

# MEDIAWEEK

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THE NEWS MAGAZINE OF THE MEDIA

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While law limits political ads, big dollars still expected to find broadcasting avails **PAGE 4**

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Says league best served by broadcast coverage **PAGE 6**



# Buying The Election

Ad spending records are expected to be shattered as the presidential hopefuls build their war chests and assemble their strategy teams  
**BY TODD SHIELDS PAGE 22**



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Source: 2002 Scarborough Top 50 Markets

# At Deadline

## ■ CBS UNVEILS SPONSORS AROUND SUPER BOWL

CBS last week announced the sponsors of its Super Bowl XXXVIII pre-game and post-game coverage on Sunday, Feb. 1. Pepsi will sponsor *CBS Sports Presents: MTV's TRL @ The Super Bowl* from 12 noon to 1 p.m. General Motors and Cadillac will sponsor *The Phil Simms 2003 All-Iron Team* telecast from 1-2 p.m. Sponsors of *The Super Bowl Today* pre-game show that will air from 2 p.m. to 6 p.m. include Wachovia (2-3 p.m.), Pizza Hut (3-4 p.m.), Sony PlayStation (4-5 p.m.), H&R Block (5-5:30 p.m.) and RadioShack (5:30-6 p.m.). Ford is the title sponsor of the *Ford Super Bowl Kick-Off Show* from 6-6:25 p.m. Monster.com will sponsor the halftime report, Cadillac will sponsor the post-game show, and America Online will sponsor the Super Bowl halftime show.

## ■ GANNETT TARGETS YOUTH

Gannett Co. next year plans to launch four more weekly publications aimed at young readers. The papers would complement Gannett's community dailies in Rochester, N.Y., Wilmington, Del., Greenville, S.C., and Pensacola, Fla., and would bring to 10 the number of free weekly papers Gannett has launched in its local markets since fall 2002.

## ■ IRTS BENEFIT GETS BIG LAUGHS

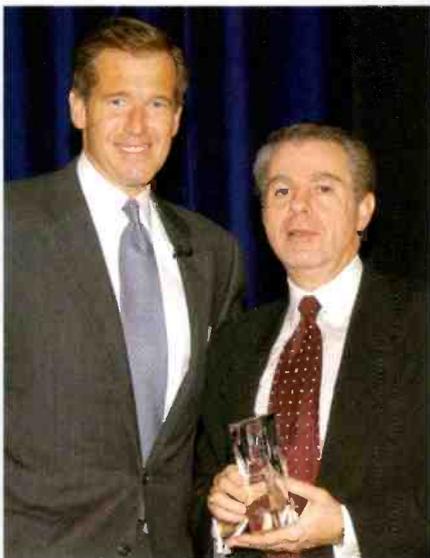
The International Radio & Television Society Foundation held a parody of Fox's *American Idol* during its annual holiday benefit luncheon last week, which featured CBS executive vp of research and planning Dave Poltrack, former CNN news anchor Connie Chung, and assorted media buyers and TV sales execs singing spoof songs in front of more than 500 industry colleagues. ABC New York weatherman Sam Champion portrayed show host Ryan Seacrest. Poltrack sang, "Where Have All the Young Men Gone?" referring to the lost men 18-34 TV viewers this season, while Chung sang "Don't Cry for Me, Maury Povich," crooning, "We're hardly rejects, 'cause CNN must keep sending the checks." Others who offered their singing talents from the buying side were Larry Blasius, MagnaGlobal USA; Mel Berning, MediaVest; Alec Gerster, Initiative; Peggy Green, Zenith Media; Debbie Richman, OMD; and Nanci Samuels,

MindShare. TV execs included Jim Burnette, Fox, and Jeff Lucas, Universal Television.

## ■ WESTWOOD'S NETS ADDS 55 RADIO STATIONS

Westwood One will be adding 55 radio stations to five of its RADAR-rated networks beginning Jan. 1. The stations, owned by Infinity Broadcasting, were acquired by the company in 1998, but up until now, were not part of Westwood's network roster. Most of the stations are in the top 50 markets and primarily target younger, female-leaning audiences. Inventory from the new stations will be added to Westwood networks CBS, CNNMax, NBC, Source Max and NeXt, boosting audience levels by 5 percent or more.

