit City, Montgomery Ward, K Mart, Dayton Hudson—boosted newspaper budgets dramatically, in some instances by $100 million or more, according to Competitive Media Reports figures. But CMR figures reveal that the overall advertising recovery was uneven. For example, the top three network TV advertisers of the time—Procter & Gamble, General Motors and Philip Morris—continued to slash their budgets in '92. GM's network budget alone fell by over $100 million during the so-called "recovery year."

If the '92 recovery was sparked by a spending binge in the retail category, is there any reason to believe retail will come to the rescue again? Well, probably not. Except for Circuit City, the spending giants of '91 don't even fall among the top 20 retail spenders of 2001. Some of them (like Montgomery Ward) don't even exist anymore.

So who will be the White Knight of 2002? Automotive? Telecommunications? Pharmaceuticals? Stay tuned.—*VG*

Taking stock

A team of media analysts says that 2002 will be another difficult year ... unless advertisers begin to believe in the economy again

BY PAUL D. COLFORD ILLUSTRATION BY MICHAEL MORGENSTERN

If leading media analysts and consultants agree on one thing, it's the severity of the economic slowdown. Some of them have revised downward their forecasts for this waning year and become even more tentative about prospects for a turnaround in 2002.

They also see a need for marketers and media to tough it out by making strategic decisions now—not later. As the consultant Michael J. Wolf puts it, "Typically, at the end of a cycle like this, the consumer companies that will emerge even stronger do so because they continued to market themselves."

Interviews with Wolf and five other top media analysts yield not only contrasting views of ad spending in the year ahead, but also a wealth of insights into how media and advertisers may act—and interact—in the chilly climate.

"The experience this year has been something like a 100-year storm or a 100-year flood—a disaster that will take some time to dry out in the six to 12 months ahead," says Leland Westerfield, media analyst at UBS Warburg. "We've seen the worst in the advertising declines. Now, when do we lift off bottom?

"Radio recovers sooner than TV station advertising, and niche periodicals and cable sooner than the general-interest books and the networks," he added. "That said, this is a flood tide that impacts everyone in media by degrees. I think we're going to see low-single-digit growth—2 to 5 percent increases in 2002.

"At the surface, the tide is moving out and the rates of advertising declining, yet deep beneath the surface, ocean flows are working in favor of media companies," Westerfield goes on in his analogy. "The competitive pressures among the pharmaceuticals and the telecoms, for example, will compel more national brand advertising over time."

Westerfield is among those who doubt there's some new product or cultural development far out on those seas that might appear unexpectedly on the horizon to buoy all media. "If there is, I don't see it, and I have a strong desire to find it," he says.

"In the late '90s, in almost every year, there was some new category—whether it was the pharmaceutical advertising or financial services or the dot-coms—that came along and infused more dollars over the prior year. This year and in 2002, I see no such newcomers putting demand on commercial inventory. But in the aggregate, the softened competitive barriers among consumer companies themselves add up to a driving force in national branding."

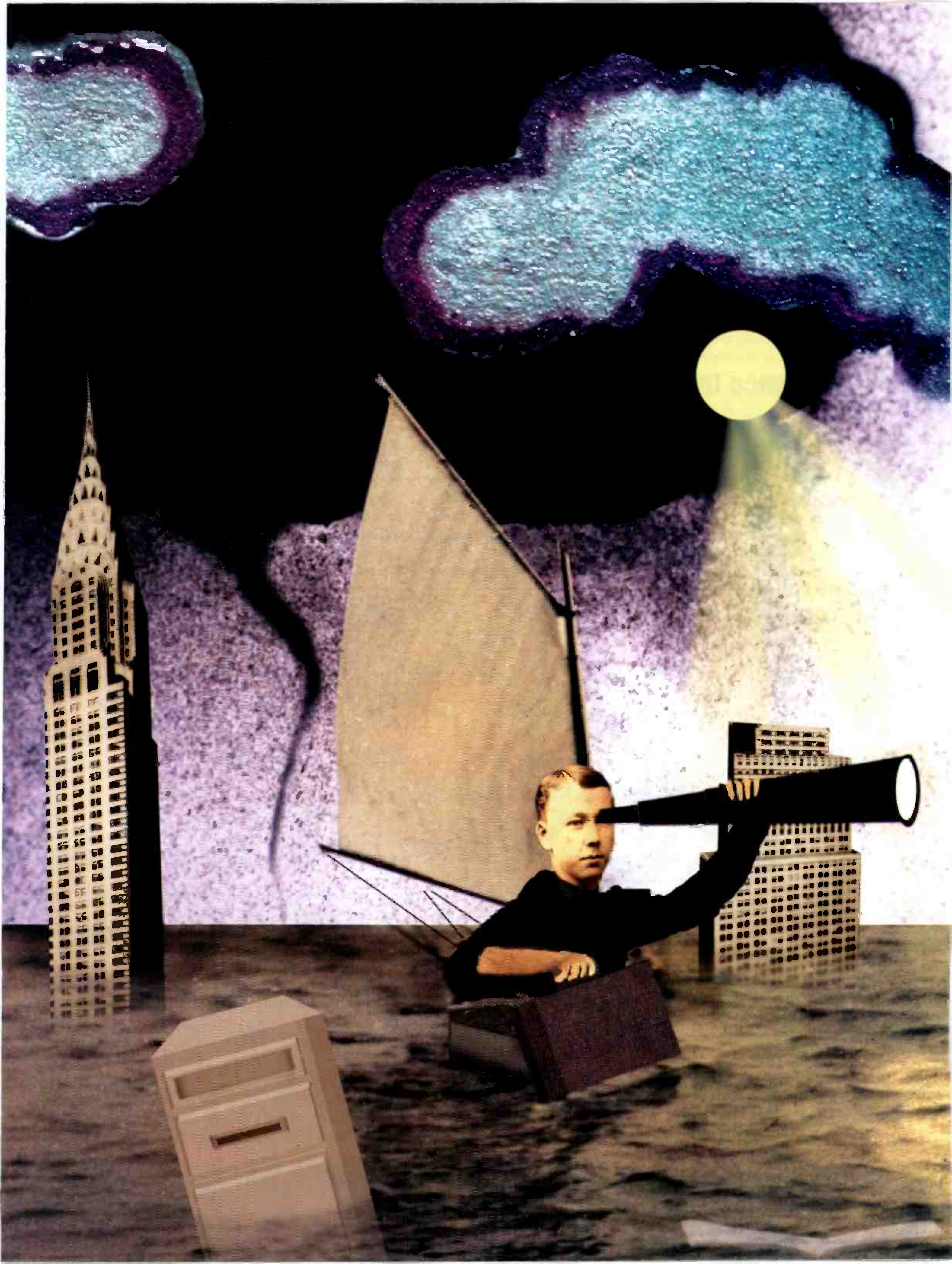
He adds: "We can't overlook how advertising is being pushed by business investing, like investing in a physical plant. So for advertising to revive next year, one has to argue that business investment should revive. By any reckoning, that would stretch reason."

"First of all, advertisers will really tend to focus their buys on the strongest shows, networks and local TV that they believe have the strongest ability to move their product or move traffic," says Michael J. Wolf, the head of the global media and entertainment practice at McKinsey & Co. "So the real issue is not how much more they're going to spend, but where they will focus their spending."

Wolf also sees an increase in cross-business deals that major media companies are able to cut with different advertisers—witness Viacom and Procter & Gamble's $300 million cross-platform agreement—"because advertisers are looking for efficiency and the media companies are looking for ways to attract them."

Has a Darwinian shakeout already favored the strongest Internet properties? "I don't think it's just an AOL world, but the major sites will get a disproportionate share of traffic and business, whereas a lot of testing went on before," Wolf says. "Advertisers are going to focus their buys online where they can produce the most for them."

Wolf suggests that the unsettled economic climate, in a



perhaps unexpected way, will help generate ad spending. As he puts it, "The only thing that could happen in this environment is that major advertisers—the auto companies, computer makers, major retailers—will need to advertise to ensure sales of their product."

He adds: "At the same time, the slowdown in spending comes after tremendous increases—such as from the dot-coms—and also increases in buy rates. There will be media companies that get an increase in rates, but only for targeted audiences the advertisers are unable to reach in other ways."

The author of *The Entertainment Economy* sees entertainment playing no less of a role going forward. "Just look at the number of advertisers making major deals with film companies and music companies to feature their products or just to associate with them." Wolf says.

"The experience this year has been like a 100-year storm or a 100-year floo

Forget the estimates of independent researchers that see growth in online advertising this year of 20 percent or more, says Holly Becker, Internet analyst at Lehman Brothers, who predicted last year that Yahoo! would bruise badly as dot-com ad dollars fell. In August, she forecast a downturn of 7 percent in 2000, to about $5.44 billion, while seeing brighter skies next year in the form of a 20 percent rise in online spending, to $6.5 billion.

"By 2002, a lot of companies are going to get their act together, but we'll start off a low base, so the first couple of quarters may be rough," she says. "And you've got a different kind of negotiating process going on. The portals are saying to advertisers, 'How can we help you and how can we integrate with what you're doing elsewhere?' "

Becker adds: "Last year they were basically taking orders at the portals. Now, they're being more reasonable and flexible. But the dollars are going to remain very concentrated, because there's no one else left standing."

Concentrated indeed. Becker's report for Lehman Brothers sees a nearly 30 percent surge in AOL's online ad revenue this year, to more than $2.7 billion, or almost 51 percent of market share. Moreover, Becker estimates that the top 10 ad-supported Internet properties will devour 90 percent of the online dollars this year alone.

Online extensions of print outlets "can't ride the coattails of the bigger portals," she goes on. "They can't compete, so they need to serve a different purpose or offer a more targeted buy. Advertisers are not willing to shift the dollars, so the best the publishers can do is say, 'Hey, you're going to spend $5 million in our magazines, so how about making that $5.1 million to add a piece online.' Those sites will have to stand on their own in two years or so."

Beyond next year's estimated growth of 20 percent, Becker sees online spending on an upswing of 25 percent annually, reaching 3.6 percent of total ad spending by 2004 while recalling the strides made by cable in its years of greatest growth. "In the cable business, you had five or six good examples that reached critical mass so that advertisers and brand managers couldn't ignore them," she says. "The issue with growth is that it has nothing to do with page views—it has to do with advertisers' mindset."

Tom Wolzien, senior media analyst at Sanford C. Bernstein & Co., crunched numbers mined from the historical record to come up with his recently revised downward projection that total ad spending will drop about 3 percent this year before it rises 2.6 percent next year and grows sluggishly through 2004. Specifically, he estimates that next year TV will be up 3.7 percent; radio, 5 percent; magazines, 3 percent; and newspapers, 1.8 percent.

The first-quarter growth rate this year was 1.3 percent. Second-quarter numbers out in late August showed that the Gross Domestic Product grew at a revised annual rate of 0.2 percent.

"TV, overall, has benefited from the dot-coms and the huge amount of financial advertising, and it benefited from the bricks-and-mortar advertisers concerned about the dot-com stuff," he says. "And all that sopped up supply, even though it was creating more supply and, in the process of doing that, caused pricing to go up. So now we're in a rationalization process ... There are too many commercial positions in there."

As for the Internet, Wolzien doesn't go so far as Holly Becker in forecasting a decline this year as steep as 7 percent. After a tripling of spending online in 1999 and a run-up of 85 percent last year, he sees a downer of 4.8 percent this

—a disaster that will take some time to dry out." —Leland Westerfield

If you look at advertising as a market share of the GDP [Gross Domestic Product], it stays down for a couple of years," he explains. That is, a view of the last two advertising cycles—from a peak in 1960 to a peak in 1988, when advertising represented on average 2.05 percent of GDP, and similarly from 1988 to 2000, when it averaged 2.24 percent—shows that it took four to six years before ad spending started to grow again as a percent of GDP, even though outlays did rise during the period.

year being followed by a 19.4 percent gain in the year ahead. But he's on the same page with Becker in calling AOL "the only force. Below the top 10 or 20 [online properties], it's a tough road."

Wolzien believes that, as advertisers become more comfortable with the medium, more and more content and advertising will cross over from print to cyberspace. "I think you're going to see more content from the magazines owned by AOL going online just as AOL is trying to offer more advertising and marketing solutions," he says.

Considering that the Newspaper Association of America showed total advertising in newspapers down 6.5 percent in the first half, compared to the same period in 2000, publishers may have been relieved that a recently revised downward forecast from the NAA's former chief economist sees a decline of only 2.1 percent this year.

Barry Groves—now chief economist of The Barry Group, a newspaper marketing consultancy—says: "If you look at the turning point as being the fourth quarter, then you're looking for a reasonably good year next year. If the turning point is the fourth quarter, classified should come back strongly, driven by recruitment, but I don't think as strongly as in the past. Retail has continued to perform above par and will continue to do so. The big swings will be in classified and national advertising."

As Groves sees it, the economic slowdown is having a greater impact on newspapers than the one in 1990 because classified, which then made up 36 percent of the industry's ad base, has grown to more than 40 percent, and recruitment's share of classified has more than doubled in the same period, to 17 percent. In the second quarter, recruitment fell 33.4 percent, according to the NAA.

"Newspapers still have to look to strategic decisions," he says. "To pull in their horns and wait for a sunny day is to create more problems down the road ... Newspapers have been through cycles before and there will be more."

PricewaterhouseCoopers' Global Entertainment and Media Outlook: 2001-2005 forecasts a 3 percent gain in total ad spending this year, followed by a 8.8 percent jump in 2002.

"Over the long term, we're fairly bullish, and we see 2002 as a recovery year," says Pete Winkler, the marketing director of its entertainment and media practice. "In most categories, there will be a recovery from the malaise we see in 2001."

Pricewaterhouse's forecast, however, calls for little growth from the publishing sector. "We look at publishing and in general growth is slower," says Winkler. "With newspapers and magazines, there's not as much room to grow. It's a saturated sector and there are a lot of media choices for consumers. In the last 12 months, newspaper publishers' ad market in particular slowed down quite a bit—though ironically they were beneficiaries of the dot-com boom—and they're going to continue to be one of the slow-growing sectors."

How slow? Pricewaterhouse sees a 2.5 percent gain for newspapers this year and a rise of 5.4 percent in 2002. Its view also shows consumer magazines up a blip of only 1.4 percent in 2001 before reviving by 7.7 percent next year.

"For 2002, I couldn't identify one area to lead growth," Winkler went on. "But there have been interest rate cuts this year, which typically show their effects months later. Advertising is a leading indicator into and out of a downturn, so we think it's going to get better for media. In addition, there are good signs of consumer spending and the housing market has remained strong.

"One thing that's also apparent is that advertisers will remain in the driver's seat in 2002. They're going to demand and get more for their dollars." ■

Paul D. Colford is a media columnist at The New York Daily News.

“Who Cares About C&D Counties?”

COTY BEAUTY does.

“American Profile provides our Stetson Fragrance brands a clutter free environment that maximizes our reach to important segments of our consumer target. You can not be a true player in the mass market without talking to C and D counties.”

— Arthur Sherwood
Senior VP-Marketing, Coty Beauty U.S.

Who else?

NBC | Sony Music NASHVILLE | ConAgra Foods | Hillshire Farm | COLGATE-PALMOLIVE

...and *American Profile* takes them there.

- C&D county annual retail spending is $305 billion* (25% of total U.S. spending)
- C&D county consumers shop where your brands are sold (Wal-Mart, Kmart)

* Source: 2000 MRI Doublebase

Wal-Mart and Kmart are the trademarks of each company.

American Profile
Celebrating Hometown Life

Nobody covers C&D counties like we do. *Nobody.*

Network TV

There will be twice the insults when NBC airs *The Weakest Link* two nights a week beginning this fall.
DAVID BJERKE/ NBC PHOTO

Net Gains?

UPFRONT WAS A BUST AND RATINGS ARE DOWN, BUT THE NETWORKS REMAIN HOPEFUL BY JOHN CONSOLI

Network television took a major hit in this year's upfront buying, with advertisers committing to spend 15 percent less dollars for the 2001-2002 season than they did last season. However, media buyers agree that network TV is still, dollar for dollar, the best place for advertisers to reach both a mass audience and a huge number of targeted demographics in one swoop.

It's true that network TV, like most other ad vehicles, lost hundreds of millions of dollars in dot-com money. But as Veronis Suhler, the media investment firm, recently stated in its annual *Communications Industry Forecast*, "The Internet bubble may have burst, but that doesn't mean the fizz has gone out of the communications industry."

Network TV advertising revenue in 2000 grew 12.8 percent to $16.3 billion, after only a 2.3 percent gain in 1999, according to Veronis Suhler. But despite the depressed economy this year, Veronis is projecting network TV advertising to drop only 2.3 percent, to $16 billion.

Over the long term, however, Veronis predicts network TV advertising will grow 4.2 percent between 2000 and 2005, reaching $20.1 billion.

Another boon is rising TV viewership in general. The number of television sets in U.S. homes rose to 244 million in 2000, up from 240 million the year before. The average household now watches TV 7.9 hours a day, up from 7.4 hours a day in 1999 and 6.9 hours in 1990. More TV sets in the home and rising daily TV viewing means the networks have potential to maintain—or even grow—their audience for advertisers.

Where the networks have fallen down a bit, however, is in the ratings, or viewing of their shows. The growth of the number of cable networks has meant continued fragmentation. The six broadcast nets ended last season down two rating points and three share points over the season before in households. And in the beloved 18-49 demo, the broadcast networks cumulatively were down a half rating point and one share point over the previous year. Some positive news is that the six broadcast networks renewed 22 shows that premiered at some point last season, up from 18 the season before.

"With so many viewing options available, many shows are becoming successful during their second season," explains Steve Sternberg, senior vp/director of audience analysis for Magna Global USA. "It makes sense to give a show [that] has some potential a chance to grow rather than replace it with something that may do worse."

Veronis Suhler believes it unlikely that the success of some reality or game shows, like CBS's *Survivor* and ABC's *Who Wants to be a Millionaire*, "will provide a long-term solution to broadcast television's sagging ratings. However, NBC successfully got into the game show field last spring with *The Weakest Link*, which has been a top-rated show throughout the summer. NBC is counting on the show to draw big audiences on two nights this fall. But like *Millionaire*, which started out with a younger viewing audience and saw it grow older the longer it was on the air, media buyers expect the same to happen to the *Weakest Link*.

Network execs are optimistic that the fallout of the dot-com business and the scaling back by Fortune 500 companies will only have a short-term effect on TV advertising. David Poltrack, executive vp of research and planning for CBS, said his research predicts that unlike the aftermath of the last big economic downturn in the early 1990s, there is no anticipation of a mass exodus of money out of the network TV for the long term.

"Advertisers will continue to be cautious until there are signs that the economy is getting better, but once they see those signs, they will begin to increase their TV ad dollars dramatically," Poltrack said. "The unrealistic dot-com ad dollars are now washed out of the system. There is still promise for the Internet, but the dot-com advertisers still around will reassert themselves in a more sober, sound way." ■

SPENDING

PAST		
1996		$14.7
1997		$15.2
1998		$16.3
1999		$18.0
2000		$20.3
PRESENT		
2001		$15.7
FUTURE		
2002	Veronis	+8%
	Zenith	+1%
	Pricewaterhouse-Coopers	+8.8%

All dollar values in billions. Source: Competitive Media Reporting, except 2001: Zenith Media Services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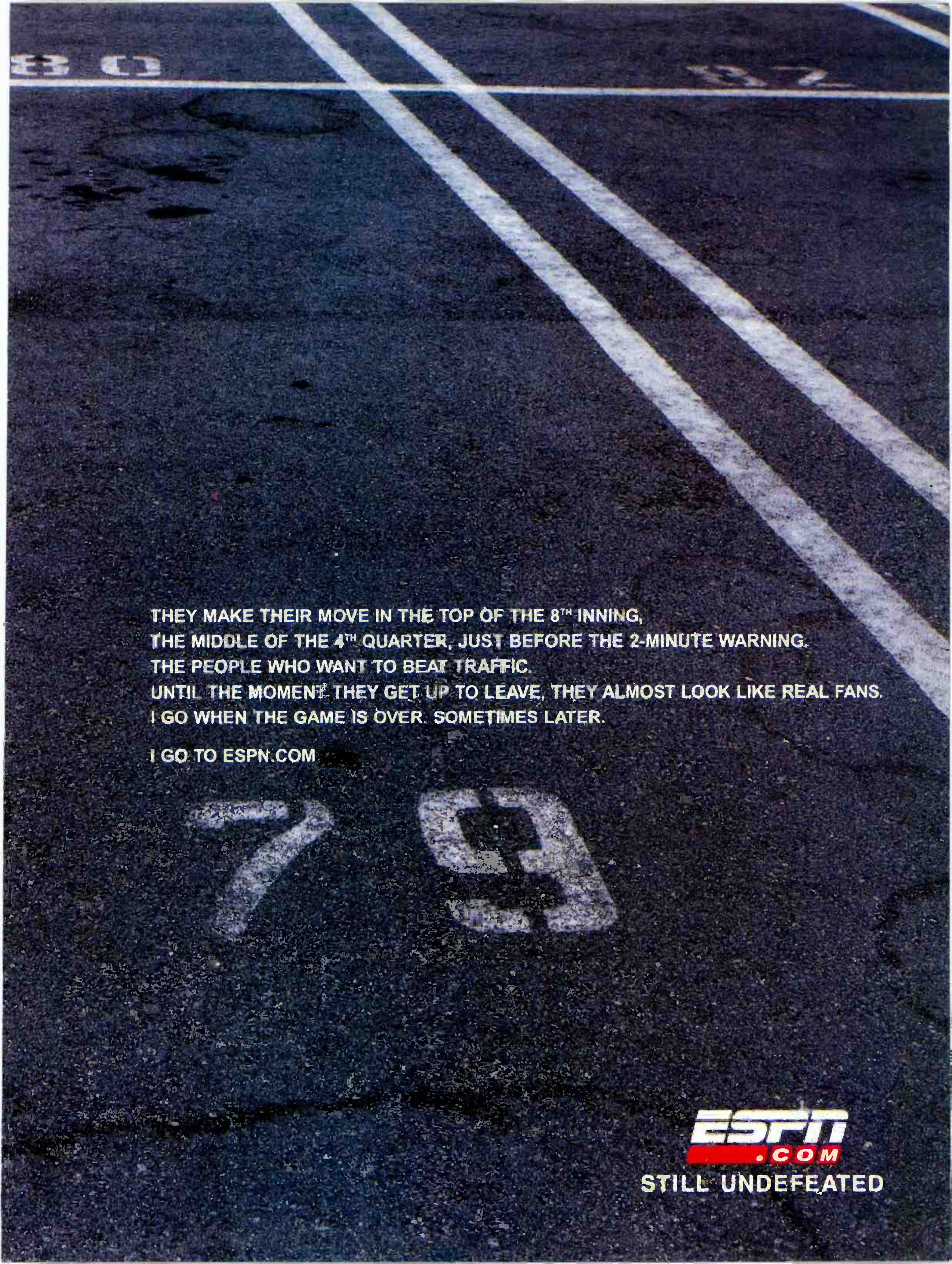

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THEY MAKE THEIR MOVE IN THE TOP OF THE 8TH INNING,
THE MIDDLE OF THE 4TH QUARTER, JUST BEFORE THE 2-MINUTE WARNING.
THE PEOPLE WHO WANT TO BEAT TRAFFIC.
UNTIL THE MOMENT THEY GET UP TO LEAVE, THEY ALMOST LOOK LIKE REAL FANS.
I GO WHEN THE GAME IS OVER. SOMETIMES LATER.
I GO TO ESPN.COM
79
ESPN.COM
STILL UNDEFEATED

Spot TV

A Vote for Local

POLITICAL RACES WILL HELP STATIONS IN 2002. BUT WHERE ARE THE AUTOMAKERS? BY JEREMY MURPHY

After a disastrous 2001, which saw spot advertising decline by as much as 9 percent (depending on which analyst you ask), there's still hope for next year.