■ **ADDENDA:** Fox has teamed with *Survivor* creator Mark Burnett on *The Casino*. Set to debut in summer '04, the reality drama will focus on the relaunch of the once-famous Golden Nugget casino...Game Show Network's senior vp of programming **Bob Boden** unexpectedly left the Sony-owned cable network last week. His successor has not been named, though vp of programming Kevin Belinkoff will serve as the interim programming chief...Sci Fi Channel's miniseries *Battlestar Galactica* earned an average 3.5 household rating and delivered 4.2 million viewers 2-plus during its Dec. 8-9 premiere...The **U.S. Senate** last week failed to agree upon a giant spending bill that includes a limit on how many stations TV networks may buy. That moves action on the measure to Jan. 20 when the Senate next convenes.



**STAR POWER:** NBC News' Brian Williams (left) regaled guests at the Media All-Stars lunch honoring Group M's Irwin Gotlieb and others.

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■ **CORRECTION:** In the Nov. 24 Spotlight on the producers of Oxygen's *Girls Behaving Badly*, the caption IDs were mistakenly flipped; John Stevens is actually on the left, Barry Poznick on the right.

■ **HAPPY HOLIDAYS FROM MEDIaweek:** *Media-week* will not publish issues on Dec. 22 or Dec. 29. The next issue will come out on Jan. 5. We wish all our readers a safe and happy holiday season and a prosperous 2004.

## Market Indicators

**NATIONAL TV: SLOW**  
Buyer-friendly scatter prices are being offered in prime time as networks scramble to sell as much remaining fourth-quarter inventory as possible. Morning daypart remains the busiest.

**NET CABLE: WARMING**  
As the 12 days of Christmas get underway, sales executives are having a better time than in November. Retail, wireless and studios are spending and calendar-year deals have largely been settled. First-quarter scatter starting to move.

**SPOT TV: ACTIVE**  
Retail picking up, but most buyers are focused on January and February amid concerns of tightness caused by political spending. Strong categories include automotive, retail, furniture and housewares.

**RADIO: FESTIVE**  
Holiday retail picking up in December. January and February are pacing well ahead of last year, driven by a broad range of categories, including auto and tune-ins advertising for Feb. sweeps.

**MAGAZINES: WRAPPING**  
News, business, and entertainment weeklies and biweeklies are finishing up the year with brisk spending from telecom and wireless, as well as from electronics, videogames, pharmaceuticals and automotive.

### Radio Groups Threaten to Exit Unless RAB Evolves

The Radio Advertising Bureau is being pressured by the industry to change its mission to more aggressively market the medium to advertisers. And if they don't act soon, groups such as Infinity Broadcasting are threatening to pull out.

"The RAB needs to become a sales organization rather than a service organization," said David Field, Entercom Communications CEO. "We've done precious little to compete with other media."

Since April, a growing number of radio executives have questioned the role of the marketing organization after Mel Karmazin, Viacom COO, decried the industry's poor job of positioning radio in a soft advertising marketplace.

"The RAB has a \$7 million budget but only one sales and marketing exec. We need to redeploy people to talk about the positive things radio does," said Joel Hollander, COO of Infinity, who is leading the charge. Hollander organized meetings among the group heads, which included Field and John Hogan, CEO of Clear Channel Radio. About six weeks ago, the group began meeting with RAB president Gary Fries to tell him they wanted the RAB to change course.

Fries said he's already taken steps to shift the focus of the RAB. "We've wanted to do this for some time, but the industry has never supported it," said Fries. "We've been laying out strategy for the past 30 days and there will be elements that will be implemented around the first of the year. It's going to be huge," Fries promised. —*Katy Bachman*

### Univision Breaks New Ads; Creates Cross-Media Deals

Hispanic television network Univision is getting fourth-quarter scatter cost-per-thousand ad rate increases of between 4 percent to 7 percent above its upfront deals, and has brought seven new, major advertisers into the fold, according to Ron Furman, executive vp of network sales. The new advertisers include Visa, Old Navy, Office Depot and Energizer.

Furman noted at the annual UBS Media Conference last week that Univision is still (continued on page 6)

# McCain-Feingold Limits Political Ads

But the law, seen by many as porous, is unlikely to curtail big spending

WASHINGTON By Todd Shields

**T**he U.S. Supreme Court ruling on campaign finance reform could leave TV stations with more available ad inventory for non-political spots in the weeks before next fall's presidential election, even though overall spending on political ads is likely to remain strong, media professionals said.