Advertising is expected to actually grow in 2002, thanks, largely, to a competitive political season that will see 36 governorships, 34 Senate seats and the whole House of Representatives up for grabs.

"It's going to be a good year," said Chris Rohrs, president of the Television Advertising Bureau, predicting single-digit growth—4 to 6 percent—for 2002. "Local and national spot spending will outpace broadcast and cable, mainly because of the political races."

The news couldn't come at a better time for stations, which are still being battered by a soft spot economy. With the Big Three domestic automakers—Ford, General Motors and DaimlerChrysler—continuing to whack their ad budgets (they're down almost 25 percent in spot advertising so far this year, to $740 million compared to 2000's $987 million, according to CMR) and economic uncertainties forcing other major advertisers to trim back their ad spending, stations have had a pretty bleak 2001.

The TVB's Rohrs says spot will outpace broadcast and cable in 2002.

"It feels like the bottom. It does feel like there's going to be a turnaround," said Victor Miller, managing director/media analyst for Bear Stearns, at TVB forecasting conference held earlier this month. Miller predicts a five to eight percent increase in spot advertising for 2002.

Zenith Media, which forecasted a 4 percent decline in spot spending for 2001, predicts a slight upturn in 2002, to $24.3 billion from $23.4 billion. Veronis Suhler, meanwhile, predicts a 5.8 percent growth for spot spending in 2002, thanks to political spending. That's a lot better than the 3.1 decline it forecasted for spot spending in 2001, which could get even worse if current market conditions hold out.

Spot TV is looking to Detroit for strong growth next year. The TVB is also predicting that domestic automakers will increase their spending in 2002 after losing marketshare this year to foreign competitors. The big three posted a 21 percent decline in automobile sales from January to May of this year, according to CMR, and TV execs are quick to blame at advertising cuts.

"Auto leads you there and auto takes you out," said Miller, noting the drop in automotive spending put stations on a downward tailspin, but an increase will bring them out of it.

"They've chosen to pull back their spending while everyone else has maintained or increased theirs," Rohrs said. "We figure they'll figure it out," Rohrs said, predicting the domestics will start pumping more money into local markets.

One already has. General Motors, which has dramatically slashed its spot spending by more than 32 percent this year (to $155 million from $228 million) after pulling the plug on more than 900 local dealer advertising groups in 1999, has gone back to its dealers with a plan to spend more local dollars in markets across the country. The automotive giant, which has seen its share of the U.S. car market fall to 27.6 percent from 28.1 percent, has revived more than 200 dealer advertising groups across the country with the goal to spend more money at the local level in television, radio and print.

"Foreign automakers continue to be more aggressive advertisers than their domestic peers, and consequently have gained marketshare," wrote James Marsh, managing director and senior research analyst at Robertson Stephens, in a 2001 outlook. Marsh points to Toyota, which increased sales by 7.1 percent in July; Volkswagen, up 6.2 percent that month and Audi up 21.8 percent.

But the foreign automakers don't come near making up the gap in domestic spending, which is why stations are now concentrating on a new sales effort—local, local, local. Station groups like Sinclair Broadcasting (owner of 63 network-affiliated stations) and Hearst-Argyle (owner of 23 network-affiliated stations) are trying to re-adjust their national-to-local sales ratio in favor of local advertising, given the fallout from national ad dollars. ■

SPENDING

PAST		
1996		$14.0
1997		$14.5
1998		$15.5
1999		$15.4
2000		$17.4
PRESENT		
2001		$23.0
FUTURE		
2002	Veronis	+5.8%
	Zenith	+1.5%
	Pricewaterhouse-Coopers	+7.6%

All dollar values in billions. Source: Competitive Media Reporting, except 2001: Zenith Media Services

Cable TV

ERIK HEINILA/TNT PHOTO

Howard Cosell–era Monday Night Football is tackled in TNT's *Monday Night Mayhem.*

Let's Get Digital

NEW TECHNOLOGY AND BETTER ORIGINAL PROGRAMMING HELP POISE CABLE FOR THE FUTURE

BY MEGAN LARSON

The continued dormancy of the economy has only helped harden the negative fiscal outlook developed this year by first-hand recipients of the downslide, but cable is still a growth area, according to most analysts' reports this year. Direct Broadcast Satellite (DBS) is still making inroads, but the onset of digital cable, which offers subscribers many of the advantages of satellite, has helped cable operators stay on top.

Moreover, small-to-mid-tier cable networks are quickly gaining full distribution in the 80 million-plus homes across the U.S., and because many sales executives suffered assaults on CPMs during this year's upfront, ad dollars can only climb in 2002.

The total number of cable subscriptions will increase at an annual rate of 0.7 percent, reaching 69.4 million in 2002 and 70.7 by 2005, according to Veronis Suhler. DBS will slow significantly compared to the last five years, but is expected to remain aggressive at 10.6 percent, hitting 20 million subscribers next year and 22 million in 2005.

The future of cable is still going to be the bundling of services: video, telephony and high-speed Internet access. Cable services like Video-on-Demand, Interactive television and other benefits of a two-way infrastructure—targeted advertising and e-commerce—haven't yet emerged, but will play greater roles in the next few years. But the use of cable modems, which currently only serve an estimated 10 percent of online subscribers, will grow threefold by 2005, according to Veronis.

License fees that cable operators pay out for basic cable will increase 14.4 percent to 7.6 billion next year, according to Veronis. And premium channels will increase 8.8 percent next year, to $4.6 billion.

Compared to previous years of robust growth, cable/satellite ad spending screeched to a crawl in 2001, increasing 5.5 percent to $14.5 billion—and even this prognosis is considered optimistic. "We locked down these numbers in April and May, so we recognize that the weakness has continued beyond what we saw in mid-second quarter," said Jim Ruthurford, executive vice president of Veronis Suhler. "Can there be enough money in fourth quarter to make up for what happened in the upfront? Good question."

However, with spending from the computer software and telecommunications sectors coming back and the pharmaceutical category staying on track, ad dollars are expected to grow 14.2 percent, to $16.5 billion, in 2002, according to Veronis. The growth rate does diminish slightly in the following years, growing at an annual rate of 11.6 percent through 2005. Other analysts, however, are less bullish.

The rapid subscriber growth of the younger networks this year has generated more money for lower-tier cable by way of subscriber fees, but it also created more rating points in 2001 than the available money in the market could chase. The growth has eaten into the share of fully distributed cable networks, which have enjoyed the largest slice of the ad pool due to their size. According to Starcom Entertainment's annual *Insiders's Guide*, there are 31 cable nets reaching more than 65 percent of households (as opposed to 20 in 2000), and 26 of them reached 70 percent of households.

Going forward, original programming is key to the bottom line. Develop one popular TV show and a network can increase carriage fees, lock in a few more ad dollars and generate profit through international distribution and home video. Though rerunning broadcast content costs less and is guaranteed to attract viewers, Starcom's report asks an important question: "With all the repurposing currently happening, will off-network series retain any viewer interest by the time their network runs are over?"

Beginning last fall through the 2001-2002 season, cable nets like Lifetime, TNT, ESPN and VH1 have grown their original programming output. TNT, for instance, will kick off 2002 with its high-budget biopic about the genesis of Monday Night Football, *Monday Night Mayhem.*

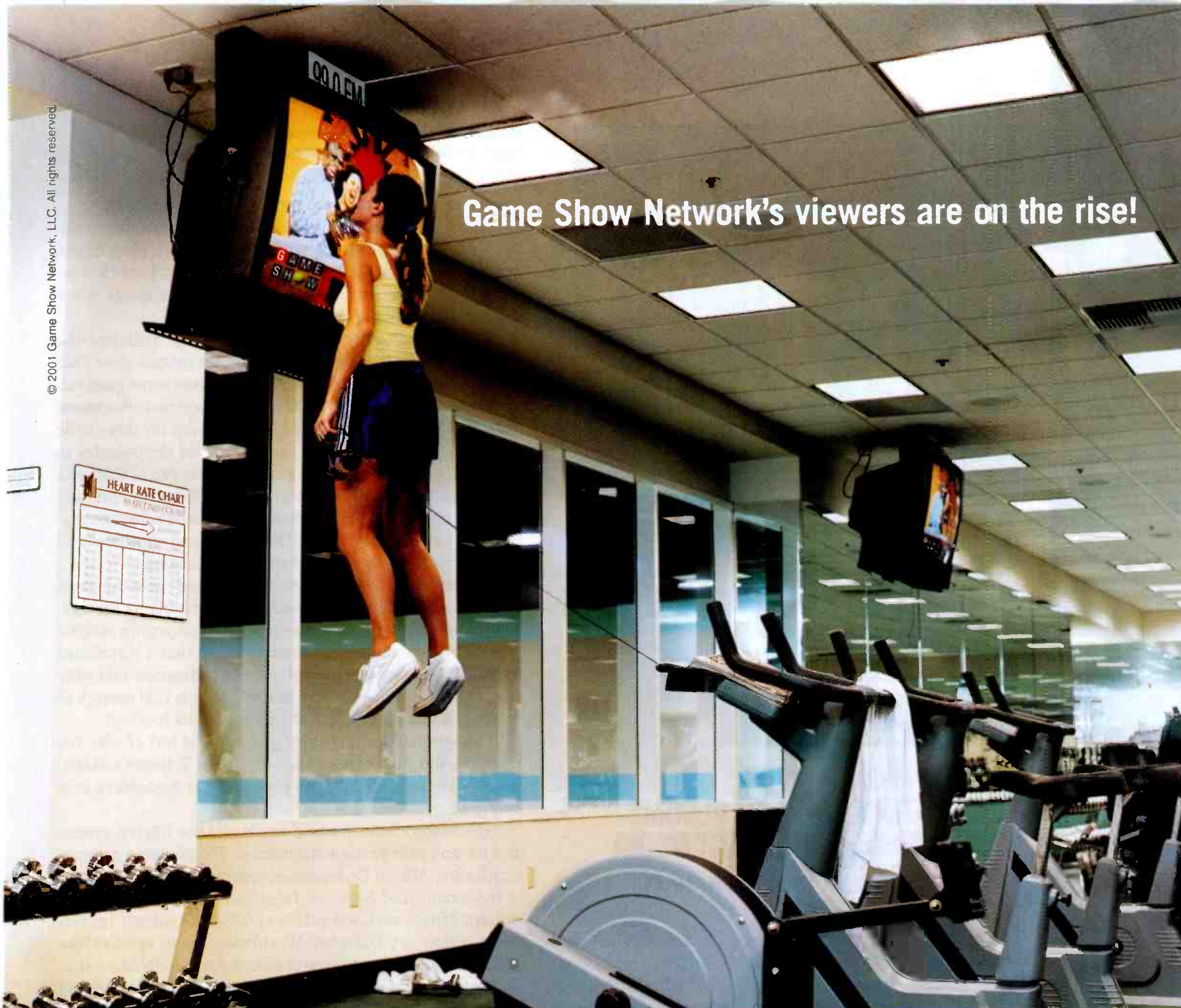
According to Kagan World Media, cable spent an estimated $4 billion in original programming this year and will spend around $5 billion in 2002. According to Starcom, programming will also make or break a network when digital is more widespread.

"One of the largest benefits of a fully digital viewing experience is the leveling of the programming playing field. Each channel will have an equal shot at a viewers' attention and will live or die based on the effectiveness of programming," the report stated. ■

SPENDING

PAST		
1996		$4.7
1997		$5.8
1998		$6.7
1999		$8.9
2000		$10.2
PRESENT		
2001		$9.8
FUTURE		
2002	Veronis	+15.7%
	Zenith	+4%
	Pricewaterhouse-Coopers	+23.3%

All dollar values in billions. Source: Competitive Media Reporting, except 2001: Zenith Media Services


Game Show Network's viewers are on the rise!
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GAME SHOW

Syndication

All talk: Tribune Entertainment is looking for shows such as *Talk or Walk* to prime the barter pump.

Getting With the Plan

AFTER A PAINFUL YEAR, SYNDICATORS VOW TO BECOME MORE TOP-OF-MIND WITH MEDIA STRATEGISTS

BY DANIEL FRANKEL

Despite an upfront that some have labeled disastrous, media merchant bank Veronis Suhler predicts that syndication's barter advertising market will finish 2001 only down 3 percent from the year before.

"Part of our argument is that the economy will pick up in the second half of this year," says Leo Kivijarv, director of publications for Veronis and editor of the bank's annual communications industry forecast. "So, barter syndication will end up not being hurt as badly as it is now."

Veronis also predicts that the barter syndication market will end 2002 up 4.8 percent over this year. "We're very bullish on 2002," Kivijarv explains. "We've seen over the years that when the economy picks up, advertising rebounds very quickly."

Wrapping up an upfront estimated to be in the $1.5 billion range by some buyers, 25 percent off from last year, media sales executives seem a bit more subdued in their optimism.

"We're encouraged a little bit because there's some scatter money available in September," says Clark Morehouse, senior vp, ad sales, Tribune Entertainment. "There's money out there somewhere. We'll be in better shape when *Talk or Walk* puts up good ratings."

Indeed, syndicators of daytime strips like Tribune—the company premiered the relationships-themed talk show *Talk or Walk* Sept. 17—would greatly benefit from some good ratings this fall for shows scheduled in mornings and afternoons.

In fact, it would seem absolutely necessary for there to be ratings improvement in this time period for the industry to find itself down only minus 3 percent at the end of this year.

Ratings for syndicated daytime programs had already been slumping across the board last season before discounted network daytime CPMs lured away significant ad dollars traditionally earmarked for syndication.

Their upfront following both network and cable this year, syndicators encountered greatly reduced budgets for daytime programming, particularly for new, unproven strips.

Both buyers and sellers seem to agree that a significant amount of money was pulled out of syndication this year simply because the industry as a whole didn't do enough to sell media planners on the efficiencies of its medium.

"The syndication industry got planned out of way too many media plans this year," explains Tribune's Morehouse. "We're still trying to convince our customers that syndication is valuable."

"Syndicators have focused mostly on the buying groups and haven't paid enough attention on the planning community," adds Allison Bodenmann, newly departed president of the Syndicated Network Television Association.

John Muszynski, executive vp/chief broadcast investment officer at Starcom Worldwide, says syndicators should establish a stronger presence for the SNTA so that the organization can lobby advertisers similar to the way the Cable Advertising Bureau champions its industry.

"Agency planning and strategy groups know less and less about syndication's benefits," he says. "Thus, media plans have less and less syndication in them. There are some huge advantages to being in syndication, yet syndicators aren't out there touting them. Instead, they came in this year ripping their competition. Meanwhile, the syndie pie is shrinking, and they're not trying to increase the size of the pie."

While they may have lost a significant piece of that pie to the broadcast and cable nets this year, syndicators for the most part say there's still enough money out there to make minus 3 percent this year—and nearly plus 5 percent next year—a realistic forecast.

"There's still a lot of money out there that people have been holding back, waiting to see if the economy turns around," says Bodenmann.

"I think as it was getting close to the upfront and all these bad reports about the economy were coming out, it forced brand managers to get really introspective and focus on the short term," Morehouse adds. "I think there is money out there, it's just locked into marketing plans that haven't been executed yet." ■

SPENDING

PAST		
1996		$2.3
1997		$2.5
1998		$2.7
1999		$3.0
2000		$3.2
PRESENT		
2001		$2.2
FUTURE		
2002	Veronis	+4.8%
	Zenith	-3%
	Pricewaterhouse-Coopers	+4%

All dollar values in billions. Source: Competitive Media Reporting, except 2001: Zenith Media Services

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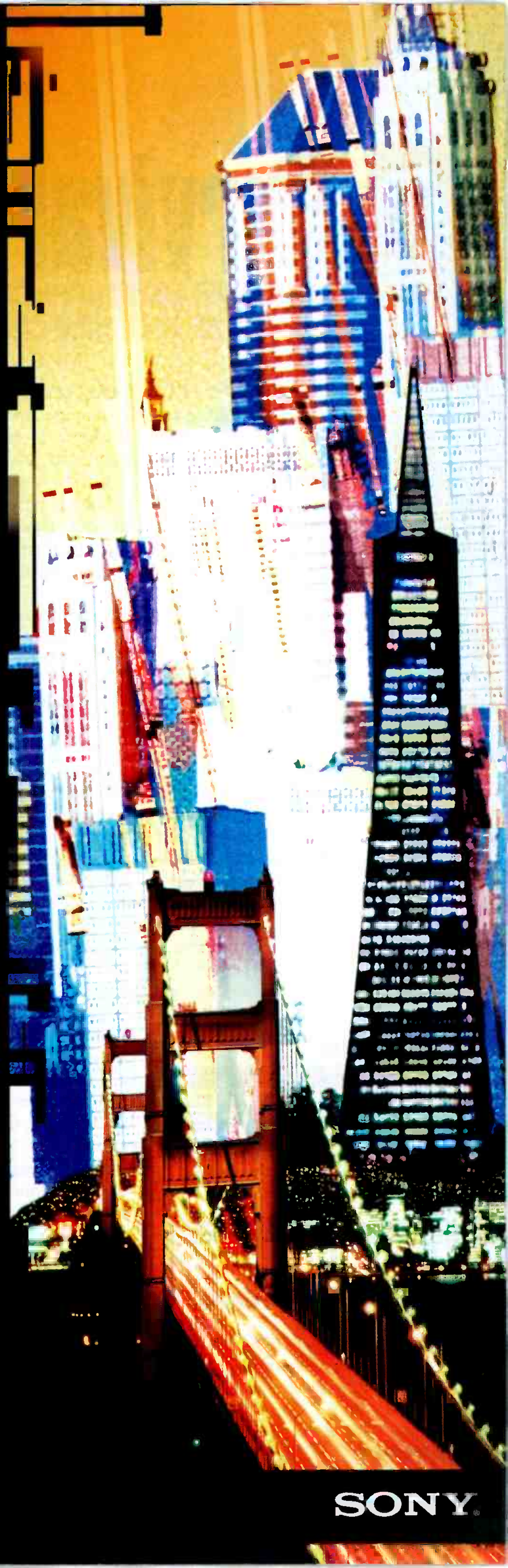


SONY

Consumer Magazines

Survival of the Fittest

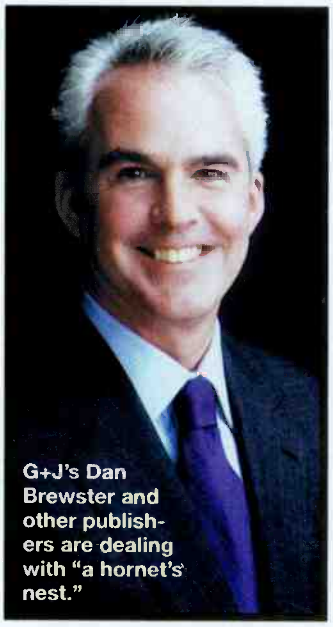
DARWINIAN LOGIC APPLIES AS MAGAZINES ARE FACED WITH A RANGE OF ECONOMIC CHALLENGES

BY LISA GRANATSTEIN

Times are troubled, but there still is reason to hope in 2002. Analysts in early September were far more optimistic than publishers. Most likely because 2001 has proven to be a strange odyssey, with key advertising categories—technology, financial services and retail—down double-digits, and overall circulation largely in the doldrums. Piling on to this heap of trouble has been the burden of ever-rising postal rates.

"I don't think anyone would have predicted the situation we are in today would be as dramatic as it is," notes Dan Brewster, G+J USA president/CEO, publisher of *Fast Company* and *Rosie's McCall's*. "Right now, it's survival of the fittest."

That said, forecasters predict calmer seas ahead. PricewaterhouseCooper's Global Entertainment and Media Outlook predicts a 4.9 percent growth spurt compounded annually over five years to $28.9 billion in 2005, while Veronis Suhler Communications Industry Forecast for the same period projects a more modest compounded annual growth of 3.7 percent, reaching $25.5 billion. In the short term, Zenith Media sees magazine spending being off 1 percent next year to $16.4 billion and up 2 percent in 2003 to $17 billion.



G+J's Dan Brewster and other publishers are dealing with "a hornet's nest."

SPENDING

PAST		
1996		$12.2
1997		$13.7
1998		$14.8
1999		$16.6
2000		$18.9
PRESENT		
2001		$16.8
FUTURE		
2002	Veronis	+5.0%
	Zenith	-1%
	Pricewaterhouse-Coopers	+7.7%

All dollar values in billions. Source: Competitive Media Reporting, except 2001: Zenith Media Services

"Based on what we've noted in the past, the year after a recession—or in this case an economic slowdown—the recovery is stronger than expected," says Leo Kivijarv, director of publications for Veronis Suhler. "We're forecasting the economy will turn around in the second half of next year—and ads will pick up, almost hitting levels experienced in 1999."

The pace of compounded annual growth in ad spending will slow during the next five years to 4.5 percent compared to the 8.9 percent experienced for the five years beginning in 1996, due to a decline in automotive, dot-com and tobacco spending. However, advertising is projected to increase next year by 5 percent, to $13 billion, according Veronis Suhler.