The high court last week upheld the most profound campaign finance reform in decades, ruling 5-to-4 that Congress may prohibit unrestricted donations to political parties and may regulate some political advertising. Justices John Paul Stevens and Sandra Day O'Connor, writing for the majority, characterized the law in question as an effort "to confine the ill effects of aggregated wealth on the political system."

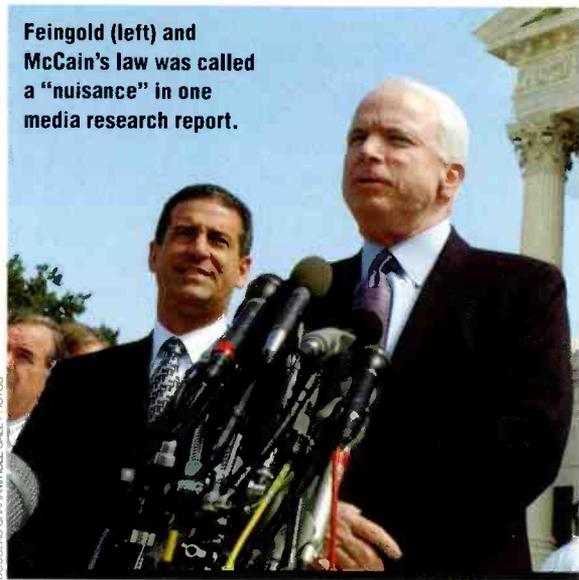
The validated statute, known as the McCain-Feingold law after sponsors Sen. John McCain (R-Ariz.) and Sen. Russ Feingold (D-Wisc.), prohibits so-called "soft money," or unrestricted anonymous donations to political parties. The law also forbids so-called "issue ads" from being aired 30 days before a primary election and 60 days before a general election. Such ads, often funded by soft money, skirted financing restrictions by not specifically urging votes for or against a candidate. But they typically stated a candidate's name and told viewers about the candidate.

An estimated \$450 million was spent on issue ads during the 2000 presidential election. The new restrictions mean that next year, they are likely to add up to only as much as can be squeezed through loopholes. That could leave stations with more available ad inventory for any products or services not seeking federal office this fall. "My hope would be there wouldn't be as many dollars directed toward these issue ads—if it really works as they said it would," said Maribeth Papuga, senior vp/director local broadcast for MediaVest. "September,

October, there may be some easing up."

Karen Agresti, senior vp/director of local broadcast for Hill, Holliday concurred. "Any kind of limit they put on spending is going to help general advertising clear in those windows," she said, adding any fluctuations in the market for political ads could cause changes in the lowest unit rate, which is the statutory maximum that broadcasters may charge political candidates. The changes could raise or lower

Feingold (left) and McCain's law was called a "nuisance" in one media research report.



the price of the least-expensive televised commercial advertising, Agresti said.

Meredith McGehee, executive director of the advocacy group Alliance for Better Campaigns, said she feared broadcasters might compensate for the lack of issue ads by raising the lowest unit rate. "There's going to be some pressure on stations to gouge candidates," said McGehee, whose group backed McCain-Feingold and seeks more reforms.

National Association of Broadcasters spokesman Dennis Wharton rejected McGehee's assertion. "Stations are going to follow the letter and the spirit of the law and charge the lowest unit rate to candidates as we have always done," Wharton said.

Many say that despite McCain-Feingold,

smart political operatives are likely to find a way to fund advertising. Already, for instance, there has been an increase in activity by independent committees such as MoveOn.org whose fund-raising and ad buying are not restricted by the law (see story on page 22).

Observers expect TV advertising to approach or exceed levels reached during the 2000 presidential election campaign, when spending on televised political ads reached \$600 million, according to a Television Bureau of Advertising analysis of statistics gathered by TNS Media Intelligence/CMR. Last week, analysts at CIBC World Markets Equity Research told clients they regard McCain-Feingold as "a nuisance" that does not change their forecast for \$900 million in political ad spending for the 2004 election. "The estimated \$500 million of soft dollars raised in the 2002 election will find its way to candidates on an indirect basis through the use of non-profit organizations," the CIBC researchers said. ■

# Crystal Not Clear With Net

Some stations won't clear Prestige network because of 'dishonest' setup

**RADIO** By Katy Bachman

**C**ystal Media Networks, set to launch its first RADAR-rated network called Prestige in March, is off to a rocky start. A new boutique network company formed in February, Crystal devised a plan to quickly get into the network game by paying cash for its inventory—but it didn't alert stations it was buying the spots with intent to create a network.