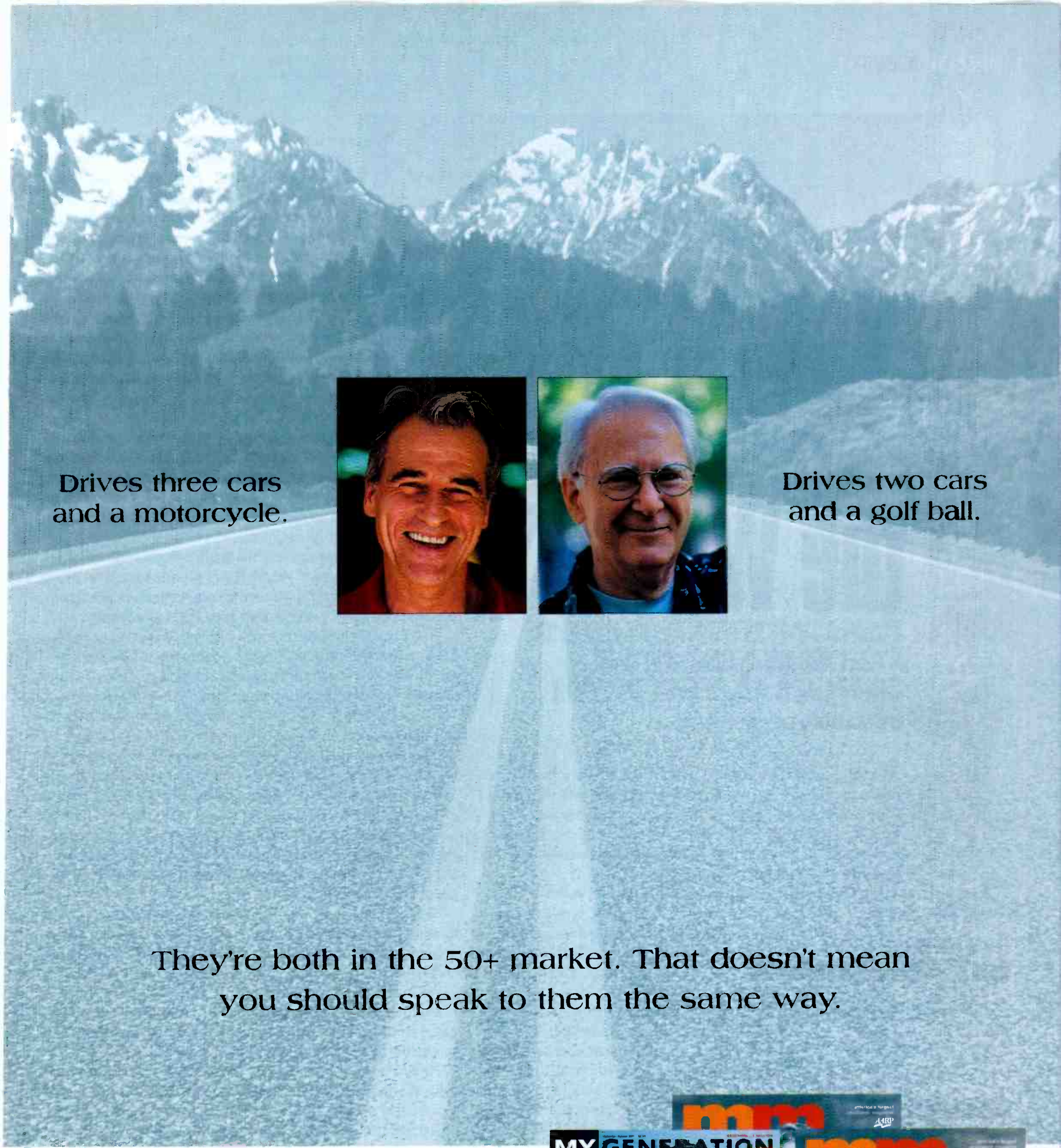
There are, however, a number of unknowns that could cloud forecaster's crystal balls. Most notable, says Ellen Oppenheim, the Magazine Publishers of America's executive vp/chief marketing officer, is the impact of government regulation on direct-to-consumer advertising, which could affect drug spending in all media, not just magazines. Also, Big Tobacco continues to choke publishers, with cuts in spending that in recent years have seriously hurt magazines that have been deemed to have a large youth readership.

Even before the economy took a turn for the worse, circulation—both subscription and newsstand—had been a very serious problem. Unfortunately, Veronis Suhler does not predict good times ahead. Circulation's compounded five-year annual growth ending in 2005 will only increase by 2.5 percent, to $9.6 billion. Circ spending in 2001 will only grow 1.9 percent, and 2002 will climb by 2.2 percent to $8.9 billion. With no model truly replacing the stamp sheets, and online subs working for a select few titles, subscriptions will be down 0.4 percent in 2002, and compounded annually in five years will fall only marginally, down 0.2 percent.

Meanwhile, newsstand sales will continue to be a headache. Single copy sales also will decline, down 2.1 percent in 2002, and down 2.1 percent compounded annually over a five-year period. "Retail distribution and subscription acquisition are affecting publishers' P&Ls almost as much as as the advertising shortfall," says Brewster. "Layer postal on top of that and you've got a hornet's nest."

On a brighter note, publishers are now understanding the Web a little better. More publishers are melding their Internet divisions into the rest of the company, rather than keeping them separate, says Veronis Suhler. The challenge for publishers will be finding creative ways of drawing readers to the companion sites. Also, advertisers will continue demanding innovative multiplatform marketing programs.

"Going forward, we're going to be selling hard the intimacy of the relationship between our reader and the magazine and how that is stronger than any other medium," says Brewster. "What I'm hopeful about is that the marketplace will respond to the Darwinian laws of supply and demand. Magazines with a clearly articulated voice, which resonates with an audience, will succeed." ■



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Meeting of the minds: Conventions and seminars are a significant portion of the B-to-B revenue stream.

Spreading the Wealth

EMBRACING ALTERNATIVE REVENUE STREAMS MAY GIVE B-TO-B COMPANIES AN UPSIDE IN 2002

BY MARIAN BERELOWITZ

While media merchant bank Veronis Suhler predicts that advertising in trade magazines will drop more than in any other media segment this year, the industry's evolution toward a diversified business model has meant a fair amount of stability among business-to-business companies and strong chances of recovery in 2002.

Leveraging the reputations of their print products, most B-to-B companies have extended their focus to trade shows and conferences, online efforts and research tools. All of which makes the industry far less reliant on magazines for profits—a great benefit when advertising spending drops 9 percent in one year, as Veronis Suhler is forecasting.

Ad spending should pick up next year, with Veronis predicting a 6 percent increase and the industry group American Business Media looking for a 5 percent bump. But the ABM sees growth coming only in the second half.

Better news for the industry is that trade shows and exhibitions will grow by 5 percent this year and 7.4 percent in 2002, to $7.1 billion, according to Veronis.

SPENDING

PAST		
1996		$6.5
1997		$7.0
1998		$9.04
1999		$9.08
2000		$10.0
PRESENT		
2001		$9.3
FUTURE		
2002	Veronis	+6%
	Pricewaterhouse-Coopers	+8.6%

All dollar values in billions. Source: Competitive Media Reporting, except 2001: Veronis Suhler

Construction-focused company Hanley-Wood is one B-to-B profiting from the trade-show boom. Five years ago, print represented about 95 percent of revenue, says president Frank Anton, while now it's slightly more than half. The company entered the trade-show arena in earnest just two years ago—"one of the best business moves we ever made," Anton says.

In the print arena, "advertisers have pulled back this year in a way that is noticeable," Anton says, even though the housing industry has suffered far less than others. "As advertisers budget for next year, they will be very conservative."

For media-technology company IDG, the strongest sector this year is research, says president and CEO Kelly Conlin. "In times like this, research tends to be the most resilient market, because anxiety leads to questions," he says. Events such as seminars are also doing well. "People want group therapy," he jokes.

IDG's growth prospects lie in global extensions of its products, Conlin says. While U.S. revenues are down several percentage points, international revenues are growing as much as 12 percent this year for the company.

For B-to-B, the Internet still has solid revenue potential. Use of the Web is particularly adaptable to the industry, which has "defined audiences that can be worked," says Roland DeSilva, managing partner at media investment bankers DeSilva & Phillips. Two popular approaches are selling sponsorships on Web sites and building online databases.

One area of optimism is the telecommunications sector, which will be up 8 percent this year, according to Veronis Suhler. Technology is by far the largest segment of the B-to-B industry, and, not surprisingly, it saw a drop of 10 percent this year, to $2.2 billion. Other big decreases were recorded by healthcare (a whopping 35 percent), advertising/marketing (25 percent) and broadcast/motion pictures (10 percent).

"We are still very confident that the tech category will continue to be a vital ad market, because it's hard to imagine a company or industry or country that isn't dependent on technology and the Internet for its growth and prosperity," says Conlin. "The absolute dollars are still tremendous."

Conlin sees lucrative potential in the area of biotechnology, around which IDG is launching a new trade show and magazine in the first quarter of 2002.

Healthcare was the second largest B-to-B category last year but dropped to fourth this year with $530.3 million in ad revenue, according to Veronis Suhler. The decrease is largely attributable to the FDA's slowness in approving new drugs, but also to the fact that spending on consumer media has greatly increased. But if new products come into the pipeline, as expected, "we should see some substantial advertising starting in the late second quarter," says DeSilva.

Healthcare is, in fact, predicted to rebound by a full 25 percent next year, technology by 6 percent. And Veronis forecasts increases of between 4 percent and 8 percent for most categories. "You can't stay out of advertising your brand in a B-to-B," says DeSilva. ■

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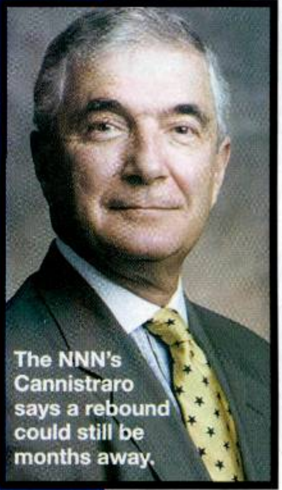
The NNN's Cannistraro says a rebound could still be months away.

Nowhere But Up

AFTER A DISMAL YEAR, WILL RETAIL DOLLARS BUOY THE BOTTOM LINE FOR PUBLISHERS? BY TONY CASE

Say one thing for hitting bottom—there's nowhere to go but up.

It stands to reason that if newspaper advertising has reached bedrock—which some analysts and publishers seem to think it has—then next year is shaping up to be comparatively robust.

The investment firm Veronis Suhler predicts daily newspaper ad spending will jump 4.2 percent to $49.86 billion next year, compared to this year's 1.7 percent decline. PricewaterhouseCoopers projects a slightly more hopeful 5.6 percent uptick in 2002, compared to this year's 2.7 percent growth, while the industry's trade group, the Newspaper Association of America, expects a 4 percent spike next year, compared to a 2.9 percent drop in 2001.

Retail advertising, still newspapers' greatest moneymaker, will grow 5 percent to $23 billion in 2002, more than double the 2.4 percent growth of this year, according to Veronis. Classified, the second-biggest segment, will inch up 2.3 percent to $18.89 billion, compared to this year's bruising 5.8 percent loss. Finally, national advertising, still the smallest category for newspapers, will rise 6.7 percent to $7.96 billion, a clear achievement compared to this year's 2.5 percent dip.

The NAA also predicts that all three ad sectors will see improvement in the coming year—with retail up 3.4 percent, classified 4 percent and national 5.8 percent.

Considering all the bad economic news that continues to dominate the headlines, could those numbers be too optimistic? Perhaps.

Expectations "could be off because of predictions about a better economy sooner," admits Veronis managing director Robert Broadwater.

"We thought this would be a fairly sharp but short contraction," he said. "That hasn't yet been the case."

Miles Groves, chief economist for the newspaper adviser The Barry Group, adds, "We may be at the cusp of a traditional recession here, and if that's where we are, my prognosis for next year would be very negative." Even if fourth quarter 2001 brings an economic turnaround, as some still expect, Groves predicts ad growth next year of only 3 to 3.5 percent.

Nicholas Cannistraro, the president and general manager of the national ad firm Newspaper National Network, says, "Having gone through a couple of these recessions, the amplitude of the drop is usually 50 percent from peak to trough, and the duration of the decline is as long as 18 months."

Others are more upbeat. Next year "is looking up, because, at least from where we stand right now, second quarter 2001 looks to be the trough in the current cycle," says NAA vp/market and business analysis Jim Conaghan. Next year, he adds, "should be a better year [for advertising], simply because the entire economy will see better performance." Conaghan says ad results in 2002 should get a boost from improved classified sales, which tanked this year.

As for retail, he points out the category has held up "relatively well" through the current malaise—largely due to growth in pre-prints, a trend he believes will continue. Retail should see respectable, if not "stellar," results in the coming year, he contends. As Veronis' Broadwater notes, "Newspapers are fairly durable franchises—their ads tend to be 'need-to-have' advertising for local merchants."

Meanwhile, the relatively small, but increasingly important, national category has been crushed by sharp spending reductions by major manufacturers looking to meet profit projections. The dot-com bust also hit national, though mainly large-circulation papers were affected. For the moment, gone are the spectacular double-digit gains of the late 1990s and 2000, spurred by increasing newspaper investment from the likes of Procter & Gamble and General Motors.

Still, according to the industry experts, national sales will see by far the greatest growth of the three major categories next year.

Despite the drop national advertising suffered this year, the NNN's business is actually up, taking in 50 percent more orders than last year, according to Cannistraro. National automotive, high-tech and pharmaceuticals all have been bright spots, while packaged goods remains a concern. Cannistraro says he would be "embarrassed" to predict that next year will be anything but flat compared to this year. ■

SPENDING

PAST		
1996		$38.1
1997		$41.3
1998		$43.9
1999		$46.3
2000		$48.7
PRESENT		
2001		$46.7
FUTURE		
2002	Veronis	+4.2%
	Zenith	-1%
	Pricewaterhouse-Coopers	+5.6%

All dollar values in billions. Source: Competitive Media Reporting, except 2001: Zenith Media Services

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Radio

Coming Home

WHILE NATIONAL SALES SLUMP, LOCAL AD DOLLARS MAY BRING RADIO STATIONS OUT OF THE DOLDRUMS

BY KATY BACHMAN

After posting 99 months of continuous revenue growth, radio slid into its worst ad market in a decade. Up against double-digit growth increases in 2000, the damage was hard to quantify; every major group consistently reported to Wall Street that it outperformed the market. Ever the optimists, it wasn't until mid-year that radio groups began to back-off second-half recovery predictions.

The RAB's Fries says radio was "a deer in the headlights" when the downturn began.

Consolidation plans interrupted by a shaky economy, deal activity was a mere shadow of last year's $25 billion in station trading and $28.5 billion in 1999 when merger mania was at its height. Through August, only $2.6 billion dollars involving 536 radio stations were traded in 2001 (about $2 billion was the Forstmann Little acquisition of Citadel Communications), according to BIA Financial Network.

Instead of transitioning into consolidated operating mode, groups were forced to take cost cutting measures in order to offset plummeting national ad sales, about 20 percent of radio's total revenue take. Stations in the largest markets, which are more dependent on national advertising, suffered the most.

"We weren't ready for the downturn, we were like a deer in the headlights," said Gary Fries, president of the Radio Advertising Bureau, who is hoping radio can end 2001 with flat growth.

Even though radio revenue began to show improvement in July, down 4 percent compared to May (-9 percent) and June (-8 percent), national is likely to remain off by 10 to 12 percent, making radio's chances slim for pulling revenue out of the negative column this year.

"For radio to be up for the year, it would have to blow the doors off fourth quarter ad sales and post increases of about 8 to 12 percent," said Lee Westerfield, an analyst with UBS Warburg, who predicts radio will end 2001 down 1 to 2 percent.

A roll of the dice may be as good as any prediction for how radio will perform in 2002. Forecasts have been all over the map, from negative 4 percent to plus 9.1 percent. "The industry may not reach its more normalized revenue growth rate of 6 to 8 percent until the second quarter of 2002, at least," said James Marsh of Robertson Stephens. He thinks radio will be up 4 percent in 2002.

"The radio ad market is still going to be bleak until we see a response in the economy. Even movies, which usually spend like crazy, are watching the dollars," said Howard Nass, senior vp/director of local broadcast for TN Media.

At the recent annual radio show held earlier this month, four of radio's largest advertisers—Procter & Gamble, Warner-Lambert, Sears and McDonald's—confirmed ad budgets would be flat for 2002.

Most agencies are expecting ad rates, which this year slid back to 1999 levels, are likely to stay that way at least through second quarter of 2002. The key will be local radio, which was down only 1 percent by July. Since retailers have to clear away inventory and auto dealers need to move cars off their lots, radio execs are banking that local picks up the slack from national.

Recent advertisers' actions back that up. General Motors, like most domestic automakers, pulled back national dollars this year and is expected to hold ad expenditures flat. GM is changing its strategy from a national ad platform to a regional one, giving its dealers more latitude. In Los Angeles, for example, auto advertising on radio has been up 21.8 percent through July, a trend that's likely to continue into the year.

"Our clients are budgeting more for local spot radio," noted Lori Wellinghoff, vp of Cincinnati-based Local Marketing Corp., who buys locally for clients such as Darden restaurants and Sam Adams beer.

Several groups—such as Emmis Communications, Clear Channel and Cox Radio—have decided the best way to bring the industry out of the ad slump and to prepare for its comeback is to hire more sales people. A practice made popular by Viacom COO Mel Karmazin in the days before Infinity became a part of CBS and Viacom, hundreds of new sales people will be peddling radio's inventory next year. ■

SPENDING

PAST		
1996		$12.2
1997		$13.4
1998		$15.0
1999		$16.8
2000		$18.9
PRESENT		
2001		$19.2
FUTURE		
2002	Veronis	+9.1%
	Zenith	-0.8%
	Pricewaterhouse-Coopers	+8.5%

All dollar values in billions. Source: Competitive Media Reporting, except 2001: Zenith Media Services

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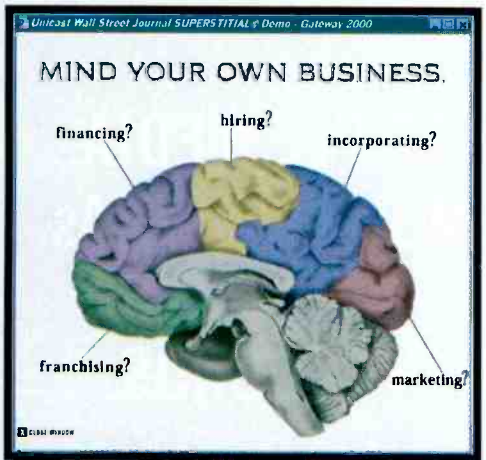
Interactive



Use of attention-grabbing Web ads, like this interstitial from *The Wall Street Journal*, will increase.

Online Ads, Part Two

NOW THAT DOT-COM DOLLARS HAVE ALL BUT DRIED UP IT'S TIME FOR A NEW BREED OF INTERACTIVE ADVERTISING

BY SARAH J. HEIM

Following three years of tremendous growth, online advertising hit the canvas with the one-two punch of the demise of many of the dot-coms that fueled online spending and a skittish marketplace that pulled back on spending across all media. But the Internet shouldn't be down for the count for long.

While the end of the dot-com boom may have misled marketers into equating dot-com businesses with the Internet as a viable marketing platform, more realistic expectations and an ever-growing audience will ultimately attract marketers back to the Internet in the coming year.

"Everyone is focusing on the short-term bubble that we were in," says James DePonte, a partner at PricewaterhouseCoopers. "But they're missing the big picture. The Internet is the best ad platform that exists today."

If DePonte's enthusiasm for the Internet seems unbridled, he supports his affection with facts: According to PWC's Global Entertainment and Media Outlook report, the number of households with Internet access will continue to rise, with current estimates of 54.3 million households with Internet access expected to explode to 70.5 million by 2005.

"The audience is online and has moved from many of the offline places to online," says Robin Webster, president and CEO of the Interactive Advertising Bureau. "If I'm an advertiser, I must communicate with my customers, and I need to go where they are."

Pricewaterhouse projects that media spending for Internet advertising and access will increase from $24 million this year to $27.3 million in 2002. The company cites that the slowdown in ad spending that occurred in the first half of 2001 will rebound by 2002, returning to high single-digit or even double-digit levels. Internet ad spending is expected to grow by 12.8 percent in 2002, as compared to 11.5 percent for total TV spending, PWC reports.

"We're already starting to see more interest in the Internet from major clients," says Adam Gerber, director of media strategy at the Digital Edge, the online and convergence planning and buying division of The Media Edge in New York. "It doesn't necessarily mean they're spending yet, but they are engaging us in discussions."

Gerber anticipates that after new budgets are allocated in January, the medium will start to see more mass advertisers who stayed on the sidelines during the dot-com frenzy, "not just dip their toes in, but dip in four of five toes."

That said, Gerber adds that the online media buys he's talking about won't be banners or buttons. "That's not the answer to how this medium will grow," he says. Gerber believes that marketers and publishers will have to aggressively look for new ways to make ads stand out on the Web, such as forcing users to watch a message before they can access content or by selling only one ad per page.

Pricewaterhouse's DePonte argues that more attention-grabbing advertising—such as streaming media units and rich-media interstitials—will gain prominence. Jim Nail, senior analyst at Forrester Research, agrees that larger, rich media-enabled ads "will pretty much be mandatory in the coming year."

Forrester Research predicts that advertisers will double online spending by 2003. In fact, Forrester concludes that marketers will begin to draw from offline marketing budgets to support online initiatives to the tune of $42 billion in worldwide online advertising spending by 2005.

Eric Picard, co-founder and director of product management of Bluestreak, a rich-media advertising service, says companies are spending money, but they're spending it more wisely on creative technologies and analytic packages. "They're also planning media buys more carefully to get more value for their money," he says.

Online marketing initiatives will take shape in the form of e-mail campaigns and online coupons, in addition to banner ads. "E-mail will be a big winner because it offers economy of scale and works so well with existing offline and online initiatives," says Tim Stock, founder and CEO of New York-based ScenarioDNA. "It's on par, budgetwise, with direct mail and offers greater measurement and targeting." ■

SPENDING

PAST		
1996		Not Available
1997		$0.5
1998		$1.0
1999		$1.9
2000		$3.0
PRESENT		
2001		$6.6
FUTURE		
2002	Veronis	+8.1%
	Zenith	+13%
	Pricewaterhouse-Coopers	+12.8%

All dollar values in billions. Source: Competitive Media Reporting, except 2001: Zenith Media Services

Smaller is Better

BUS SHELTERS, TRUCKSIDES AND OTHER "STREET FURNITURE" GIVE OUT-OF-HOME REASON FOR OPTIMISM

BY KATY BACHMAN

Outdoor

In the bigger-than-life world of outdoor advertising, it's the smaller boards in malls, airports and on transit platforms that are making the difference. Tracking on the better side of the ad downturn in 2001, outdoor may be the only medium that ends the year with positive growth.

While other media fell victim to the demise of dot-com dollars, it was a much smaller factor for outdoor. Although it contributed to outdoor's healthy 8.3 percent increase in 2000, it only made up about 1 percent of the industry's total $5.2 billion take.

Like other media, most of the weakness this year in outdoor was a falloff in national advertising, about 40 percent of the outdoor business.

As with all locally based media, outdoor has been tapping local advertisers to pick up the slack, building momentum as 2002 nears. Projections for 2001 vary between 2 and 5.8 percent increases. The Outdoor Advertising Association of America is sticking with a more conservative 2.5 percent increase in 2001.

For 2002, the OAAA is looking for 5 percent growth. Veronis, Suhler & Associates predicts a robust 8.4 percent. James Marsh of Robertson Stephenson is forecasting 4 percent growth, while Niraj Gupta of Solomon Smith Barney believes outdoor will post a 6 percent gain.

Growth isn't coming from rate hikes, but from certain segments of the business that are adding more inventory and offering more creative choices. While the inventory of large billboards is limited by local legislation, smaller boards are booming.

Diane Cimine, executive vp of OAAA, estimates that street furniture such as bus shelters and benches contributes about 17 percent of outdoor's total ad revenue. A popular form of advertising in Europe, street furniture is beginning to make inroads in the U.S. In Los Angeles, Viacom Outdoor (formerly known as Infinity Outdoor) joined with JCDecaux, the world's largest furniture company, to bid for the 20-year L.A. Coordinated Street Furniture contract, which includes 2,500 bus shelters, public toilets and other furniture.

"Some of my clients love the mall advertising and street furniture," says Pete Riordan, vice president and manager of out-of-home and nontraditional media for BBDO in New York. "It gets into suburban areas where regulations don't permit large outdoor boards."

Transit advertising, which accounts for about 17 percent of the outdoor business, is truckin', literally. In addition to the growing number of ads on buses and posters on train platforms, truckside advertising is catching on with a growing number of marketers. And that's not even mentioning ads in airports and other public transportation terminals.

"Airport advertising has been our strongest growth product because it focuses on the high-end traveler demographic," notes Paul Meyer, president and COO of Clear Channel Outdoor, who will succeed Karl Eller as CEO when Eller retires at the end of the year.