Station managers reported the spots weren't even bought under the Crystal company name. "That was dishonest," said one station executive. "There's no way we'll accept this business, no matter how much they pay."

Crystal's maverick approach appears to be backfiring. Because of opposition by other

networks whose parent companies own the stations from which Crystal has been buying time, Crystal may not be able to guarantee to advertisers that the stations on its affiliate list will clear the spots. Multiple phone calls to Crystal were not returned.

Most networks get their inventory by providing programming or services to radio stations in exchange for commercial spots, Crystal, needing top-market clearances, decided instead to buy the inventory and resell it in its Prestige network.

Several Infinity Broadcasting stations in top markets, such as WINS-AM and WCBS-AM in New York, and WBBM-FM in Chicago, were listed by Crystal as affiliates of the Prestige network, which targets adults 25-54.

ABC Radio's WLS-AM in Chicago was also on the affiliate list. Joel Hollander, COO of Infinity, who found Crystal's practice deceptive, said his stations simply won't clear the spots. "They don't have Infinity Broadcasting stations as affiliates," Hollander insisted. He sent a letter to advertisers and agencies to clear up any confusion. "Consolidators, barter companies or other commercial rep firms such as Crystal Radio or any company representing them offering network commercials will not be accepted," wrote Hollander.

Other network execs in the business, who would not speak for attribution, said Crystal's big mistake was not coming clean up front. "It's better to say, 'This is what we're doing.' It looks like they've got something to hide," said one exec.

Agency execs weren't impressed with the tactic either. "Buyers are unlikely to purchase the network if it has a cloud over it," said Irene Katsnelson, vp/director of network radio for Universal McCann. "I'm waiting for Crystal to address the issue. I hope they can clear it up—it would be great to have another network."

Crystal is the third company in the past two weeks to add a network to RADAR, Arbitron's network radio service that measures audience to cleared commercials. ■



# Nielsen's Extended Family

Findings of new measurement study of second homes, dorms due in January

**RESEARCH** By John Consoli

**N**ielsen Media Research will share preliminary data on its extended-home TV ratings next month with three media client companies that are sponsoring the project, according to Kevin Svenningsen, senior vp of sales and marketing for Nielsen.

Svenningsen said nine college dorm rooms and 20 secondary homes of current Nielsen sample members have been wired to date, and results from those locations will be shared. The project's sponsors, Viacom (CBS and MTV), Time Warner (the WB and TBS/TNT), and Fox believe this extended measurement will ultimately capture significant unmeasured TV viewing. The wiring of dorms is particularly important to capture the viewing of younger men, who have been watching less TV this season. Under Nielsen's current measurement practices, when sample members leave for college, or when families visit their secondary homes, they are then listed as non-TV viewers.

"Until Nielsen adds an out-of-home viewing dimension to their measurement system, it cannot purport to offer definitive information on the TV viewing of these young adults," said Dave Poltrack, executive vp of research and planning at CBS. Poltrack said 49 percent of "dependent adults" view TV outside the home. "We need to answer the question of where they

are watching and what they are watching to make the Nielsen sample complete," he said.

But Nielsen's position is that if it makes extended home measurement part of its sample, it will break out the numbers separately. Alan Wurtzel, president of research and media development at NBC, believes the numbers should be included within the main sample—especially secondary home viewing.

"Secondary homes are commonplace for many families today," Wurtzel said. "They are all wired for cable, and many families spend significant time there. Nielsen doesn't break out TV viewing room by room, or set by set, so they shouldn't do so by extended home. TV viewing is TV viewing by the family." Wurtzel does believe that while college students living outside the home should be measured, they should be reported separately because they are not living at home.

Wurtzel said NBC chose not to help fund the test because it believes the cost is high and measurement of secondary homes is something Nielsen should do as part of its regular sample. "We don't believe they should charge extra for that data," Wurtzel said. "And while the WB and Fox might be interested in the levels of college viewing, we are not as interested." Nielsen is owned by *Mediaweek* parent VNU. ■

just nibbling at crumbs of the total U.S. ad pie, stating that no current advertiser "overspends" and that there are a large number of advertisers that still have not made the jump into Hispanic television, particularly pharmaceutical companies.

Univision, which acquired Hispanic Broadcasting Corp.'s 65 radio stations three months ago, has created synergistic sales packages across its new radio stations and its TV network for selected programming, beginning with the annual Latin music awards show *Premio Lo Nuestro* in February. Shoulder programming related to the show will be created for the local radio stations and contests will be held, with advertiser tie-ins and sponsorships, Furman said. He also plans to put together other cross-media packages for advertisers leading up to the start of the summer Mexican soccer league telecasts in July, and for a *telenovela* special. —John Consoli

## Makeover, All of Us Aired Most Recalled Products

The latest data from Intermedia Advertising Group's new research service In-Program Performance shows that the most effective product placement in a reality series during the November sweeps was a Levi's store in the Oct. 30 episode of ABC's *Extreme Makeover*. It was followed by the placement of a GMC SUV in the Nov. 25 episode of *Queer Eye for the Straight Guy* on NBC.

In a sitcom during November sweeps, the top recalled product was a SpongeBob SquarePants doll in UPN's *All of Us*, followed by the Oscar Mayer Wienermobile in CBS' *Yes, Dear*.

The new tool from IAG measures the recall of product placement both paid and unpaid in broadcast prime-time TV. Based on a sample of 420,000 viewers, IAG supplies subscribers with qualitative data that measures how memorable product placement is and how well it fits into the story line in which it is placed. "It provides a new way to look at how consumers respond to advertising," said Kate Lynch, senior vp, global research for Starcom MediaVest Group. Citing its high price, SMG (continued on page 8)

# January's Show Flurries

Broadcast, cable set to premiere or return series in high HUT-level month

**TV PROGRAMMING** By A.J. Frutkin

**M**ore than a dozen shows—including premieres and continuing series—will launch across broadcast and cable next month when TV sets are on in greater numbers. Prime-time homes-using-TV levels last January were the year's highest among adults 18-49 (39.1), adults 18-34 (34.7) and men 18-34 (33.9).

Several media buyers noted that January's increased viewing levels are linked to consumers' post-holiday lack of disposable income and bad weather. After all, winter may be when much of the country spends most of its free time indoors. "Viewers' schedules are dictated much more by weather patterns than they are by the traditional start of the TV season," said John Rash, senior vp/director of broadcast negotiations at Campbell Mithun. "The networks are wise to fish where the fish are."

Among the bait served up on cable next

month is the Jan. 4 return of HBO's *Sex and the City* and *Carb Your Enthusiasm*. The following night, A&E launches two nonfiction series: *Airline* and *House of Dreams*. Showtime premieres *The L Word* on Jan. 18, and VH1 debuts *Bands Reunited* Jan. 19. Meanwhile, broadcasters hope to lure viewers with new installments of returning reality shows, including NBC's *Average Joe: Hawaii* on Jan. 5; UPN's *America's Next Top Model* on Jan. 13, ABC's *The Bachelorette* and *Celebrity Mole: Yucatán* on Jan. 14; and Fox's *American Idol* on Jan. 20.

Networks historically have been reluctant to launch shows close to the February sweeps, fearing station groups would favor promoting established shows over newer ones. "But if you launch early enough, stations now seem willing to get behind programs, because you have some momentum going into February," said Rusty Mintz, senior vp of programs, schedules and acquisitions at the WB, which premieres season two of *The Surreal Life* on Jan. 11.

Despite the rising number of launches, TV execs maintained January is still less crowded than the fall. "It may look like a logjam, but as long as there are enough different places and time periods for these shows to be seen in, I think we all have a chance at attracting viewers," said Steve Leblang, senior vp of strategic planning and research at FX, which launches reality show *Todd TV* on Jan. 21.

Brad Adgate, senior vp, director of corporate research at Horizon Media, said next month's launches may simply be the result of a lackluster fall, noting that "the current shows aren't working." ■



The WB hopes *The Surreal Life*, starring Erik Estrada, will give it buzz heading into February.