Advertising categories expected to come on strong in 2002 include fashion, retail, telecommunications (cell phones, wireless services), financial services (Visa, American Express), fast foods and entertainment (movies, cable networks). Soft for most of 2001, automotive should also come back.

Now that companies such as Clear Channel and Viacom control vast outdoor assets, they're working to deliver on the promise of cross-platform sales with radio, outdoor's kissin' cousin. So far, it's been slow-going. Not only are agencies not set up for it, they often insist on value-added deals.

"For us to look at cross-platform deals, the whole needs to be bigger than the sum of the parts; we have to get a deal," says Scott MacDuffie, senior vp and director of out-of-home media for Zenith Media Services. MacDuffie buys for big outdoor advertisers such as Verizon, Toyota and Lexus.

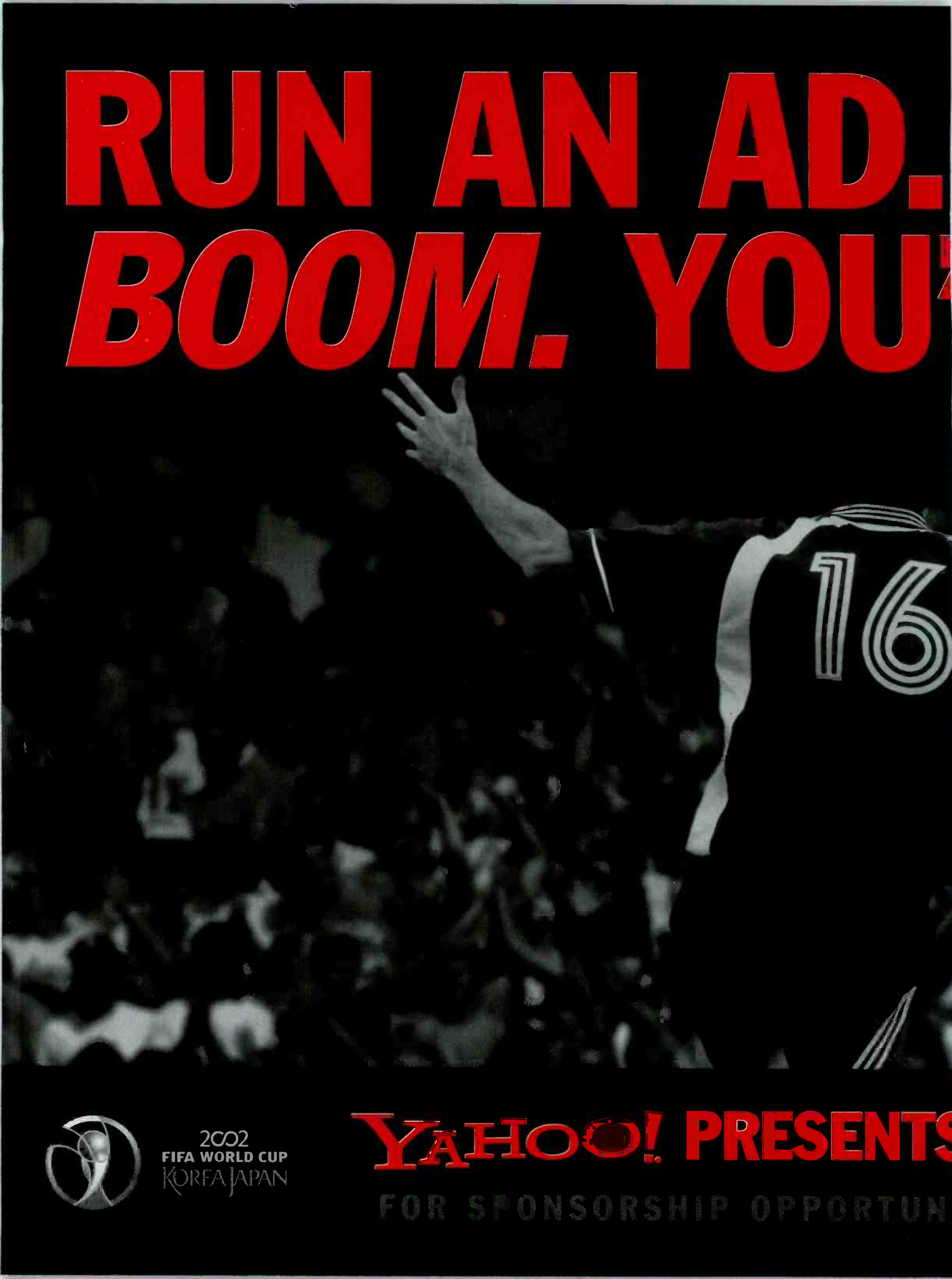
The industry is also hoping to capitalize on the Traffic Audit Bureau's new auditing system, which will allow boards to be audited more accurately and more frequently.

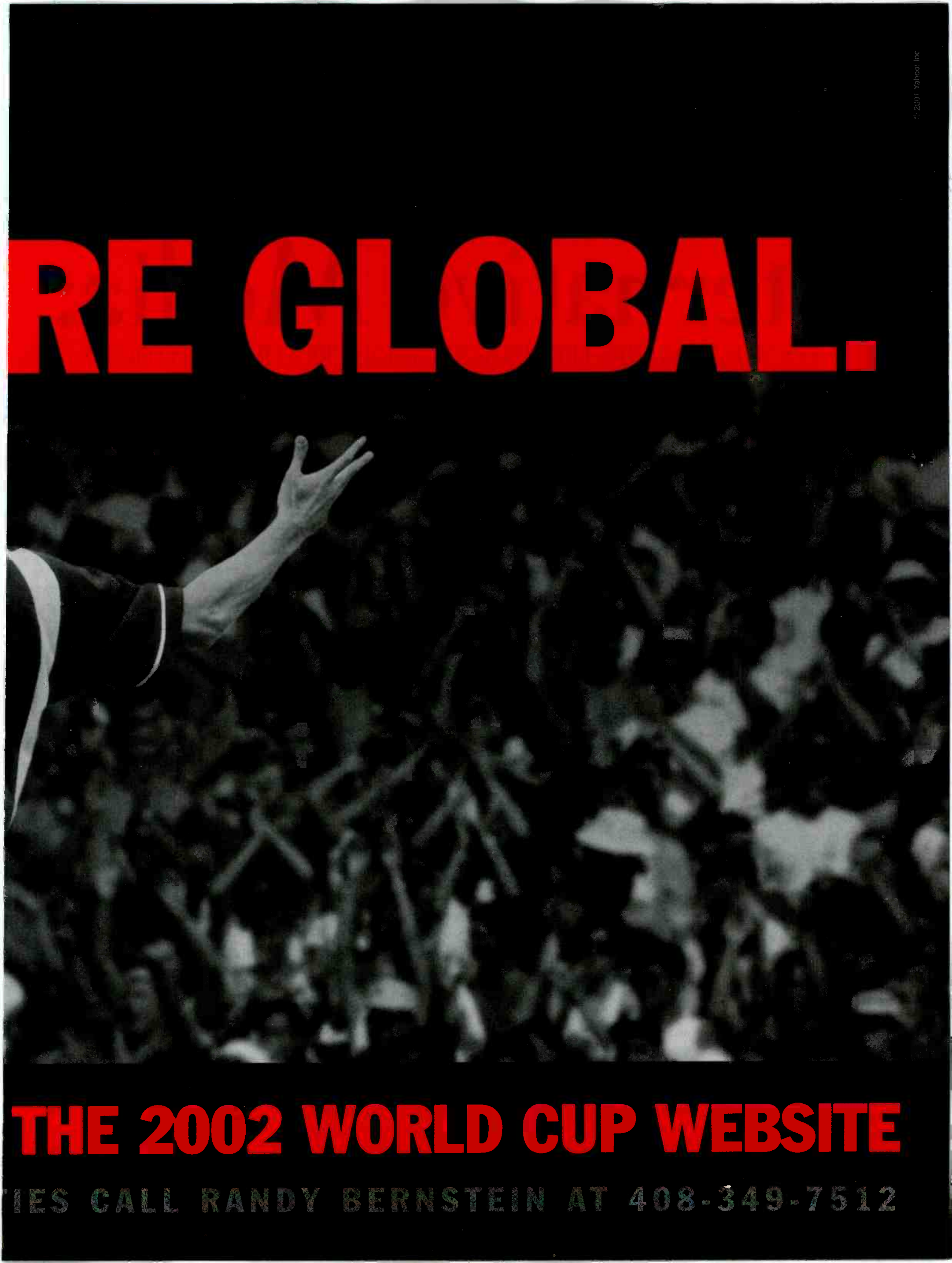
Outdoor's prospects look bright, but they could be even better. Says Cimine: "We're trying to get included more in multimedia planning models. Our goal is to make sure we're a part of that." ■

SPENDING

PAST		
1996		$3.7
1997		$4.0
1998		$4.4
1999		$4.8
2000		$5.2
PRESENT		
2001		$4.81
FUTURE		
2002	Veronis	+8.4%
	Zenith	+1%
	Pricewaterhouse-Coopers	+11.1%

All dollar values in billions. Source: Competitive Media Reporting, except 2001: Zenith Media Services


RUN AN AD.
BOOM. YOU
16
2002
FIFA WORLD CUP
KOREA JAPAN
YAHOO! PRESENTS
FOR SPONSORSHIP OPPORTUN



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THE 2002 WORLD CUP WEBSITE
IES CALL RANDY BERNSTEIN AT 408-349-7512

OAAA

OUTDOOR ADVERTISING ASSOCIATION OF AMERICA, INC.

Alternative Media:

A KEY TOOL FOR MARKETERS IN SEARCH OF CREATIVE SOLUTIONS

What counts as Alternative Advertising?

What, exactly, constitutes outdoor advertising today? It's almost everywhere you look - and it's among the most flexible media available. It's also an easy way to target an audience, and an effective way to establish brand identification. Here are just a few of the media that constitute outdoor advertising:

ALTERNATIVE
stadium/arena/speedway advertising • airborne/airship display • marine vessel display • gas pump panel • place based advertising

BILLBOARDS
bulletin • 30-sheet poster • 8-sheet poster • wall mural • wrapped poster

STREET FURNITURE
bus shelter panel • convenience store advertising • shopping mall advertising • bus bench panel • public telephone panel

TRANSIT
vinyl wrapped bus • subway and rail advertising • airport advertising • truckside panel • taxi panel

by Emily Rubin

Outdoor advertising isn't just "your father's billboards" anymore! A whole new universe of venues has emerged to reach consumers head-on during the course of daily life. Among the most innovative outdoor ad media are those that fall into the subset of "alternative media." Originally developed to bridge the media gap in urban centers, alternative media has grown into a sophisticated billion-dollar business. And it's taking advertising and marketing in some remarkable new directions.

The emergence of alternative media has forever changed the advertising landscape. No space is too big or too small -- or even too public or too private -- for an advertiser's message. And that's good news for marketers who are looking to capture their audience's imagination and buying power in new ways. Wherever a target audience may be -- at a family amusement park, at the movies, on the beach, in an elevator, in restaurants, even in a public bathroom -- there's a good likelihood that a savvy marketer got there first.

Among alternative media's most obvious benefits are creativity and the element of surprise. Others include its ability to target an audience even more directly than traditional media and its synergy with micro markets. Chip Fisher, chairperson of the Alternative Media Council, an entity overseen by the Outdoor Advertising Association of America (OAAA), says, "Alternative media is a huge area of growth within outdoor advertising, and it will continue to explode in this decade as marketers focus on global branding on an increasingly emotional level. And as television and radio continue to fragment, alternative media will become a better advertising buy. Many marketers are investing their branding dollars in alternative media now because there's a great PR value in it as well."

A Historical Perspective

To understand the value of alternative media, it's helpful to have some background on its "forefather," outdoor media. The most obvious example of outdoor media is the billboard, which has been around over 100 years. The discipline required to create effective, normally one-dimensional ads yields a medium that perfectly suits today's fast-paced society. Billboards done well get attention: they grab you, they make you look, they brand! Add in the newer technological enhancements of today, and billboards become a veritable theater of the streets.

In many ways, outdoor advertising is the first true advertising medium. Its origins can be dated back to more than five thousand years ago, with hieroglyphics etched on obelisks -- among the earliest known ways of communicating a message to a group of people. Outdoor advertising's next truly epic step was achieved in 1450, with the invention of movable type printing by Johannes Gutenberg. That event represented the birth of advertising as we know it, in the form of the handbill. By 1796, the lithographic process had been greatly improved, and the illustrated poster became a reality. The first large American outdoor poster -- more than 50 square feet in size -- originated in New York, where a printer named Jared Bell printed posters for the 1835 circus season. American roadside advertising was the next phase, promoting local businesses to passing stagecoaches. Merchants painted signs or glued posters on walls and fences to notify customers that their establishments up the road offered horse blankets, rheumatism pills, and the like. By 1850, exterior adver-

Beach 'N Billboard

oaaa
OUTDOOR ADVERTISING
ASSOCIATION OF AMERICA, INC.

tising had spread to street railways in major cities.

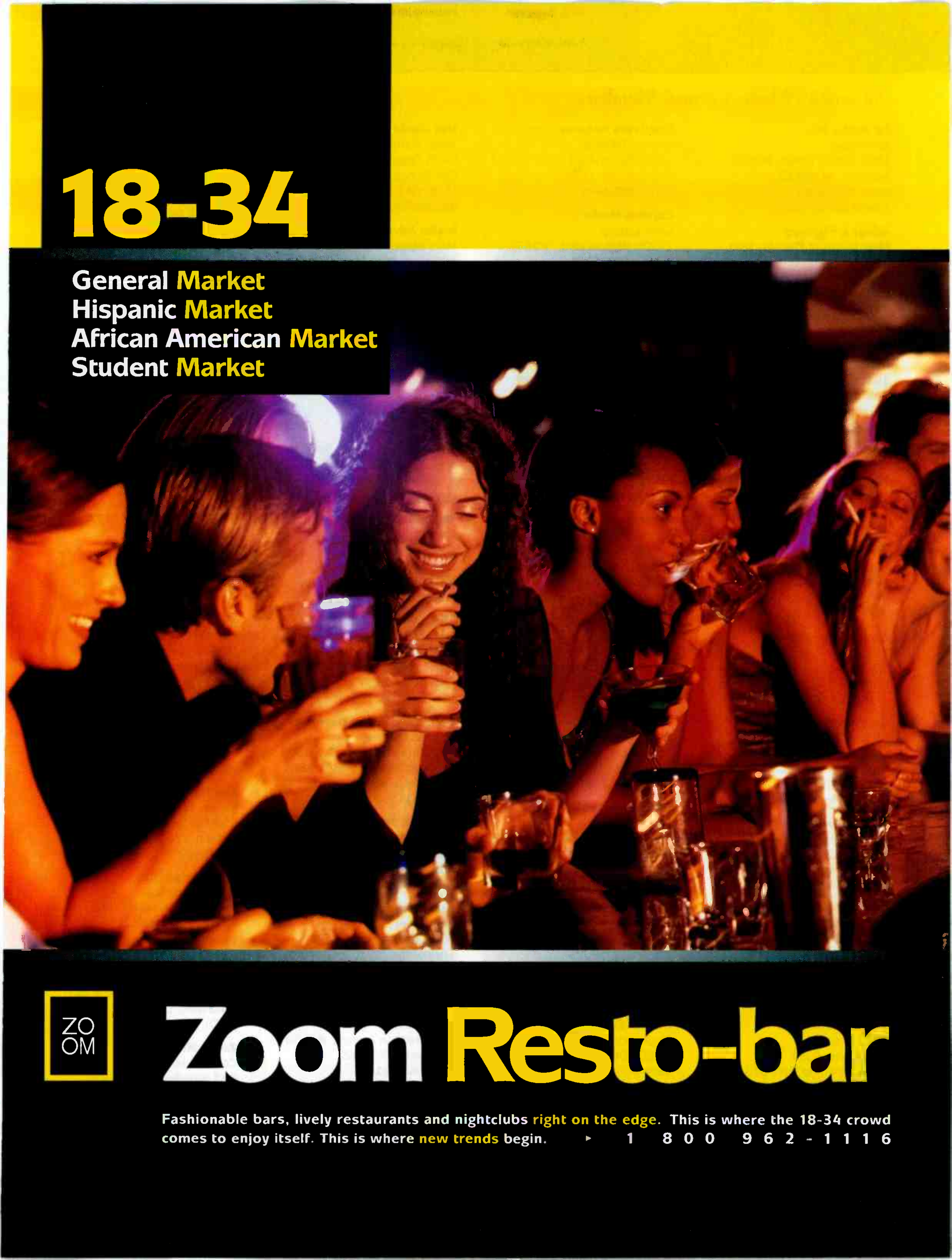
In 1900, a standardized billboard structure was first created, and ushered in a boom in national billboard campaigns. Confident that the same ad would fit billboards from Connecticut to Kansas, big advertisers like Palmolive, Kellogg and Coca-Cola began to mass produce billboards for a broader market.

The American highway billboard proliferated so rapidly that the Highway Beautification Act was signed into law by President Johnson in 1965. It controlled billboards on interstate and federal-aid primary highways by limiting billboards to commercial and industrial areas, and by requiring states to set size, lighting and spacing standards and requiring just compensation for removal of lawfully erected signs.

Digital technology continues to transform the industry today, and outdoor companies offer an increasingly creative and diverse selection of advertising formats. These include bus shelters, transit and kiosks, airport advertising, mall displays, taxi tops and many others.

Outdoor Advertising Today — A Powerhouse Medium

Outdoor advertising is increasingly appearing in more prominent positions in the media plans of the most recognizable advertisers in the world. Revenue for the year 2000 topped more than $5 billion. The outdoor audience is steadily growing, as people spend fewer hours at home with traditional media, and more time on the road and in their cars. It is also a medium that reaps the benefits of the increasing fragmentation of other media. Media choices are increasing, while overall amount of media usage is not. In 1999 advertisers spent $4.8 billion on outdoor media in the United States, or 2 percent of the advertising media pie. Outdoor advertising grows by nearly 10 percent a year, and its revenues have been growing steadily for 30 years, at a


18-34
General Market
Hispanic Market
African American Market
Student Market
ZO OM
Zoom Resto-bar
Fashionable bars, lively restaurants and nightclubs right on the edge. This is where the 18-34 crowd comes to enjoy itself. This is where new trends begin.
1 800 962-1116

Alternative Media Council Members:

Ad Walls, Inc.
John Rowe
1001 Bishop Street, #2820
Honolulu, HI 96813
(808) 526-4044
jrowe@adwalls.com

Adopt A Highway Maintenance Corporation
Kerri Guse
3151 Airway Ave., Suite F110
Costa Mesa, CA 92626
(800) 358-0231
info@adoptahighway.com

Ads On Phones
Mason Harris
12156 Parklawn Drive
Rockville, MD 20852
(301) 468-0385
mharris@adsonphones.com

Advent Advertising Corporation
William Apel
6636 Cedar, Unit C
Raytown, MO 64133
(816) 358-0180

AirSign, LLC
Harald Ibele
6211 Howey Bottoms Road
Indian Trail, NC 28079
(888) 645-3442

Alvern, Inc. (Fillboard)
Tony Muscarello
6970 Portwest, #100
Houston, TX 77024
(713) 354-1100

Ambient Planet
William Sancho
420 Lincoln Road, Suite 331
Miami Beach, FL 33139
(305) 674-3400
william@ambient-planet.com

Amusement Media Inc.
Erik Wensberg
P.O. Box 157
Center Strafford, NH 03815
(603) 664-7174

AT&T
Jim Agliata
900 Route 202/206 N,
Room 2A130T
Bedminister, NJ 7921
(908) 234-4722
jagliata@att.com

Beach'n Billboard
Eric Zemsky
180 Manor Road
East Rutherford, NJ 7073
(201) 729-9119
eric@beachnbillboard.com

Bumper 2 Bumper
Phillip J. Day
125 The Parkway, Suite 101
Greenville, SC 29615
phillip@bumper2bumpermedia.com

Captivate Network, Inc.
Michael DiFranza
133 Littleton Road
Westford, MA 1886
(978) 392-4441

Captive Media
Gene Lederer
17200 Ventura Blvd., #117
Encino, CA 91316
(818) 784-6690

Cass Communications, Inc.
Jim Bilello
1800 Sherman Avenue, Ste. 300
Evanston, IL 60201
(847) 733-3112
james.bilello@casscom.com

DHJ Media Inc.
Peter Karrlander
410 Park Avenue
15th Floor, Suite 1530
New York, NY 10022
(917) 210-8181
peter.karrlander@ibm.net

Emergency Advertising
Sandy Grossman
340 Westwood Court
Norwood, NJ 7648
(201) 750-0443
sandy@emergencyads.com

Entertainment Systems Tech.
Stephen Armstrong
17011 Beach Blvd. Suite 530
Huntington Beach, CA 92647
(714) 841-9100
armstrong@entsystech.com

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Richie Engler
3501 Del Prado Blvd. #211
Cape Coral, FL 33904
(941) 945-8690

FreeCar.com LLC
David Silver
11990 San Vicente Dr., Ste. 350
Los Angeles, CA 90049
(310) 566-4000

Futurcom, Inc.
Lennox Lewis
100 Metropark South, Suite 340
Laurence Harbor, NJ 8879
(732) 888-1250
lennox@futur-com.com

Get2net
Tammy Shriner
9707-A Easter Lane
Englewood, CO 80112
(303) 706-1470
tammy@get2net.com

Green Light Worldwide Media
William Marella
6 Greenleaf Woods, Suite 201
Portsmouth, NH 3801
(603) 427-1700
bmarella@greenlightww.com

Hot Liquid Media Inc.
Justin Fortune
3435 Cesar Chavez St., #206
San Francisco, CA 94110
(415) 641-3036
jfortune@hotliquidmedia.com

Insite Advertising, Inc.
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New York, NY 10018
(212) 391-9048
marc@insiteadvertising.com

Kaleidoscope
Steve Morra
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New York, NY 10010
(212) 779-6652

M@x Racks
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New York, NY 10018
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Cordova, TN 38018
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rswaney@media25.net

MetroImages, Inc.
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Oakton, VA 22124
(703) 629-2580
frankie@metroimages.com

Next Generation Network
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Minneapolis, MN 55344-3854
(952) 944-7944
tom@ngn.com

NuBoard Media
James Allegro
200 Colonial Home Dr., Ste. 412
Atlanta, GA 30309
(404) 605-7158

NuSign Industries, LLC
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Encino, CA 91316
(818) 708-2900
kfleer@nusign.com

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crfisher@parkplacemedia.com

ParkMedia LLC
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11500 W. Olympic Blvd., Ste. 611
Los Angeles, CA 90064
(310) 943-4500
jlevin@parkmedia.com

Promocup Inc.
Marc Friedman
599 11th Avenue
New York, NY 10036
(212) 265-5431

Pubbli A Usa, Inc.
Massimo Caruana
2243 Avenida De la Playa
La Jolla, CA 92037
(858) 459-3238

Shopper Displays LLC
John Wambold
701 Horsham Road, #205
Horsham, PA 19044
(215) 441-1205

Silver Screen Media, Ltd.
Barbara Miller
23550 Commerce Park Road #2
Cleveland, OH 44122
(216) 831-1990
silverscreen@stratos.net

Sweet Logo, Inc.
Jay L. Brownstein
870 W. 181st Street, #25
New York, NY 10033
(212) 927-6947
sweetlogoinc@aol.com

TAZ Media Group
Taz Anderson, Jr.
2931 Paces Ferry Road, #150
Atlanta, GA 30339
(770) 434-8104
taz@tazmediagroup.com

The AdBrite Corporation
Walter Straus
12 Young Road
Katonah, NY 10536
(914) 232-9186
wpstraus@adbrite.com

The Fruit Label Company
Irv Weinhaus
5530 Corbin Avenue, Suite 335
Tarzana, CA 91356
(818) 996-6736

Transvision, Inc.
Gregor Thompson
2839 Liberty Avenue, 2nd Fl.
Pittsburgh, PA 15222
(412) 201-5741

Vuetopia, Inc.
Michael Podd
2430 Vineyard Avenue, #100
Escondido, CA 92029
(760) 738-7701

Zoom Media Corp.
Carl Grenier
853 Broadway, Suite 1520
New York, NY 10003
(212) 685-7981
carl@zoom-media.com

pace generally faster than total advertising and faster than the GDP.