# Fox Sports' Next 10 Years

David Hill says network plans to keep carrying NFL, Nascar and baseball

**TV SPORTS** By John Consoli

**F**ox Sports chairman and CEO David Hill, who this week is celebrating the 10th anniversary of Fox winning the bidding rights to televise National Football League games for the first time, said he foresees his network continuing to air NFL games over the next decade. While Hill would not comment on what Fox is willing to pay to renew those rights, which now cost the network

\$550 million a year and expire after the 2005 season, he did say that it would benefit the NFL to keep its Sunday afternoon telecasts on broadcast rather than cable TV.

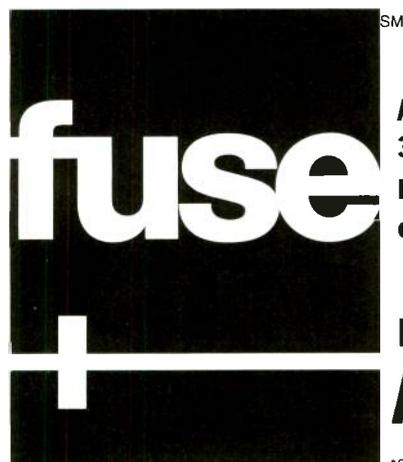
"If the sports leagues want to continue to increase their audience base, it behooves them to keep their sports on broadcast network television," Hill told *Mediaweek*. "Once a sports league leaves free, over-the-air [TV], they risk

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\*Source: Jack Myers Teen Media Brand Tracker surveyed 1,300+ teens. All figures quoted in this advertisement are for teens 15-18 who have viewed Fuse in the past thirty days.

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## Media Wire

does not subscribe to the service, but Lynch said it is something to keep an eye on. —Megan Larson

### Tribune Names FitzSimons Chair, Sells Golf Channel

Dennis FitzSimons, president/CEO of Tribune Co., will add the title of chairman on Jan. 1, succeeding John Madigan, who is retiring.

Tribune also announced last week at the UBS media conference that it will grow its Superstation WGN by 7 million households over the next four years. The network currently reaches 58 million homes. Tribune also streamlined its portfolio by selling its 8.6 percent stake in the Golf Channel to Comcast for \$100 million. —ML

### New 'Content & Contact' Category Added to Clios

The 45th Clio Awards, to be held in Miami Beach, Fla., from May 15-18, will feature a new category next year called "Content & Contact," intended to showcase innovative ad campaigns fused with unusual executions in media. The category will be chaired by Nick Brien, president of corporate business development at Starcom MediaVest Group. Brien said that a "perfect example" of a winner would be Crispin Porter+Bogusky's award-winning work for auto client Mini Cooper, which married a freshly conceived ad campaign with unusual media placement. "This category...rejects the paradox of the separate creative and media agencies at a time when they should be working together more closely than ever," said Brien. Other jury members include Paul Woolmington of The Media Kitchen and Naoko Katayama of Dentsu in Japan representing the media side, as well as creative directors Ty Montague of Wieden+Kennedy New York and Andy Berlin of Berlin Cameron/Red Cell.

Any submitted effort that ran in 2003 has to reach Clios offices by Jan. 15, 2004, and any work that runs in the first quarter of 2004 must be submitted by Feb. 1. The Clios are owned by Mediaweek parent VNU.

[not] growing their sport and gaining viewers. The NBA drank from the poisoned chalice of sports rights fees and moved from broadcast to cable and the number of people they are reaching is down, while Nascar has done the opposite and [its audience has] grown."

"I imagine the light will be burning brightly late at night on Park Avenue [home to the NFL's New York headquarters] as [league officials] decide how they will proceed on this in the future. That's a league problem, not a broadcast network problem," Hill added.

Hill also expects to keep Nascar telecasts on Fox through the next decade, as well as Major League Baseball, with the network perhaps adding some college football. Beyond that, he said, "I honestly don't know what the broadcast side of Fox Sports will look like 10 years from now, but on the cable side, we hope to have a number of thematic cable networks—at least five—up and running; to have a video-on-demand presence; to move into the pay-per-view area; and to have one or two channels purely for broadband access."



Hill: The leagues need to stick with free TV.

## Staying on the Coarse

FCC's Cops and Martin decry latest indecency fine as inadequate

WASHINGTON By Todd Shields

The Federal Communications Commission last week announced what it called the maximum fine of \$27,500 against Infinity Broadcasting for an indecent radio broadcast. The action sparked bipartisan protests from two of five FCC commissioners who argued the fine was not tough enough.