In 2000, a year that saw a great deal of tumult in the advertising industry, the numbers remained strong. According to the OAAA, the outdoor industry sustained a highly respectable 4.1 percent gain during the last quarter of 2000, with revenue topping $1.2 billion. Total year-end revenue reached $5.2 billion, or 8.3 percent higher than the previous year. The fact that the medium sustained growth in a roller coaster year is a testament to the value of outdoor. Budget-conscious agencies scaling back their overall ad spending looked to outdoor for the best value for their advertising dollar.

Andrea McDonald of McDonald Media, an ad agency specializing in out-of-home and non-traditional advertising, and chairperson of the New Advertiser Council of the OAAA, has been in the alternative advertising world for over 20 years. She offers marketers who are considering alternative media the following suggestion: Because alternative media is exactly that -- alternative -- the ability to measure viewings will be different from traditional media. Make sure that the agency that plans and places your media is able to do this for you. With the media universe expanding rapidly, there are now companies that can help measure results that are appropriate for every medium. •

Additional Resources:

For more information on alternative media in particular or outdoor advertising in general, here are a few resources:

Outdoor Advertising Association of America (OAAA)
1850 M Street N.W., Suite 1040, Washington, DC 20036
(202) 833-5566

Alternative Outdoor Media Council (a council of the OAAA)
Contact Diane Cimine, OAAA Executive Vice President of Marketing, at (212) 697-8075.

Advertising Research Foundation (ARF)
641 Lexington Avenue, 11th floor, New York, NY 10022
(212) 751-5656
The pre-eminent professional organization in the field of advertising research has a committee dedicated to addressing out of home media.

American Association of Advertising Agencies (AAAA)
405 Lexington Avenue, New York, NY 10174
(212) 682-2500
The national organization of advertising agencies, representing nearly 600 agencies has a committee that addresses out of home media.

Foundation for Outdoor Advertising Research and Education (FOARE)
1850 M Street N.W., Suite 1040, Washington, DC 20036
(202) 833-5566
A non-profit education fund administered by the OAAA to enhance and expand educational opportunities in the outdoor advertising industry.

Traffic Audit Bureau for Media Measurement (TAB)
420 Lexington Avenue, Suite 2520, New York, NY 10170
(212) 972-8075
The national circulation authority for outdoor media, providing advertisers with independent, authenticated audience measurement data.

oaaa
OUTDOOR ADVERTISING
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Movers

CABLE

Ad sales rep firm National Cable Communications added three new account executives to its regional sales offices. Former AT&T account executive **Gina Felix** has joined the Dallas office; **Dennis Taylor**, formerly with Telegration Inc., is on board in the Cleveland office; and **Bob Ware**, previously an account executive with Court TV, will serve in the Washington, D.C., office. Also, **Roseann Cardullo** was promoted to manager, sales promotions, in NCC's New York headquarters.

RADIO

Don Howe was promoted to senior vp of Clear Channel Radio's West Coast division, including California and Hawaii. Howe was most recently vp and market manager of Clear Channel's radio stations in Denver and North and South Dakota. He shared the role with **Lee Larsen**, who was named vp and market manager of the Denver cluster. Howe replaces Jim Donahue, who resigned shortly after the company reorganized early this month. In Florida, Orlando market manager **Linda Byrd** was named to the new post of regional vp, adding responsibilities for the Southeast region State News Network, owned by CC...Infinity Broadcasting announced several management changes along AM/FM lines for its Chicago radio stations. **Rod Zimmerman**, vp and general manager of WBBM-AM "Newsradio 780," added the same title at WSCR-AM 670 "The Score." **Drew Hayes** was promoted to operations director for WBBM and WSCR, from director of news and programming at WBBM. **Harvey Wells**, formerly vp and general manager of WSCR, WXRT-FM and WCKG-FM, continues as vp and general manager of the two FMs.

MAGAZINES

Jacqueline Blum, president of licensing sales and marketing for Emap USA before the company sold its magazines to Primedia, has been named president of Primedia Enterprises, the company's licensing arm...**Vince Bielski**, former features editor of defunct *Industry Standard*, has been named executive editor of *MBA Jungle*.

Media Elite

EDITED BY ANNE TORPEY-KEMPH

Casey at The Bat For WCBS

Sleepless in New York: WCBS' new hire

WHITNEY CASEY'S first official day on the job turned into a week on the job—without very much sleep.

The new reporter for CBS flagship WCBS-TV arrived at work early on Sept. 11 and learned of the World Trade Center terrorist attack from monitors in the station's lobby. "I just put my coffee down and ran into the newsroom," says the 26-year-old Casey, ex-wife of New York Giants cornerback Jason Sehorn. Immediately, she was sent into the field, where she stayed for much of the first week, reporting on the attack and its aftermath from several points around the city.

Since the attack, Casey has gotten extensive prime-time exposure among a handful of key on-air reporters for WCBS, one of very few stations to stay on the air after the Trade Center collapsed and took many antennas with it. WCBS' coverage was also picked up by CBS, giving Casey her network debut.

It's a long way from Miami, where Casey earned her stripes as a general assignment reporter at NBC O&O WTVJ, with mentoring from president/gm Don Browne, a former executive vp of NBC News. Before that, Casey worked as an anchor and reporter at WGXA, Gocom's Fox affiliate in Macon, Ga.

"I haven't had a day off yet," Casey said last Wednesday, adding, "I don't think I could sleep anyway...There are no words to describe that first day." *—Jeremy Murphy*

Spotlight On...

Stu Smiley Executive producer, *The Mind of the Married Man*

He isn't married, but that hasn't stopped Stu Smiley from tackling the hallowed institution on TV. Smiley, the executive producer of CBS' family-friendly, married-with-kids comedy *Everybody Loves Raymond*, is the same guy behind the new, racier, married-with-kids HBO series, *The Mind of the Married Man*. With the Sept. 23 launch of the comedy, Smiley faces not only the challenge of maintaining HBO's recent track record—*Sex and the City*, *The Sopranos* and *Six Feet Under*—but also the likely critical fire from spotlighting the carnal thoughts husbands have about women who aren't their wives. "Jim Belushi told me, 'If you do the show right, you have to get negative reviews,'" says Smiley, who founded the L.A.-based Comedy Arts Studio. "It seems like it's almost OK to have this conversation: What is the men's side of the story in relationships?"

Married, created by and starring Comedy Arts stand-up comedian/director/actor Mike Binder, follows Chicago columnist Mickey Barnes, who, though he adores his gorgeous and intelligent reporter wife, can't keep his mind off his assistant. "I think it's hard to address relationships with humor, but it most often succeeds at being funny when it's real," Smiley says. "I think Mike, in writing the pilot, hit the right tone and, hopefully, it will encourage people to talk." *—Megan Larson*

Introducing...

Placed-Based Media That's Right on Target

Sight & Sound™ is a new advertising medium that delivers your message directly to consumers in music stores, college book stores and movie theaters - **great venues for reaching elusive Gen Y consumers.**

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Sight Sound™

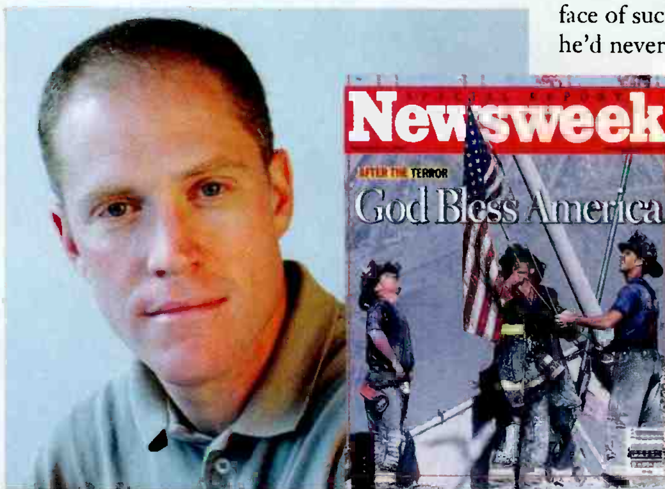
Franklin's Firemen: The Shot Seen 'Round the World

LIKE MOST OF US since Sept. 11, Thomas Franklin has had a hard time concentrating on his work. But for the veteran newspaper photographer, it's because he's suddenly in the public eye as the eye behind *the* image from the World Trade Center disaster. Franklin and his employer, *The Record* (Hackensack, N.J.), have been deluged with requests from people wanting a copy of his picture of firemen raising a flag at Ground Zero and from media requesting interviews.

"I'm pretty uncomfortable with [all the attention]," says Franklin, 36 and the father of a toddler. "I'm flattered, but it's made it almost impossible to get anything done."

For most of that fateful morning, Franklin had been shooting pictures at the makeshift triage center that had been set up at Jersey City's Exchange Place across the Hudson River from the Towers. When activity there slowed down at around 1 p.m., Franklin and a colleague talked their way onto a passing tugboat, which ferried them over to the World Financial Center, a short distance from the epicenter.

"There was virtually no color—everything was covered in white," recalls the New York–born photog, still shaken eight days after the attack. He wandered around near the wreckage, and as firemen evacuated Building 7 in anticipation of its eventual collapse, he saw three of them putting up a flag amid the rubble. "I did see the visual similarity with the Iwo Jima image [of American soldiers raising a U.S. flag during the critical World War II battle, by Joe Rosenthal], but mostly I saw the symbolism in it—the tremendous courage of these guys in the face of such destruction." Franklin says he'd never cried on the job before, but this was different: He was "keenly aware of how things forever would be changed by this," and he was concerned about his brother, who works in a building in the area of the Towers (but got out safely).



Behind the scene: *Record* staffer Franklin took the picture that's turning up on newsstands everywhere.

Franklin's inspiring picture was picked up by countless news organizations around the world within the first 48 hours of its release, before *The Record* hired a photo agency to handle requests.

What about the buzz circulating that his picture is a sure bet to win a Pulitzer? The humble Franklin would rather not discuss it. "You know, when a pitcher has a no-hitter going, you don't talk to him about it," he says. —*ATK*

Editor's note: To read Franklin's personal account of his experience on Sept. 11, and for information on obtaining a copy of the picture, go to www.groundzerospirit.com.

Media Dish

At Dodger Stadium in Los Angeles for a fund-raiser to aid the Red Cross Disaster Relief Fund, spearheaded by local AM radio stations KABC, KLOS, ESPN Radio1110 and Radio Disney and KABC-TV, KABC afternoon-drive host Larry Elder (c.) joined mid-morning team Gloria Allred and Mark Taylor.

The five Greater Media FM radio stations in Boston—WTKK, WROR, WKLB, WMJX and WBOS—came together at Beantown's Faneuil Hall to raise money for the September 11th Fund, organized by the United Way. (Pictured) WTKK afternoon hosts Margery Eagan and Jim Braude.

HOUSEHOLDS FOR SALE

LARGEST SELECTION

CHARMING FOUR MEMBER FAMILY available immediately. Mother and father earn 90k and 125k respectively. Boy, 20, in college into rap/rock and maintaining a fan website. Girl, 17, junior honors student in high school likes Nelly Furtado and Dave Matthews. And the high family income is to die for. Ready now.

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DISTINCTIVE FAMILY. Three people, each with their own unique character built right in. Dad's a local web page designer and Wall Street finance fanatic. Mom is a local banking executive who keeps up with Hollywood gossip in her downtime. Daughter babysits weekends and volunteers all summer long.

Inside Media

NEWS OF THE MARKET

WPAT Sends Amore From Empire State Bldg.

Spanish Broadcasting's WPAT-FM is back on the air after the first attack on the World Trade Center knocked out the station for 59 hours. With help from federal authorities, the station is now broadcasting from atop the Empire State Building. "You can imagine the security with a bunch of guys bringing in boxes and equipment," said Carey Davis, vp and general manager of WPAT. "But in some ways, our signal in the 50 miles around New York is better than before." Although FM stations benefited from the height of the WTC, the lead flooring used to protect the Windows on the World restaurant at the top of the Trade Center made the signal inferior, causing an exodus among most of the city's FM stations. Carey is now working on establishing a backup transmitter for both WPAT and sister station WSKQ-FM at 4 Times Square, where all five of Clear Channel's New York stations are also located.

A&E Nabs *Third Watch* Off-Net Rights

A&E Network has purchased exclusive off-network rights to the NBC drama *Third Watch*. The series, which spotlights the lives of New York City firefighters, police officers and paramedics working the 3-11 p.m. shift, will join the A&E lineup in fall 2002. Though technically not a replacement for *Law & Order*, which A&E airs at 7 p..m. and 11 p.m., *Third Watch* will fill the void when the long-running legal series is dropped from the channel's lineup in August 2002. It has not been determined when in the schedule *Third Watch* will run. The series is distributed by Warner Bros. Domestic Cable Distribution.

Fernandez to Co-Anchor *KTLA Morning*

Former *Access Hollywood* anchor Giselle Fernandez has been named co-anchor of the *KTLA Morning Show*, which airs weekdays on the Tribune-owned WB affiliate in Los Angeles. Fernandez, who got her start in broadcasting at KTLA as a weekend anchor and reporter, is scheduled to begin morning duty on Oct. 15. Fernandez replaces popular morning-news anchor Barbara Beck, who left the station amid some controversy last spring. Fernandez is currently co-anchor of the History Channel's *This Week in History*. She has also covered international news for NBC and CBS.

Sun-Sentinel Celebrates Hispanic Heritage

The South Florida *Sun-Sentinel*, the Tribune company's Fort Lauderdale, Fla.-based newspaper, will publish an extensive editorial section celebrating Hispanic Heritage Month in its Friday, Sept. 28, edition. "We have been exploring opportunities to better serve our growing Hispanic population," said Josie Bacallao, *Sun-Sentinel* vp of marketing, referring to results of the 2000 Census that show Broward County's Hispanic population has more than doubled

Her radio lovefest just scored its 60th affiliate, Dallas' KVIL-FM.

Love Lifts Delilah's Ratings

Delilah, the nighttime (7 p.m. to midnight) radio host known for mixing easy talk about relationships and love with weepy ballads, has been climbing the ratings ranks since she was first syndicated by Jones Radio Networks in 1996. She recently scored the No. 1 spot among women 25-54 in 60 of the 210 markets in which she airs, on stations including WLTE-FM in Minneapolis, WSHH-FM in Pittsburgh, WDOK-FM in Cleveland and WMGF-FM in Orlando. That tops Delilah's previous record of 54 No. 1 spots, achieved in the Fall 2000 Arbitron survey. Last week, Delilah welcomed her newest affiliate, KVIL-FM, Infinity Broadcasting's Adult Contemporary station in Dallas, giving the show clearance in three top-10 markets. This year also marked publication of her first book, *Love Someone Today: Encouragement and Inspiration for the Times of our Lives* (Fireside 2001).

Calendar

Mediabistro's next THINK{drinks} discussion, on **"The Pink Ghetto? Why women's magazines get no respect,"** will be held Oct. 3 at a yet-to-be-determined venue in New York. Featured participants will include Kathy Bishop, editor in chief, *Mode*, and John Godfrey, senior editor, *Glamour*. Contact: 212-929-2588.

The International Radio & Television Society Foundation will present **IRTS Newsmaker Luncheon: Network Entertainment Chiefs** Oct. 20 at the Waldorf-Astoria in New York. Panelists will include Fox's Gail Berman, ABC's Stuart Bloomberg, the WB's Jordan Levin, CBS' Nancy Tellum and NBC's Jeff Zucker. Contact: 212-867-6650.

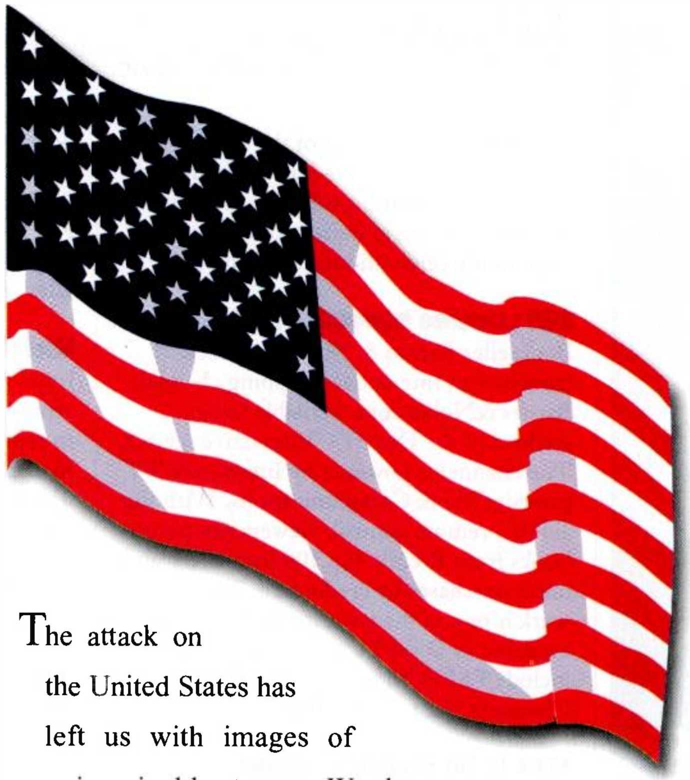
The **American Magazine Conference 2001**, the annual conference of the Magazine Publishers of America and the American Society of Magazine Editors, will be held Oct. 21-24 at the Arizona Biltmore Resort & Spa in Phoenix. This year's theme is "Brainstorming for the Next Media Boom." Contact: 212-872-3700.

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

YM magazine and Adweek Conferences will present a seminar entitled **"What Teens Want: Marketing to a New Generation Ages 12-18,"** Nov. 5-6 at the Hilton Universal Hotel in Los Angeles. Featured speakers will include Michael Wood, vp of Teenage Research Unlimited. Contact: 888-536-8536.

Magazine Publishers of America will present **Big Bang III, a seminar for magazine public relations professionals,** Nov. 12 at the MPA offices in New York. Contact: 212-872-3700.

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



Inside Media

since 1990. The content of the section will be produced by the *Sun-Sentinel*'s editorial staff and will feature a calendar of events and other news and information related to community celebrations in October.

B&N Launches Interactive TV Channal

Bookseller Barnes & Noble last week launched an interactive shopping channel, Barnes &Noble.com, available to subscribers of the DirecTV Interactive service. The channel is powered by Interactive TV provider Wink Communications. With the aid of a remote control, viewers can peruse books from B&N's Top 100 list on TV and make purchases by credit card. The network is one of the few interactive services available to DirecTV's customers. Others include ESPN Today and The Weather Channel's "Instant Weather."

KDKA to Get New Morning Host

John Cigna, the morning show host on Infinity Broadcasting's KDKA-AM, the No. 1 station in Pittsburgh, is hanging up his microphone at the end of this year. He'll be replaced by Larry Richert, the main weather anchor on KDKA-TV, Infinity's owned-and-operated CBS affiliate. Richert, who served as midday host on KDKA-AM between 1989 and 1992, has big shoes to fill. As the station's only long-term morning host, Cigna has been a morning staple in the market since 1983. In the Spring Arbitron survey, his ratings were huge, with a 15.5 overall audience share. "There's probably no way to describe what John means to KDKA and to the Pittsburgh community," said Michael Young, vp and general manager of KDKA. Cigna joined KDKA in 1973 as host of the 9 p.m-to-midnight talk show, where he often encouraged listeners to "Buy American." Over the years, Cigna became famous for his April Fool's Day pranks, such as the one convincing listeners to flush their toilets at the same time to rid the Pittsburgh sewer system of a giant alligator. Richert comes with his own claim to fame. When he was midday host on KDKA in 1992, he played the last "official" song aired on the station: Don McLean's "American Pie."

BMI Jump-Starts Minority Scholarships

BMI is picking up the bill for 25 minority students to attend the Radio Advertising Bureau's Sales Training Academy in 2002. Recipients will be selected by the organization's scholarship committee, which will announce the winners in February at the RAB's annual sales conference in Orlando, Fla. Since it was formed in December 1999, the academy has graduated nearly 600 radio sales executives.

MediaAmerica to Rep *Komando* Show

Jones MediaAmerica, the advertising sales arm of Jones Media Networks, has agreed to represent national sales for *The Kim Komando Show*, syndicated by WestStar TalkRadio Network. The three-hour weekly computer and Internet show hosted by Kim Komando airs live Saturdays at 10 a.m. on more than 400 radio stations, including WLS-AM in Chicago, WSB-AM in Atlanta, WIOD-AM in Miami and KFYI-AM in Phoenix. *The Kim Komando Computer Minute*, a weekday feature, airs on more than 200 radio stations, including WCBS-AM in New York.

Luxury Golf Revamped as Lifestyle Title

Following its sale of *Robb Report* and *Showcase* magazines to Curtco Media in July, Luxury Media Corp. has repositioned its remaining magazine, *Luxury Golf*, broadening it from a niche book to a luxury lifestyle title. As of its September/October issue, on stands now, the bimonthly has added coverage of fashion and jewelry, home decor, fine dining, automobiles, yachts and private aircrafts. The controlled-circulation magazine also underwent a subtle redesign that includes a new logo. In addition, there has been some change in editorial leadership as well as some staffers: *Luxury Golf* associate editor Ron Crowley has been promoted to executive editor, replacing James Bartlett, who has moved to Curtco to help with the transition of *Robb Report*.

Postal Service Eyes Third Rate Hike in '01

The U.S. Postal Service recently announced it will ask for another postal rate increase, the third in 21 months. The USPS Board of Governors is expected to file for an increase estimated at 8.7 percent across the board and 10 percent for periodicals early this week. The increase could take effect around Labor Day 2002. The magazine industry has been battling the hikes for the past year, saying the added costs could cripple many magazines. There have already been two increases this year, in January and July.

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 9/17/01

Artist/Group: Gorillaz
Song/Video: "Clint Eastwood"
Album: *Gorillaz*

Alter-egos of Damon Alburn from Blur (2-D) and cult-cartoonist Jamie Hewlett (Murdoc) make up Gorillaz. It seems to be a project for fun more than anything else - there's a lot of experimentation on the record, but mostly leans towards old skool hip-hop effects...

Artist/Group: Alicia Keys
Song/Video: "Fallin'"
Album: *Songs in a Minor*

Though only 19, Keys wrote most of the material on her record as well as playing piano - something the Britneys and Christinas can't quite pull off. Owes more of a debt to Stevie Wonder and Aretha Franklin than Janet & Madonna, and she does a killer cover of the Prince's "How Come U Don't Call"...

The Hollywood Reporter's Box Office

For weekend ending September 16, 2001

This Week	Last Week	Picture	3-Day Weekend Gross	Days in Release	Total Gross Sales
1	New	Hardball	9,386,342	3	9,386,342
2	New	The Glass House	5,738,448	3	5,738,448
3	1	The Muskateer	5,471,960	10	17,771,970
4	2	Two Can Play That Game	4,604,843	10	4,604,843
5	5	The Others	4,574,678	38	73,422,887
6	6	Rush Hour 2	4,092,375	45	211,149,100
7	3	Jeepers Creepers	3,844,246	17	29,665,575
8	7	American Pie 2	3,601,440	38	135,928,054
9	8	Rat Race	3,553,183	31	47,689,781
10	4	Rock Star	3,388,545	10	11,045,383

Culture Trends

MTV Top 20 U.S. Countdown

Week of 9/17/01

1. **Alien Ant Farm** "Smooth Criminal"
2. **Jennifer Lopez** "I'm Real"
3. **P. Diddy w/ Black Rob** "Bad Boy for Life"
4. **Alicia Keys** "Fallin'"
5. **Blu Cantrell** "Hit 'em Up Style"
6. **Jagged Edge** "Where's the Party At"
7. **Limp Bizkit** "Boiler"
8. **Sum 41** "Fat Lip"
9. **Usher** "You Remind Me"
10. **Michelle Branch** "Everywhere"

The Billboard 200

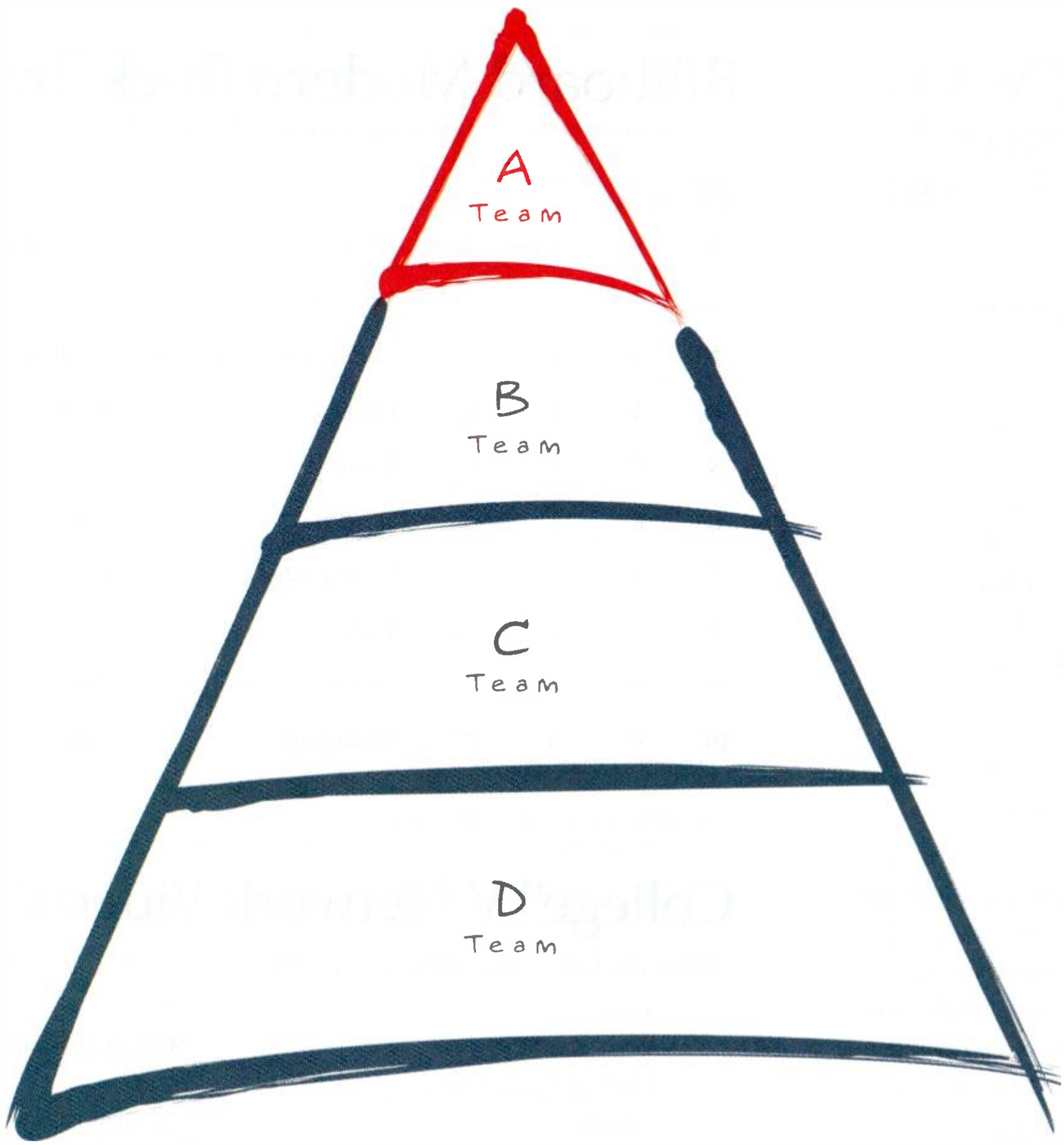
The top-selling albums compiled from a national sample of retail store sales.

This Week	Last Week	Weeks on Chart	Artist	Album
1	-	1	Jay-Z	The Blueprint
2	-	1	Nickelback	Silver Side Up
3	2	12	Alicia Keys	Songs in a Minor
4	-	1	Fabolous	Ghetto Fabolous
5	-	1	Bob Dylan	Love and Theft
6	-	1	P.O.D.	Satellite
7	-	1	Mariah Carey	Glitter
8	7	47	Linkin Park	Hybrid Theory
9	4	7	Various	Now 7
10	3	9	Aaliyah	Aaliyah

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.	Weeks on Chart	Title	Artist
1	2	1	16	Fallin'	Alicia Keys
2	1	1	13	I'm Real	Jennifer Lopez
3	3	3	18	Where The Party At	Jagged Edge w/Nelly
4	4	2	22	Hit 'em Up Style	Blu Cantrell
5	6	1	16	You Remind Me	Usher
6	7	6	25	It's Been Awhile	Staind
7	5	3	15	Someone to Call My Lover	Janet Jackson
8	9	8	10	Family Affair	Mary J. Blige
9	8	2	23	Let Me Blow Ya Mind	Eve w/Gwen Stefani
10	13	10	10	Izzo (H.O.V.A.)	Jay-Z


A
Team
B
Team
C
Team
D
Team

Culture Trends

MTV #1s Around the World

Week of 9/17/01

Australia
Christina Aguilera/Mya/Lil Kim/Pink "Lady Marmalade"

Brazil
Westlife "Uptown Girl"

Germany
Atomic Kitten "Whole Again"

India
Asha Bhosle/Adnan Sami "Barsaat"

Indonesia
Jamrud "Surti Tejo"

Italy
Chao Manu "Me Gustas Tu"

Japan
Misia "Rhythm Reflection"

Latin America - Mexico
Backstreet Boys "The Call"

Latin America - Chile
Madonna "What It Feels Like..."

Latin America - Argentina
Catupecu Machu "Eso Vive"

Philippines
Destiny's Child "Survivor"

Poland
Bon Jovi "One Wild Night"

Russia
Delicate "Careless"

Southeast Asia
Robbie Williams "Let Me Be Your Energy"

Taiwan
Elva Hsian "Tomorrow"

U.K.
Crazy Town "Butterfly"

Billboard Modern Rock Tracks

Compiled from a national sample of airplay provided by Broadcast Data Systems.

This Week	Last Week	Peak Pos.	Weeks on Chart	Title	Artist
1	1	1	9	How You Remind Me	Nickelback
2	2	1	17	Smooth Criminal	Alien Ant Farm
3	3	3	6	I Wish You Were Here	Incubus
4	4	1	23	Fat Lip	Sum 41
5	7	5	13	Control	Puddle of Mudd
6	6	2	20	Schism	Tool
7	5	3	13	Clint Eastwood	Gorillaz
8	13	8	5	Fade	Staind
9	8	8	15	Down With the Sickness	Disturbed
10	9	5	27	Crawling	Linkin Park

CollegeTV Network Video Playlist

Submitted by College Television Network for week ending September 16, 2001

Artist	Title
Cake	Short Skirt/Long Jacket
Cold w/ Aaron Lewis	Bleed
Default	Wasting My Time
Depeche Mode	I Feel Loved
Dido	Hunter
Jamiroquai	Little L
Jennifer Lopez w/ Ja Rule	I'm Real (remix)
Lil' Bow Wow	Hardball
Little T & One Track Mike	Shaniqua
Long Beach Dub AllStars	Sunny Hours
New Order	Crystal
Nickelback	How You Remind Me
PS 2000	It's Gonna Be Alright
Rollins Band	Your Numbers One
Tinstar	Sunshine
The Start	Gorgeous

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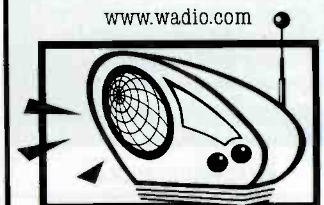

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A Division of Cadbury Schweppes, plc

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Magazines

EDITED BY LISA GRANATSTEIN

Coming to Terms

Publishers face a difficult road ahead as some advertisers, reeling from the attacks, pull pages

BRUCE WODDER

McCarrick (left) and his sales team at *Time* will offer research to buyers like Carat's Verklin on consumer attitudes following the attacks.

IN THE WAKE OF THIS MONTH'S TRAGIC EVENTS, MEDIA BUYERS REFLECTING ON THE country's somber mood are putting several campaigns on hold and are altering many others. What was once considered a media recession, due to dot-com fallout and Wall Street volatility, is now veering into uncharted waters. The deep impact on the nation's psyche, as well as the uncertainty of events to come, has the potential to dwarf the aftermath experienced by publishers following the Gulf War. In 1991, overall ad spending fell 3 percent, to $6.5 billion, according to CMR, during the recession that year.

Monthly publishers, who have large lead times, say that December may be adversely affected and '02's first quarter is now up in the air. Weekly publishers, who had hopes of regaining some lost momentum, now say the fourth quarter will be a washout. "You will see an enormous number of advertisers stand at the sidelines for the next three to four weeks," predicts David Verklin, CEO of Carat North America. "There is just no way that the recent events can do anything good for the advertising business."

"The Gulf War seemed likely to have a beginning and end," says Gene DeWitt, chairman/CEO of Optimedia International. "And in this case, no one knows what to expect. Uncertainty usually means paralysis, and that's kind of what we have."

Top magazine ad categories that are prone to volatility include automotive, financial services and travel. Through June, automotive ads, which comprise 9.9 percent of total magazine spending, slipped 3.1 percent over the prior year; financial ads, which make up 4.7 percent of magazine spending, fell 15.7 percent; travel ads, which make up 5.1 percent of spending, actually rose 7.1 percent, according to CMR.

So far, all facets of travel, including American Airlines, as well as financial services, including Merrill Lynch, Charles Schwab and Fidelity, have been hit hard. On the automotive front, Ford is proceeding cautiously and will stay out of print for the next few weeks; General Motors will forge ahead. DaimlerChrysler will also continue to advertise, but its Jeep Liberty ad that had included the Twin Towers in Time Inc.'s *People en Español*, and *Latina*, published by Latina Media Ventures, will in November feature the Statue of Liberty instead, according to James Kenyon, a Chrysler representative.

Other advertisers, such as Kraft Foods, suspended some print ads in which the content was not appropriate. Some luxury advertisers, however, are beginning to cut back or pull out. Tag Heuer watches and Prada pulled all of its ads, and Ralph Lauren opted to suspend all of its retail ads for the next two weeks; those few that remain will have new creative honoring the victims and rescuers, notes Ross Klein, senior vp, corporate marketing, for Polo Jeans Co.

One media buyer, who requested anonymity, worries that ads expressing condolences now cropping up in scores of newspapers (which are headed into magazines) may soon start to wear thin with readers. "Those ads are starting to sound like a company is taking advantage of the situation, even though they don't mean to," the buyer explains. "Here are people trying to do good, but it may come across as opportunistic. So what do you counsel your clients to do?"

There is also the fear among a number of

Mediaweek Magazine Monitor

BIWEEKLIES October 23, 2001

Biweeklies continue to feel the economic crunch, having slipped 31.42 percent year-to-date. Business magazines have struggled with the slowdown in dot-com and financial spending. Elsewhere, *Rolling Stone* and *ESPN The Magazine* are suffering from cutbacks in tobacco advertising. —*Lori Lefevre*

	ISSUE DATE	CURRENT PAGES	ISSUE DATE LAST YEAR	PAGES LAST YEAR	PERCENT CHANGE	YTD PAGES	YTD LAST YEAR	PERCENT CHANGE
BUSINESS/ENTERTAINMENT								
ESPN The Magazine	1-Oct	50.49	2-Oct	41.59	21.40%	986.60	1,144.51	-13.80%
Forbes	1-Oct	84.10	2-Oct	137.98	-39.05%			
Forbes ASAP	N.A.	N.A.	2-Oct	139.85	-100.00%			
Forbes (total)	1-Oct	84.10	2-Oct	277.83	-69.73%	2,793.44	4,302.00	-35.07%
Fortune	1-Oct	110.24	2-Oct	191.61	-42.47%	2,971.20	4,587.33	-35.23%
Inc.F	NO ISSUE					699.50	1,212.53	-42.31%
National Review	15-Oct	23.16	23-Oct	35.83	-35.36%	378.34	424.91	-10.96%
Rolling Stone	11-Oct	64.88	10-Oct	91.61	-29.18%	1,128.82	1,390.78	-18.84%
CATEGORY TOTAL		416.97		916.30	-54.49%	8,957.90	13,062.06	-31.42%

F=18 issues per year

Magazines

publishers that some advertisers—already hurt by the softening economy—may use the events as an excuse to pull pages to improve their bottom lines.

"The majority of our clients are running schedules as planned, but they're monitoring the situation closely. There are no widespread cancelations," says Verklin, whose clients include Pfizer and Adidas. "But everything will be down. You have to start with this premise and work down."

While the newsweeklies will feel the brunt early on, the first monthly issues to be affected will be December and January. With November pretty much closed, there will be few opportunities for advertisers to pull out. "We've not been affected that greatly to date," says Lou Cona, publisher of *Vanity Fair*. "But I don't believe we've seen the full impact of the past week." The November issue of *Vanity Fair*, on stands Oct.16, will include a 48-page ad-free onsert honoring the heroes. "It's time now more than ever to take a stronger stance and become stronger, not weaker," says Alyce Alston, vp/publisher of Fairchild Publications' *W*. "But we do see some people pulling out of our November and December.".

The big irony now facing newsweeklies—*Time*, *Newsweek* and *U.S. News & World Report*—is that just as the current issues are flying off the newsstands (*Time* last week printed an additional 500,000 copies after selling out its 3.5 million run), many advertisers are bowing out. "Newsweeklies are going to suffer most," says Alan Jurmain, executive vp/director of U.S. media services for Lowe Lintas & Partners, whose clients include UPS and Mass Mutual. "We know what they're going to have between their covers for the coming weeks and it isn't pretty. The sensitivity towards editorial is so much greater. We need to wait for that equilibrium to re-establish itself."

Simply put, the newsweeklies are in a tough spot. "Short term, it's had a significant impact," says William Holiber, publisher of *U.S. News*, who banks heavily on financial and travel ads. "We've had a lot of advertisers pull indefinitely. I don't think we'll get back a lot of business that we are expecting, but [some ads] will start trickling through."

Over at *Time*, a "considerable number" of ads were pulled from the Sept. 24 issue. *Time* publisher Ed McCarrick met with his sales and marketing team on Sept. 18 to map out a strategy, which includes discerning consumer reaction and marketplace trends for its advertisers. "I have always viewed us as media consultants, in terms of how we help

BIMONTHLIES September/October 2001

World Publications, based in Winter Park, Fla., has struggled this year to attract advertisers to both *Garden Design* and *Saveur*, which have fallen 21.21 and 23.63 percent to date respectively. World CEO Terry Snow attributes the difficulty not only to the tightening economy, but also to the fact that he is just now beginning to create sales and marketing programs after owning the titles for two years. —LL

	RATE BASE (1ST HALF '01)	CIRC. (1ST HALF '01)	CURRENT PAGES	PAGES LAST YR.	% CHANGE	YEAR TO DATE	YTD LAST YEAR	% CHANGE
American Heritage[8]	340,000[Q]	341,334	16.17	35.83	-54.87%	161.30	349.33	-53.83%
American Photo	250,000	252,522	42.36	57.72	-26.61%	252.62	257.56	-1.92%
Arthur Frommer's Budget Travel	350,000	417,869[B]	78.65	46.71	68.39%	331.25	253.24	30.80%
Audubon	450,000	460,328	62.24	68.41	-9.03%	312.42	346.55	-9.85%
Bride's	None	451,096	444.09	543.80	-18.34%	3,408.03	3,656.89	-6.81%
Coastal Living	450,000	473,253	121.42	123.68	-1.83%	539.65	496.03	8.79%
Country Home[8/O]	1,000,000	1,015,398	103.62	92.75	11.72%	642.97	683.76	-5.97%
Country Living Gardener	475,000	534,549	28.21	30.38	-7.14%	140.15	165.20	-15.16%
Custom Classic Trucks	105,000	N.A.[C]	DID NOT REPORT*			215.09	214.85	0.11%
Departures[7/O]	425,000	530,610[B]	172.33	196.09	-12.12%	804.01	875.80	-8.20%
Elle Decor[7]	450,000	456,722	193.45	207.45	-6.75%	852.50	878.37	-2.95%
Garden Design[8]	425,000	429,093	42.33	49.885	-15.14%	239.64	304.15	-21.21%
Golf for Women	378,000	380,120	91.43	75.36	21.32%	368.13	375.12	-1.86%
Healthy Kids	1,550,000	1 554,830[B]	38.46	47.33	-18.74%	177.21	166.34	6.53%
Islands[8]	220,000	234,143[X]	99.74	98.32	1.44%	544.56	504.37	7.97%
Kit Car	50,000	N.A.[C]	DID NOT REPORT*			71.75	79.66	-9.93%
Metropolitan Home	600,000	607,345	152.74	162.48	-5.99%	600.79	599.19	0.27%
Midwest Living	815,000	815,325	123.37	112.35	9.81%	560.42	586.96	-4.52%
Modern Bride	None	406,183	571.73	615.61	-7.13%	2,387.00	2,396.06	-0.38%
Modern Maturity	17,900,000[Q]	18,947,553	48.30	59.84	-19.28%	239.48	261.77	-8.52%
Mother Jones	160,000	181,774	33.00	38.00	-13.16%	172.08	165.10	4.23%
Motorcycle Cruiser	55,000	N.A.[C]	DID NOT REPORT*			194.53	186.17	4.49%
Muscle Car Review	55,000	N.A.[C]	DID NOT REPORT*			239.53	254.66	-5.94%
My Generation[L]	3,400,000	N.A.[C]	46.42	N.A.	N.A.	187.06	N.A.	N.A.
National Geographic Adventure	350,000	360,847	70.50	90.00	-21.67%	345.00	338.00	2.07%
National Geographic Traveler[8]	715,000	738,942	70.47	78.31	-10.01%	410.08	489.97	-16.31%
New Choices	600,000	609,155	49.92	47.18	5.81%	305.89	342.93	-10.80%
OG[G]	600,000	608,025	15.55	30.02	-48.20%	167.64	159.65	5.00%
Old House Journal	140,000	147,988[X]	67.20	88.40	-23.98%	291.50	334.94	-12.97%
Petersen's Rifle Shooter	50,000	N.A.[C]	DID NOT REPORT*			74.33	69.87	6.38%
Powder[7]	60,000	N.A.[C]	DID NOT REPORT*			87.52	127.26	-31.23%
Saveur[8]	375,000	391,373	35.99	63.66	-43.46%	209.14	273.85	-23.63%
Showboats International	50,000	51,698[B]	288.00	196.50	46.56%	850.00	734.20	15.77%
Ski[8/O]	450,000	454,248	236.91	206.71	14.61%	627.45	598.71	4.80%
Skiing[7/O]	400,000	404,024	148.42	133.56	11.13%	430.20	453.04	-5.04%
Slam[9]	None	221,914	DID NOT REPORT*			373.06	317.93	17.34%
Snowboarder[8]	121,800	N.A.[C]	DID NOT REPORT*			379.98	377.13	0.76%
Southern Accents	375,000	410,636	156.91	178.31	-12.00%	567.79	587.83	-3.41%
Sport Rider	90,000	101,069	DID NOT REPORT*			273.70	237.18	15.40%
Traditional Home	800,000	836,797	150.09	165.23	-9.16%	573.28	681.09	-15.83%
T&L Golf	400,000	406,069	107.55	117.2	-8.23%	465.06	434.25	7.09%
Veranda	335,000	380,890	145.26	159.32	-8.83%	612.77	609.47	0.54%
Category Total			**4,052.83**	**4,216.39**	**-3.88%**	**20,686.56**	**21,224.37**	**-2.53%**

*=Primedia was not prepared to report the titles it had acquired recently from Emap

Footnotes: rate base and circulation figures according to the Audit Bureau of Circulations for the first half of 2001; except, B=audited by BPA International; C=non-audited title; X=did not file a press time; Q=raised rate base during period; 7=seven issues per year; 8=eight issues per year; 9=nine issues per year; L=Launched in March 2001; O=October issue; G=Organic Gardening renamed

WEEKLIES September 17, 2001

	ISSUE DATE	CURRENT PAGES	ISSUE DATE LAST YEAR	PAGES LAST YEAR	PERCENT CHANGE	YTD PAGES	YTD LAST YEAR	PERCENT CHANGE
NEWS/BUSINESS								
BusinessWeek	17-Sep	75.37	18-Sep	172.64	-56.34%	2,685.60	4,154.50	-35.36%
The Economist	8-Sep	64.00	9-Sep	74.00	-13.51%	1,865.00	2,128.50	-12.38%
Newsweek[E]	17-Sep	45.58	18-Sep	62.19	-26.71%	1,168.74	1,570.25	-25.57%
The New Republic	17-Sep	13.83	18-Sep	10.72	29.01%	311.79	301.95	3.26%
Time[E/@]	17-Sep	70.89	18-Sep	53.15	33.37%	1,638.55	1,946.02	-15.80%
US News & World Report	17-Sep	84.37	18-Sep	61.72	36.70%	985.18	1,266.63	-22.22%
The Weekly Standard	24-Sep	10.80	25-Sep	10.60	1.89%	338.50	336.10	0.71%
Category Total		**364.84**		**445.02**	**-18.02%**	**8,993.36**	**11,703.95**	**-23.16%**
SPORTS/ENTERTAINMENT/LEISURE								
AutoWeek	17-Sep	20.91	18-Sep	23.38	-10.56%	1,024.59	1,093.78	-6.33%
Entertainment Weekly	14-Sep	41.93	15-Sep	29.79	40.75%	1,195.02	1,328.93	-10.08%
Golf World	14-Sep	12.00	15-Sep	17.75	-32.39%	913.01	1,158.22	-21.17%
New York[1]	17-Sep	32.50	18-Sep	45.80	-29.04%	1,899.80	1,824.20	4.14%
People	17-Sep	103.50	18-Sep	104.12	-0.60%	2,530.34	2,817.53	-10.19%
The Sporting News	17-Sep	4.30	18-Sep	10.00	-57.00%	352.40	456.20	-22.75%
Sports Illustrated	17-Sep	51.33	18-Sep	71.79	-28.50%	1,660.05	1,971.50	-15.80%
The New Yorker	17-Sep	103.46	18-Sep	97.80	5.79%	1,473.15	1,531.07	-3.78%
Time Out New York	12-Sep	65.88	13-Sep	97.13	-32.18%	2,433.31	2,623.50	-7.25%
TV Guide[X]	15-Sep	108.39	16-Sep	54.55	98.70%	1,939.96	2,192.34	-11.51%
US Weekly[6]	17-Sep	34.83	18-Sep	20.50	69.90%	677.19	666.29	1.64%
Category Total		**579.03**		**572.61**	**1.12%**	**16,098.82**	**17,663.56**	**-8.86%**
SUNDAY MAGAZINES								
Parade[X]	16-Sep	15.83	17-Sep	19.88	-20.37%	411.92	436.30	-5.59%
USA Weekend[X]	16-Sep	10.38	17-Sep	13.01	-20.22%	403.24	408.03	-1.17%
Category Total		**26.21**		**32.89**	**-20.31%**	**815.16**	**844.33**	**-3.45%**
TOTALS		**970.07**		**1,050.52**	**-7.66%**	**25,907.34**	**30,211.84**	**-14.25%**

E=estimated page counts; 1=one more issue in 2001; 6=six more issues in 2001; @=one fewer issue in 2001

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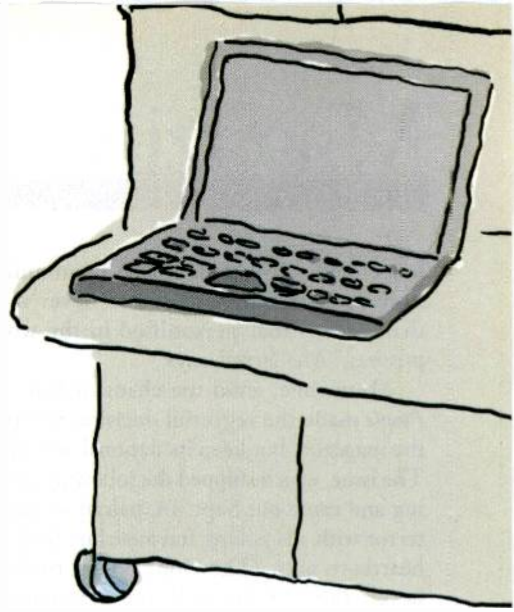

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our clients solve their media communications and strategy issues, and never more than now is that personified in the whole process," McCarrick says.