Commissioner Kevin Martin, a Republican, and Commissioner Michael Copps, a Democrat, each issued separate criticisms of the handling of the case involving WKRF-FM in Detroit. On Jan. 9, 2002, the station's afternoon drive on-air team of Jeff Deminski and Bill Doyle broadcast listeners' phoned-in graphic descriptions of sexual practices.

Infinity, which had contested the fine, last week said it was studying further options. Martin issued a statement saying the agency should have levied the maximum penalty for each of nine callers, a total of \$247,500.

VOD telecasts would have to be sports shoulder programming because Fox's rights to televise pro sports "begin and end with the telecast—anything beyond that we would need league approval," said Hill. Those types of rights would have to be negotiated with the league, probably in the new contract, assuming Fox wins the bid.

While Fox is now televising some of its NFL games in high definition and some of its Fox Sports Net basketball games in high def, it will be a rollout process of several years before all of its sports telecasts are in high def, acknowledged Hill. "It's a lot simpler to do one game each week in high definition than eight NFL games on Sunday," he said. "It's a lot of investment in equipment, and advertisers are not going to be willing to pay 20 percent more to be in a high-definition telecast."

While Hill played no part in negotiating Fox's first deal with the NFL 10 years ago, he was hired by Fox owner Rupert Murdoch to run the new Fox Sports division literally the day after the NFL deal was announced. "A friend of mine faxed me a copy of a *Wall Street Journal* article" with the news of his hire, said Hill, who at the time was running Murdoch's Sky Sports satellite operation in Britain. "I understand it raised a lot of eyebrows at the time," the Australian-born Hill recalled. "It was like bringing a Frenchman to Britain to produce cricket matches." ■

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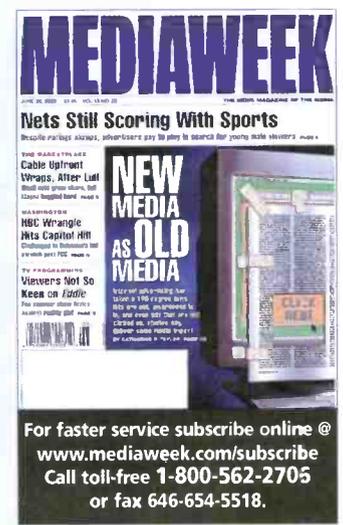
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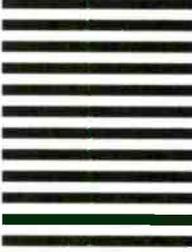
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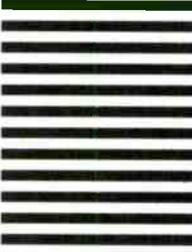
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# Better and Brighter

Media agency execs say business will improve in '04.  
The new hot spots? Cable and the Internet. BY JACK FEUER

**AT LONG LAST, OPTIMISM. SORT OF. A LITTLE BIT. WELL, OK, THE PROGNOSIS FOR 2004** is positive but very guarded. Which is the best it's been this century. As the worst economy in six decades slowly recedes, media agency executives are looking ahead without trepidation for the first time in

three years. And what they see is a mixed bag. There's the revival: All concur that online advertising will be back with a vengeance. The optimism: Almost every media agency exec is hopeful that 2004 will be the year of the planning review. The evolutionary: This could be the year clients make branded entertainment a measurable part of mainstream campaigns. And the happily obvious: An improving economy, the Summer Olympics in Athens and the November presidential election will combine to boost spending.

The prognosticators are also painting rosy pictures, most notably at last week's UBS Warburg media conference, the annual corporate show-and-tell, at which Bob Coen, senior vp of forecasting at Universal McCann, and John Perriss, CEO of Zenith Optimedia, handed down their fortunes for the industry.

This year, Perriss' usually muted prediction was bullish: He foresees U.S. ad spending rising more than 5 percent from 2003 to \$156 billion, vs. a 3 percent increase this year. The more optimistic Coen, who looks at all media including yellow pages and direct mail, was positively ebullient, predicting U.S. spending will rise 7 percent next year to \$266 billion, vs. 5 percent growth this year. And that, if it happens, would be the first time U.S. spending tickled its high-water mark—\$250 billion—since the boom year of 2000.