Meanwhile, amid the chaos of Sept. 11, *People* made the regretful decision to rip up the magazine but keep its national ads intact. The issue, which shipped the following morning and came out Sept. 14, paired images of terror with ads poking fun at airline food and heartburn pills. "The God's honest truth is I never thought to pull the advertising," explains Nora McAniff, president of the People Group. "We were in shock. No one thought of that. I was getting people out of the [Time & Life] building."

Advertisers this week will have the option of staying in or pulling out. *People*, which this week focuses on the heroes, will again increase its newsstand draw by 2 million; the weekly will carry about 28 ad pages. "We've talked to a majority of the [advertisers], and it's definitely going to take some time for this to pass," says Peter Bauer, *People's* publisher. The majority of ads in the Oct.1 issue are touting TV premieres; there are no automotive ads, and only a handful of packaged-goods ads. "We didn't necessarily make a decision we were happy about, but we had to make a decision, and that's what we did, and that's where we are," adds Bauer. *—Lisa Granatstein*

Grounded

Travel titles expect 4Q slump

While newsweeklies and business publications were the first to take a hit in ad spending following the terrorist attacks, travel titles are now also bracing for a short-term falloff. "It will be a very, very soft fourth quarter, exacerbated by this terrible tragedy," acknowledges Lisa Hughes, *Condé Nast Traveler* vp/publisher. "No question."

The pending cuts come as luxury travel titles already face a deficit of advertising. Through October, American Express Publishing's *Travel + Leisure* fell 2.1 percent, to 1,464 pages, and *Traveler* dipped 7 percent, to 1, 229, reports the *Mediaweek* Monitor.

With airlines laying off thousands and skittish tourists canceling trips, media buyers are rethinking late fourth-quarter plans. As a result, hotel chains are reconsidering their plans, and a slew of airlines have pulled their ads. "We've suspended advertising until further notice," says Mike McHale, group media director at Optimedia International, which

MONTHLIES October

***The Source*, down 5.58 percent to 1,271.31 pages through October, has seen a host of its small record-label ads bail this year due to the magazine's decision to increase its ad rates. "The smaller companies have really balked at our higher prices," notes associate publisher Peter Ferraro. Also, consolidation in the record industry has resulted in fewer record releases this year, which in turn has led to fewer ads. Elsewhere in the entertainment segment, *Movieline* is up 4.35 percent, but fourth quarter could prove rocky due to the terrorist attacks. The Walt Disney Co. pulled the theatrical release of *Bad Company*, and other studios may follow suit with their films, says *Movieline* publisher Audrey Arnold. —LL**

	RATE BASE (1ST HALF '01)	CIRC. 1ST HALF '01)	CURRENT PAGES	PAGES LAST YR.	% CHANGE	YEAR TO DATE	YTD LAST YEAR	% CHANGE
BUSINESS/TECH/NEW ECONOMY								
Entrepreneur	540,000	555,831	106.84	134.77	-20.72%	1,130.06	1,460.24	-22.61%
Fast Company	680,000	683,499	79.64	201.47	-60.47%	817.33	1,725.08	-52.62%
Fortune Small Business	1,000,000	N.A.[C]	58.13	62.57	-7.10%	403.89	442.43	-8.71%
Technology Review	250,000[Q]	261,150[X]	26.49	59.50	-55.48%	275.07	263.91	4.23%
Upside[10]	250,000	308,035[B]	43.50	115.00	-62.17%	436.50	1,337.00	-67.35%
Wired	500,000	506,395	111.35	191.84	-41.96%	1,033.76	1,832.96	-43.60%
Category Total			**319.11**	**630.38**	**-49.38%**	**2,966.58**	**5,601.38**	**-47.04%**
ENTERTAINMENT								
Movieline[11]	300,000	307,863	32.08	31.15	2.99%	298.13	285.69	4.35%
Premiere[@]	600,000	607,819	41.60	37.00	12.43%	357.21	453.39	-21.21%
The Source	460,000	465,225	130.50	157.21	-16.99%	1,271.31	1,346.51	-5.58%
Spin	525,000	548,846	80.22	108.83	-26.29%	779.85	937.99	-16.86%
Vibe[10]	775,000	777,218	105.80	114.52	-7.61%	972.77	933.74	4.18%
Yahoo! Internet Life	1,100,000	1,102,801	57.35	89.36	-35.82%	593.53	901.79	-34.18%
Category Total			**447.56**	**538.07**	**-16.82%**	**4,479.35**	**5,047.77**	**-11.26%**
ENTHUSIAST								
Automobile	625,000	633,972	61.33	89.28	-31.31%	605.62	756.07	-19.90%
Backpacker[9]	285,000	285,570	46.34	63.85	-27.42%	515.85	591.84	-12.84%
Bicycling[11]	278,000	286,861	35.68	45.38	-21.38%	404.98	502.44	-19.40%
Bike[10]	165,000	174,064		DID NOT REPORT*		326.95	432.46	-24.40%
Boating	None	200,152	126.96	131.83	-3.69%	1,267.44	1,268.36	-0.07%
Car and Driver	1,350,000	1,365,195	105.16	113.83	-7.62%	929.37	1,011.45	-8.12%
Car Craft	350,000	353,413		DID NOT REPORT*		380.21	487.44	-22.00%
Chevy High Performance	200,000	228,232		DID NOT REPORT*		656.88	706.41	-7.01%
Circle Track	120,000	126,503		DID NOT REPORT*		611.85	707.36	-13.50%
Cruising World	155,000	159,224	165.92	167.78	-1.11%	1,156.57	1,144.41	1.06%
Cycle World	310,000	319,489	89.79	78.79	13.96%	964.00	889.14	8.42%
Dirt Rider	180,000	205,445		DID NOT REPORT*		1,050.73	901.46	16.56%
Flying	None	308,086	94.00	124.21	-24.32%	783.54	836.80	-6.36%
Four Wheel & Off Road	425,000	444,087		DID NOT REPORT*		759.35	818.23	-7.20%
Golf Digest	1,550,000	1,559,322	113.39	121.39	-6.59%	1,111.38	1,261.96	-11.93%
Golf Magazine	1,400,000	1,400,140	94.13	78.75	19.53%	1,120.04	1,270.77	-11.86%
Hot Rod	725,000	733,485		DID NOT REPORT*		616.08	634.86	-2.96%
Motor Boating	None	125,505	106.76	158.52	-32.65%	1,139.51	1,419.38	-19.72%
Motorcyclist	240,000	258,174		DID NOT REPORT*		581.94	609.67	-4.55%
Motor Trend	1,250,000	1,253,214		DID NOT REPORT*		626.91	375.89	66.78%
Petersen's Photographic	200,000	203,257		DID NOT REPORT*		1,689.59	1,859.73	-9.15%
Popular Mechanics	1,200,000	1,239,737	66.98	79.34	-15.58%	563.80	679.32	-17.01%
Popular Photography	450,000	453,944	146.92	188.45	-22.04%	1,689.59	1,859.73	-9.15%
Power & Motoryacht	None	157,039[B]	238.92	226.26	5.60%	2,153.58	1,935.17	11.29%
Road & Track	750,000	772,848	104.14	104.11	0.03%	938.39	966.81	-2.94%
Rod & Custom	150,000	174,498		DID NOT REPORT*		844.65	823.61	2.55%
Sailing World[10]	55,000	57,217	62.74	50.98	23.07%	372.37	362.59	2.70%
Salt Water Sportsman	160,000	163,369		DID NOT REPORT*		862.02	800.36	7.70%
Skin Diver	200,000	200,916		DID NOT REPORT*		535.32	610.23	-12.28%
Sport Truck	175,000	177,315		DID NOT REPORT*		908.24	729.49	24.50%
Stereo Review's Sound & Vision[1E]	450,000	454,615	77.16	98.00	-21.27%	578.27	644.99	-10.34%
Tennis[10]	700,000	702,877	48.00	36.16	32.74%	488.21	504.30	-3.19%
Yachting	132,000	135,406	219.00	222.80	-1.71%	1,776.61	1,763.27	0.76%
Category Total			**2,003.35**	**2,179.71**	**-8.09%**	**29,009.83**	**30,165.99**	**-3.83%**
FASHION/BEAUTY								
Allure	850,000	943,829	152.00	176.25	-13.76%	975.38	989.46	-1.42%
Cosmopolitan	2,600,000	2,642,886	198.50	196.77	0.88%	1,658.48	1,747.29	-5.08%
Elle	950,000	962,230	211.81	268.46	-21.10%	1,618.71	1,776.05	-8.86%
Essence	1,050,000	1,050,652	104.68	104.70	-0.02%	948.29	923.57	2.68%
Glamour	2,100,000	2,139,672	152.47	228.05	-33.14%	1,302.77	1,556.90	-16.32%
Harper's Bazaar	700,000	723,302	157.56	222.32	-29.13%	1,368.18	1,474.22	-7.19%
In Style	1,400,000	1,634,320	316.39	360.00	-12.11%	2,310.71	2,466.00	-6.30%
Jane[10]	600,000	630,455	102.52	99.95	2.57%	712.12	643.46	10.67%
Lucky[P]	500,000	N.A.[C]	81.71	N.A.	N.A.	532.66	N.A.	N.A.
Mademoiselle	1,100,000	1,153,438	73.11	96.36	-24.13%	651.84	796.17	-18.13%
Marie Claire	775,000	910,602	200.32	225.04	-10.98%	1,308.41	1,343.68	-2.62%
Vogue	1,100,000	1,104,876	347.88	326.24	6.63%	2,555.98	2,556.63	-0.03%
W	425,000	442,358	251.11	261.76	-4.07%	1,725.10	1,701.50	1.39%
Category Total			**2,350.06**	**2,565.90**	**-8.41%**	**17,668.63**	**17,974.93**	**-1.70%**
FOOD/EPICUREAN								
Bon Appétit	1,200,000	1,283,375	138.99	126.39	9.97%	973.39	1,052.97	-7.56%
Cooking Light[11]	1,450,000	1,502,670	140.12	116.21	20.57%	985.03	955.18	3.13%
Food & Wine	800,000	907,917	139.43	128.24	8.73%	918.15	933.37	-1.63%
Gourmet	900,000	956,698	176.00	212.35	-17.12%	1,029.71	1,040.17	-1.01%
Category Total			**594.54**	**583.19**	**1.95%**	**3,906.28**	**3,981.69**	**-1.89%**
GENERAL INTEREST								
Atlantic Monthly[11]	450,000	597,948	53.31	52.27	1.99%	364.52	442.49	-17.62%
Biography	625,000	690,046	33.17	41.73	-20.51%	347.74	340.88	2.01%
Harper's Magazine	205,000	213,850	19.66	25.50	-22.90%	213.31	257.74	-17.24%
National Geographic	7,700,000	7,812,564	31.42	41.16	-23.66%	327.77	339.62	-3.49%
People en Español[10]	325,000	340,215	70.58	81.02	-12.89%	533.68	534.19	-0.10%
Reader's Digest	12,500,000	2,551,090	93.68	101.59	-7.79%	923.96	994.92	-7.13%
Smithsonian	2,000,000	2,028,133	79.41	76.59	3.68%	555.95	593.79	-6.37%
Talk	600,000	650,660	60.31	65.90	-8.49%	521.58	506.72	2.93%
Vanity Fair	1,000,000	1,092,382	238.91	260.67	-8.35%	1,505.43	1,601.70	-6.01%
Category Total			**680.45**	**746.43**	**-8.84%**	**5,293.94**	**5,612.05**	**-5.67%**
HEALTH/FITNESS (MEN)								
Flex	150,000	154,290	167.00	188.12	-11.23%	1,700.63	1,658.97	2.51%
Muscle & Fitness	None	458,593	128.49	152.97	-16.00%	1,414.38	1,398.27	1.15%
Runner's World	505,000	520,334	32.25	45.38	-28.93%	334.11	405.70	-17.65%
Category Total			**327.74**	**386.47**	**15.20%**	**3,449.12**	**3,462.94**	**-0.40%**
HEALTH/FITNESS (WOMEN)								
Fitness[11/+]	1,050,000	1,183,095	60.65	54.99	10.29%	569.57	567.96	0.28%
Health[10/+]	1,300,000	1,378,970	125.60	90.15	39.32%	766.00	727.99	5.22%
Prevention	3,100,000	3,110,642	70.25	88.90	-20.98%	893.67	1,002.04	-10.81%
Self	1,200,000	1,553,911	138.00	155.92	-11.49%	987.27	1,085.70	-9.07%
Shape	1,500,000	1,686,229	76.53	77.11	-0.75%	734.13	750.10	-2.13%
Category Total			**471.03**	**467.07**	**0.85%**	**3,950.64**	**4,133.79**	**-4.43%**

	RATE BASE (1ST HALF '01)	CIRC. (1ST HALF '01	CURRENT PAGES	PAGES LAST YR.	% CHANGE	YEAR TO DATE	YTD LAST YEAR	% CHANGE
KIDS								
Boys' Life	1,300,000	1,335,811	18.96	21.23	-10.69%	130.27	153.22	-14.98%
Disney Adventures[10]	1,100,000	1,117,932[B]	24.40	39.28	-37.88%	216.30	259.71	-16.71%
Nickelodeon Magazine[10]	900,000	941,662[B]	33.33	38.33	-13.04%	278.65	312.33	-10.78%
Sports Illustrated for Kids	950,000	963,638[B]	39.28	35.66	10.15%	298.46	267.76	11.47%
Category Total			**115.97**	**134.50**	**-13.78%**	**923.68**	**993.02**	**-6.98%**
MEN'S LIFESTYLE								
Details[10/LL]	400,000	402,449	95.00	133.00	-28.57%	652.94	133.00	390.93%
Esquire	650,000	672,700	110.33	125.83	-12.32%	777.29	840.79	-7.55%
FHM[10]	750,000	821,834	71.36	75.82	-5.88%	413.39	407.27	1.50%
Gear[10]	425,000	494,008	39.66	40.33	-1.66%	299.46	263.45	13.67%
Gentlemen's Quarterly	750,000	806,911	194.15	192.61	0.80%	1,338.25	1,469.07	-8.90%
Maxim	2,250,000	2,513,146	121.51	121.05	0.38%	964.31	924.00	4.36%
Men's Fitness	550,000	591,761	56.19	47.48	18.34%	603.45	465.26	29.70%
Men's Health[10]	1,625,000	1,688,363	68.06	85.18	-20.10%	575.94	608.21	-5.31%
Men's Journal*	600,000	635,235	95.25	114.24	-16.62%	772.00	909.89	-15.15%
Outside	600,000	664,590	61.19	91.29	-32.97%	705.45	907.66	-22.28%
Penthouse	None	715,137	40.47	36.99	9.41%	437.43	419.18	4.35%
Playboy	3,150,000	3,151,580	61.80	59.73	3.47%	516.95	528.96	-2.27%
Stuff[S]	850,000	976,384	74.93	57.20	31.00%	548.31	328.82	66.75%
Category Total			**994.90**	**1,047.75**	**-5.04%**	**7,952.23**	**8,072.58**	**-1.49%**
OUTDOORS								
Bowhunting[9]	180,000	192,668		DID NOT REPORT*		352.46	265.14	32.93%
Field & Stream	1,750,000	1,756,148	43.41	77.42	-43.93%	405.95	662.18	-38.69%
Guns & Ammo	575,000	582,208		DID NOT REPORT*		250.55	335.42	-25.30%
Handguns	150,000	151,958		DID NOT REPORT*		201.00	222.89	-9.82%
Hunting	350,000	364,513		DID NOT REPORT*		284.85	314.27	-9.36%
Outdoor Life[10]	1,350,000	1,356,997	35.67	60.28	-40.83%	297.90	467.96	-36.34%
Sports Afield	450,000	453,022	37.70	26.74	40.99%	254.43	258.72	-1.66%
Category Total			**116.78**	**164.44**	**-28.98%**	**2,047.14**	**2,526.58**	**-18.98%**
PARENTING/FAMILY								
American Baby	1,830,000	1,831,750[B]	43.06	64.42	-33.16%	460.14	475.25	-3.18%
Baby Talk[10]	1,800,000	1,800,769[B]	51.15	55.22	-7.37%	344.31	336.40	2.35%
Child[10]	920,000	944,179	68.87	67.45	2.11%	512.28	475.77	7.67%
FamilyFun[10]	1,200,000	1,232,544[X]	67.18	72.57	-7.43%	494.44	590.57	-16.28%
Family Life[10]	600,000[G]	703,634	59.23	50.79	16.62%	382.95	352.02	8.79%
Parenting[10]	1,565,000	1,604,403	131.43	128.74	2.09%	841.92	911.40	-7.62%
Parents	1,965,000	2,020,747	154.07	157.49	-2.17%	1,116.06	1,252.25	-10.88%
Category Total			**574.99**	**596.68**	**-3.64%**	**4,152.10**	**4,393.7[illegible]**	**-5.50%**
PERSONAL FINANCE								
Kiplinger's Personal Finance	1,000,000	1,030,279	60.30	68.72	-12.25%	523.37	653.05	-19.86%
Money	1,900,000	1,907,159	124.20	142.35	-12.75%	902.72	1,093.52	-17.45%
Mutual Funds	800,000	818,231	40.67	68.68	-40.78%	447.65	574.69	-22.11%
SmartMoney	800,000	809,240	80.71	136.21	-40.75%	726.51	1,014.22	-28.37%
Worth[10]	500,000	507,474	84.06	81.65	2.95%	471.06	640.85	-26.49%
Category Total			**389.94**	**497.61**	**-21.64%**	**3,071.31**	**3,976.3[illegible]**	**-22.76%**
SCIENCE/TECHNOLOGY								
Discover	1,000,000	1,005,981[X]	31.24	38.82	-19.52%	386.37	268.62	43.84%
Natural History[10]	300,000	327,481	30.83	35.00	-11.91%	248.25	259.02	-4.16%
Popular Science[10]	1,550,000	1,572,540	45.16	41.68	8.35%	344.22	439.80	-21.73%
Scientific American	655,000	696,302	20.00	22.67	-11.78%	207.84	278.10	-25.26%
Spectrum, IEEE	None	304,430[X]	45.07	55.41	18.66%	485.11	507.68	-4.45%
Category Total			**172.30**	**193.58**	**-10.99%**	**1,671.79**	**1,753.22**	**-4.64%**
SHELTER								
Architectural Digest	800,000	826,728	165.18	182.09	-9.29%	1,370.30	1,449.5[illegible]	-5.46%
Country Living	1,600,000	1,631,178	105.25	101.55	3.64%	838.43	877.11	-4.41%
The Family Handyman[10]	1,100,000	1,179,408	57.25	63.00	-9.13%	461.83	576.01	-19.82%
Home[10]	1,000,000	1,006,893	98.99	128.57	-23.01%	695.84	813.72	-14.49%
HomeStyle[10]	850,000	974,336	71.48	77.85	-8.18%	398.86	488.07	-18.28%
House Beautiful	850,000	866,243	89.47	142.00	-36.99%	796.02	923.29	-13.78%
House & Garden	750,000[G]	753,186	167.70	106.60	57.32%	903.62	898.80	0.54%
Southern Living[13]	2,500,000	2,546,005	120.46	118.90	1.31%	1,217.72	1,285.36	-5.26%
Sunset	1,425,000	1,448,041	101.76	104.06	-2.21%	970.64	1,144.65	-15.20%
This Old House[10/H]	715,000	804,596	74.74	87.79	-14.87%	707.92	706.85	0.15%
Category Total			**1,052.28**	**1,112.41**	**-5.41%**	**3,361.18**	**9,163.29**	**-8.75%**
TEEN								
CosmoGirl![10]	750,000	790,124	54.03	52.87	2.19%	477.13	431.27	10.63%
Seventeen	2,350,000	2,370,013	96.96	117.43	-15.73%	1,137.21	1,204.02	-5.55%
Teen	2,000,000	1,871,111		DID NOT REPORT*		391.74	423.76	-7.56%
Teen People[10]	1,600,000	1,611,579	84.27	89.54	-5.89%	873.34	849.57	2.80%
YM[10]	2,200,000	2,276,939	67.89	44.41	52.87%	640.68	444.27	44.21%
Category Total			**305.15**	**304.25**	**0.30%**	**3,520.10**	**3,352.89**	**4.99%**
TRAVEL								
Condé Nast Traveler	750,000	801,795	108.86	125.58	-13.3[illegible]%	1,142.75	1,229.0[illegible]	-7.02%
Travel + Leisure	925,000	997,538	208.53	226.69	-8.01%	1,432.23	1,463.6	-2.14%
Travel Holiday[10]	650,000	657,891	71.67	60.99	17.51%	694.50	532.02	30.54%
Category Total			**389.06**	**413.26**	**-5.86%**	**3,269.48**	**3,224.65**	**1.39%**
WEALTH								
Robb Report	None	100,163	146.16	179.30	-18.48%	1,224.66	1,313.0	-6.73%
Town & Country	425,000	438,132	184.72	228.42	-19.13%	1,216.68	1,239.4	-1.84%
Category Total			**330.88**	**407.72**	**-18.85%**	**2,441.34**	**2,552.48**	**-4.35%**
WOMEN'S LIFESTYLE								
Martha Stewart Living[10]	2,150,000	2,404,751	180.52	203.90	-11.47%	1,448.25	1,398.3	3.57%
More[10/++]	600,000	600,086	69.68	88.00	-20.82%	528.89	362.84	45.76%
O, The Oprah Magazine[O]	1,300,000	2,751,563	142.81	165.14	-13.52%	1,112.88	627.04	77.48%
Real Simple[A]	700,000	784,307	62.00	55.00	12.73%	405.00	424.00	-4.48%
Rosie[M]	3,500,000[G]	4,003,261	75.30	N.A.	N.A.	479.75	N.A.	N.A.
Victoria	950,000	990,313	39.61	64.27	-38.37%	311.68	397.56	-21.60%
Category Total			**569.92**	**576.31**	**-1.11%**	**4,286.45**	**3,209.62**	**33.54%**
WOMEN'S SERVICE								
Better Homes and Gardens	7,600,000	7,604,634	157.18	168.83	-6.90%	1,475.68	1,564.4[illegible]	-5.67%
Family Circle[+/13]	5,000,000	5,002,906	107.95	102.60	5.21%	1,038.36	1,029.7[illegible]	0.84%
Good Housekeeping	4,500,000	4,534,716	163.28	166.54	-1.96%	1,289.01	1,245.3[illegible]	3.50%
Ladies' Home Journal	4,100,000	4,100,431	126.45	123.42	2.46%	1,015.46	1,075.4	-5.57%
Redbook	2,250,000	2,299,626	138.26	169.03	-18.23%	1,068.85	1,209.6[illegible]	-11.64%
Woman's Day[17]	4,050,000	4,055,014	125.10	138.51	-9.66%	1,292.77	1,455.5[illegible]	-11.18%
Category Total			**818.22**	**868.93**	**-5.84%**	**7,180.13**	**7,580.[illegible]**	**-5.28%**
MEDIAWEEK MONITOR TOTALS			**13,024.19**	**14,414.66**	**-9.65%**	**119,601.28**	**126,779.25**	**-5.66%**

*=Primedia was not ready to report the titles it had acquired recently from Emap.

Footnotes: rate base and circulation figures according to the Audit Bureau of Circulations for the first half of 2001; B=audited by BPA International; C=non-audited title; X=did not file audit by deadline; A=launched in 4/00; M=launched in 5/01; O=launched in 5/00; P=launched on 11/00; G=raised rate base during period; S=launched as a monthly on 8/00; LL=relaunched in 10/00; 9=published nine times per year; 10=published 10 times; 11=published 11 times, 13=published 13 times; 17=published 17 times; +=will publish one more issue in 2001; ++=will publish two more issues in 2001, @=will publish one fewer issue in 2001; H=Extra SIP in 2001.

represents British Airways. "We've been trying to do the more practical things of getting passengers rerouted and worrying about security. Advertising is secondary at this point."

Travel advertisers, mostly airlines, including Virgin Atlantic and Alitalia, have been calling publishers to get out of November; but given that some titles are already closed, December will be the issue more likely affected. But the one saving grace, say publishers, is that the bulk of airline ads will have already run in previous issues. "December is not typically a huge travel-advertising month, so we consider ourselves fortunate," says Ellen Asmodeo, vp/publisher of *Travel + Leisure*. "We're more heavy on retail." Asmodeo says she expects to see a surge of ads from car rentals and predicts airlines will return to the fold by March or April.

Though both *T + L* and *Traveler* count travel ads as half their business, Asmodeo and Hughes say they are still bullish about their other business, which includes some automakers and luxury goods. "We've gone through this before with the Gulf War," says Hughes. "People will travel for business, and they will travel for pleasure. We bounced back very quickly after one year of softness." In '91, travel spending in magazines fell 8.2 percent, to $335.5 billion, according to CMR. —*LG*

Cover Stories

Editors pick iconic images

With a bevy of images to choose from, magazine editors are going with their gut, choosing powerful moments that have begun to transform many of their covers into iconic timepieces.

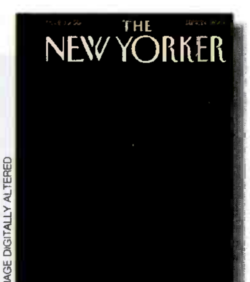
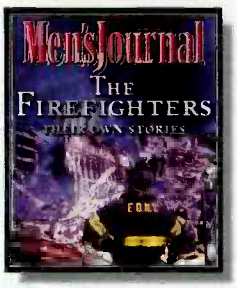


IMAGE DIGITALLY ALTERED

The New Yorker, which had initially considered the unprecedented move of running an actual photo on its cover, opted to stay the course with an illustration. *New Yorker*'s Art Spiegelman, best remembered in recent years for his "shooting gallery" cover protesting the death of Amadou Diallo, created a striking black-on-black illustration of the Twin Towers. "The whole thing was to be able to see something and not see it," notes Spiegelman, who with his wife, Françoise Mouly (*New Yorker*'s cover-art editor), saw the World Trade Center attacks in front of their home. "At first you think it's a black cover, but when you look [closely], there is that heart-stopping moment that was there when I saw the two towers fall."



The image of a lone businessman walking amid the debris with his briefcase caught *Fortune* managing editor Rik Kirkland's eye early on. "There was something about this guy—one individual still holding his briefcase—walking through the rubble that just captured the spirit that human beings are involved in this," explains Kirkland. "Our readers were involved in this, they were on the front lines, and we need to show one of them rather than the building blowing up. It set the tone of our coverage." *Fortune*'s Oct. 1 "Up From the Ashes" issue hits stands today.

While weeklies and biweeklies had an opportunity to shift gear, most monthlies could only add a sprinkling of coverage into their November issues. However, *Men's Journal* proved to be an exception, pushing up its cover date by two weeks. On stands Sept. 26, *Men's Journal* scrapped its "Fall Weekends Around America" cover in favor of a tribute to the firefighters. And weeklies, like *People*'s Oct. 1 "America Unites" cover, are also now focusing on the heroes, stories of inspiration, and patriotism.

For *Newsweek*'s Sept. 24 issue, editor Mark Whitaker picked the image of firefighters raising a U.S. flag above the rubble of Wall Street. "It's [now] a story not only of terror, but also the spirit of patriotism, of the determination of not letting the terrorists beat us. We really wanted to capture that spirit." —*LG* ■

WEEKLIES September 24, 2001

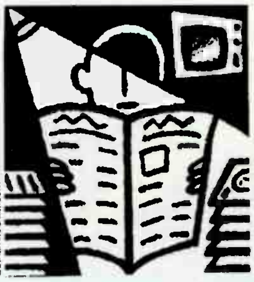
Despite the July redesign of Vulcan Ventures' *The Sporting News*, the weekly continues to see a decline in ad pages. Earlier this year, Detroit put on the brakes, and dot-com spending dried up, notes *TSN* senior vp/publisher Francis Farrell. Through the Sept. 24 issue, *The Sporting News* was down 22.28 percent YTD. Time Inc.'s *Sports Illustrated* is also down, by 16.64 percent. —*LL*

	ISSUE DATE	CURRENT PAGES	ISSUE DATE LAST YEAR	PAGES LAST YEAR	PERCENT CHANGE	YTD PAGES	YTD LAST YEAR	PERCENT CHANGE
NEWS/BUSINESS								
BusinessWeek	24-Sep	88.36	25-Sep	118.03	-25.14%	2,773.96	4,272.53	-35.07%
The Economist	15-Sep	48.00	16-Sep	65.00	-26.15%	1,913.00	2,193.50	-12.79%
Newsweek[E]	24-Sep	17.73	25-Sep	42.78	-58.56%	1,186.47	1,613.03	-26.44%
The New Republic	24-Sep	9.33	25-Sep	10.47	-10.89%	321.12	312.42	2.78%
Time[E/@]	24-Sep	19.46	25-Sep	71.37	-72.73%	1,658.01	2,032.70	-18.43%
US News & World Report	24-Sep	11.00	25-Sep	38.09	-71.12%	996.18	1,304.72	-23.65%
The Weekly Standard	1-Oct	10.00	2-Oct	14.00	-28.57%	348.50	350.00	-0.43%
Category Total		**203.88**		**359.74**	**-43.33%**	**9,197.24**	**12,078.90**	**-23.86%**
SPORTS/ENTERTAINMENT/LEISURE								
AutoWeek	24-Sep	25.41	25-Sep	22.33	13.79%	1,050.00	1,116.11	-5.92%
Entertainment Weekly	21-Sep	36.00	22-Sep	29.36	22.62%	1,262.69	1,358.29	-7.04%
Golf World	21-Sep	33.67	22-Sep	14.32	135.13%	946.68	1,172.54	-19.26%
New York[1]	24-Sep	44.00	24-Sep	88.80	-50.45%	1,943.80	1,913.00	1.61%
People	24-Sep	55.73	25-Sep	85.62	-34.91%	2,586.07	2,903.15	-10.92%
The Sporting News	24-Sep	7.70	25-Sep	7.00	10.00%	360.00	463.20	-22.28%
Sports Illustrated	24-Sep	38.14	25-Sep	74.70	-48.94%	1,705.80	2,046.20	-16.64%
The New Yorker	24-Sep	27.37	25-Sep	33.53	-18.37%	1,500.52	1,564.60	-4.10%
Time Out New York			NO ISSUE[*]			2,433.31	2,623.50	-7.25%
TV Guide[X]	22-Sep	82.02	23-Sep	41.44	97.92%	2,020.98	2,233.78	-9.53%
US Weekly[6/D]	24-Sep	38.33	25-Sep	20.00	91.65%	715.52	686.29	4.26%
Category Total		**388.37**		**417.10**	**-6.89%**	**16,525.37**	**18,080.66**	**-8.60%**
SUNDAY MAGAZINES								
Parade[X]	23-Sep	9.63	24-Sep	13.04	-26.15%	421.55	449.34	-6.18%
USA Weekend[X]	23-Sep	8.00	24-Sep	10.75	-25.58%	411.24	418.78	-1.80%
Category Total		**17.63**		**23.79**	**-25.89%**	**832.79**	**868.12**	**-4.07%**
TOTALS		**609.88**		**800.63**	**-23.82%**	**26,555.40**	**31,027.68**	**-14.41%**

E=estimated page counts; X=YTD included an extra issue in 2000; 1=one more issue in 2001; 6=six more issues in 2001; D=double issue this year; @=one fewer issue in 2001, *=Missed publication due to events in New York

Media Person

BY LEWIS GROSSBERGER



See the Gumshoes Plod

WELL, DESPITE EVERYTHING, THERE WILL BE A NEW TELEVISion season, even though it's hard for Media Person to see how that will help the international coalition against terrorism do its job. But we do need entertainment as much as we need food and air. Because without entertainment we can't…we can't…um…OK, just take MP's word for it. We need it. And so it follows that we must also have Media Person's Annual Fall TV Preview, the 100 percent genuine Fall TV Preview, the only preview written by someone not prejudiced by actually having seen the shows involved. Beware of shoddy imitations.

The Education of Max Bickford (CBS, Sundays, 8 p.m.): Can the laid-back, unassuming Richard Dreyfuss convincingly play a pompous, garrulous, totally obnoxious professor who thinks he knows everything? It's a real stretch, but Media Person feels this veteran actor can do the job!

Band of Bursars (HBO, Sundays, 10 p.m.): College financial officers from all over the U.S. are brought together in an elite unit and trained to parachute into Europe and suck millions of euros out of unsuspecting German parents. Tom Hanks and Steven Spielberg team up to overproduce this landmark miniseries, which also features a panel of really old guys trying desperately to remember where they were when they did some great stuff.

Law & Order: Criminal Intent (NBC, Sundays, 9 p.m.): Why people keep watching these plodding Dick Wolf gumshoes and DAs is something MP has never understood. They have no personalities! They're all the same! Hasn't anyone ever noticed this? Where is the outrage? Oh, well, Media Person will continue his lonely, thankless task of warning a world that doesn't seem to care.

Bob Patterson (ABC, Tuesdays, 9 p.m.): Right away, the name says bad. Why Bob Patterson? It's not as funny as George Costanza or Max Bickford or even Larry David, which if reversed would be David Larry. It's a deracinated, white-bread, bland, watered-down mainstream-entertainment type of name, entirely unbefitting the short, balding, neurotic Jason Alexander. A much better name for him would be, oh, I don't know, Schwartz.

WHY BOB PATTERSON? IT'S A DERACINATED, WHITE-BREAD, BLAND, WATERED-DOWN MAINSTREAM-ENTERTAINMENT TYPE OF NAME.

Inside Schwartz (NBC, Thursdays, 8:30 p.m.): Some famous actor Media Person never heard of plays a sportscaster named Schwartz, or possibly a schwartzcaster named Sports. The gimmick here is that real-life athletes do color commentary on Schwartz's life. To see this gag done first and best, rent Woody Allen's *Bananas*, wherein Howard Cosell handles the play-by-play as Woody has sex with Louise Lasser.

According to Jim (ABC, Wednesdays, 8:30 p.m.): Jim Belushi—and how did he ever get to be a star anyway?—plays a sensitive dad with an adorable baby. Shall we all throw up in unison, or do you prefer to vomit on your own?

Raising Dad (WB, nobody cares when): No, the regurgitation is going to have to be a coordinated effort, MP sees that clearly now. We must work together or surely we shall perish. Bob Saget is the single father in this stomach turner.

Scrubs (NBC, Tuesdays, 9:30 p.m.): You know, the really efficient thing about turning *ER* into a sitcom is you can use the same scripts but just add a laugh track and tell your actors to drop things.

The Mind of the Married Man (HBO, Tuesdays and Sundays, 10 p.m.): An examination by expert psychologists determines that he doesn't have one.

The Ellen Show (CBS, Fridays, 8 p.m.): Ellen DeGeneres returns to sitcom land as a dot-com-crash refugee who goes back to her small hometown, where everyone she runs into asks her, "Hey, Ellen, is it true you gave Ann Heche the best sex she ever had?"

Emeril (NBC, Tuesdays, 8 p.m.): Do you realize that when anagrammed, Emeril can become rile me, re: lime, mere LI and leer 'im? These are things Media Person feels you need to know.

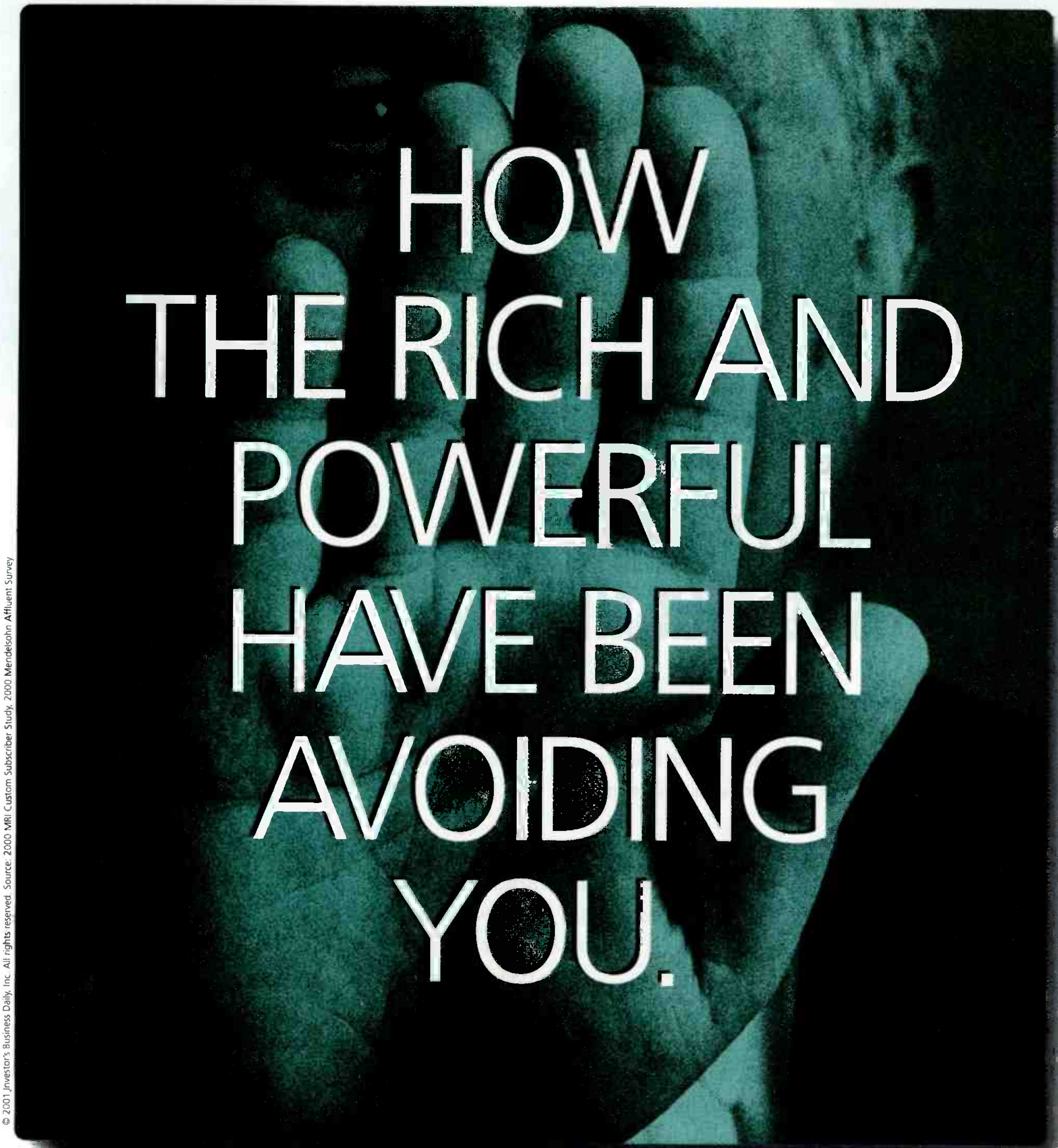
Wolf Lake (CBS, Wednesdays, 10 p.m.): Cops battle a coven of single-dad werewolves who have moved back to their small hometown where they could raise their cute, wisecracking cubs and teach them to tear out the throats of comically eccentric rural folk.

Philly (ABC, Tuesdays, 10 p.m.): Kim Delaney goes from *NYPD Blue* to *Pa. Sue*. The former cop babe, now a lawyer babe, specializes in lots of sighing and other annoying actor mannerisms. There was a time when Steven Bochco showed so much promise, too.

What Big Teeth You Have (Animal Planet, Fridays, 3 p.m.): A single-dad shark, who's raising a litter of shark pups on his own, has to cope with their wacky high jinks while finding the time to do his demanding job biting surfers at a nearby beach. Tony Danza stars.

The Tick (Fox, Thursdays, 8:30 p.m.): A large bug in a superhero outfit fights crime by dropping onto the backs of perpetrators from trees and engorging himself with their blood until they grow dizzy and fall down. Then he naps for a couple of weeks, goes out and repeats the same sickening process. Sponsored by Raid.

The Agency (CBS, time and day classified): Gil Bellows, last seen as a bleached-blond ghost on *Ally McBeal*, plays a CIA man, hunting for information about foreign agents. As the show is strictly realistic, he never finds any. ■



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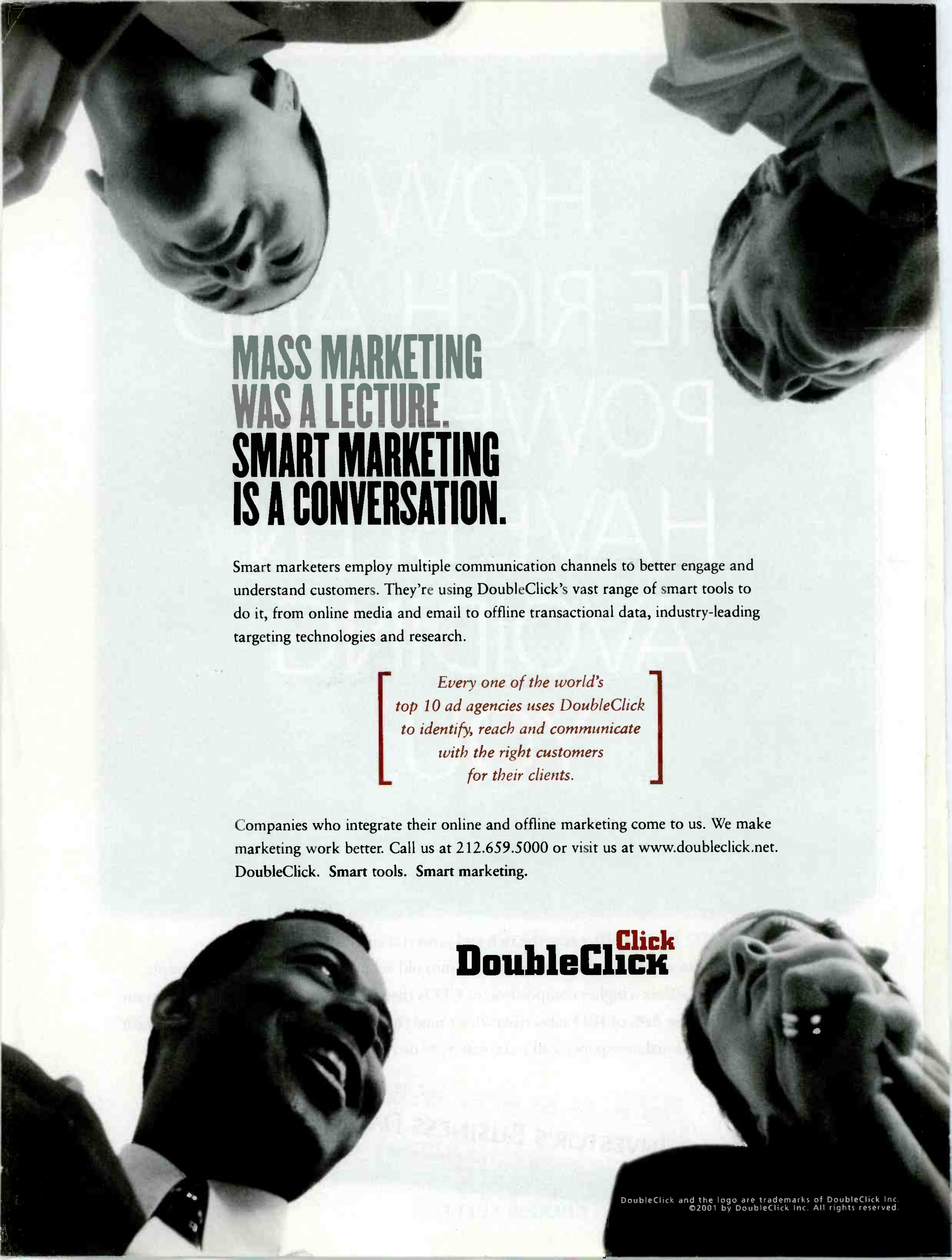
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