Much of this fanfare is due to the Olympics, which add to national TV's coffers, and the election, which mostly fattens local TV's share of ad revenue. The majority of Olympics time is already spoken for, as is 75 percent of network time in 2004, courtesy of a \$9 billion upfront. "Nationally, the robust upfront shows the ad community's response to the 'quadrennial effect,'" notes Ray Warren, managing director of OMD. "People locked in schedules well in advance, as advertisers' media plans called for broadcast and cable networks in a year when inventory was down, ratings were up, and upfront spending was up."

Underneath the good mood, the caution



**"Enormous sums of money are being spent on [cable] program development, and eventually that is going to pay off for both cable and advertisers." HORIZON'S KOENIGSBERG**

that accumulated during 36 difficult months is still hanging around. For one thing, while NBC says its Olympic package is two-thirds sold, and it did well selling the Games in the upfront, the bump-up in ad revenue may not be as great as it has been in the past. One buyer cautions that "there is less money funding the Olympics from incremental budgets than in years gone by. Advertisers are funding their Olympics expenditures from their ongoing budgeting." And sources expect major advertisers to scale back on some of their Games commitments, with the buyer suggesting that "there isn't this pot of gold at the end of the rainbow that says, 'Go buy the Olympics and spend what you want.'"

Bill Tucker, executive vp and managing director of MediaVest, whose responsibilities include oversight of Kraft's \$800 million North American media business, warns that the good news isn't guaranteed for the longer term. "Our gurus are calling for sustainable economic expansion through '04," he says, "and the Olympics and elections are clearly a boon to the media economy...[But] we got so excited during the last boom, and it wasn't sustainable. There's a feeling that there may be a void in 2005."

The driving force of the last boom, the Internet, will be hot again next year, say media agency pros. "The bubble is

back, baby!" exults Laura Caraccioli-Davis, senior vp and director of SMG Entertainment. Both Perriss and Coen cited the Internet as a factor in their upbeat outlooks, and PricewaterhouseCoopers predicts online ad revenue will reach \$7 billion next year, up 6 percent.

"The Internet age has come—three years late for all those business plans," says Paul Woolmington, CEO of independent agency The Media Kitchen. "But it truly is an awesome, underexploited opportunity." He says this on the same day his client Sci Fi Channel gets more than 63 million hits for its *Battlestar Galactica* miniseries on the Yahoo! home page.

"So what would you rather buy?" he asks. "Whatever's on TV tonight or the home page of Yahoo!?"

It won't be display ads helping online growth but paid search—which Jupiter Research says will total more than \$1.5 billion this year—and broadband, with its ability to deliver rich, streaming video to consumers. "That goes back to content," says

Caraccioli-Davis. "If advertisers are going to get embedded and own content, broadband allows us to own our own distribution. That's going to be big in '04."

While clients aren't yet shifting ad dollars away from traditional TV, "anything non-traditional, including cinema and targeted Internet buys" will get a lot of play in 2004, says Robin Kent, CEO of Universal McCann. This is not just because of the industry's obsession with "integrated communications" but because of its frustration with network TV's rising costs and decreasing viewers.

Media executives agree that the climate will be right in 2004 for buyers and clients to pressure the national broadcasters. "Network TV is going to be hard-pressed to realize the spending levels it has enjoyed," says Marc Goldstein, president of MindShare North America. "Advertisers and media agencies are going to have to deal with justifying why network spending should be as high as it has been.



**"Network TV is going to be hard-pressed to realize the spending levels it has enjoyed... This is the year there will be some push-back." MINDSHARE'S GOLDSTEIN**

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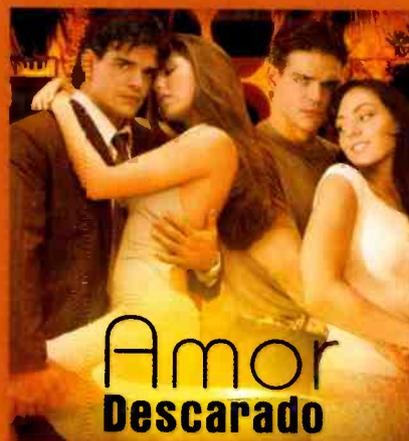


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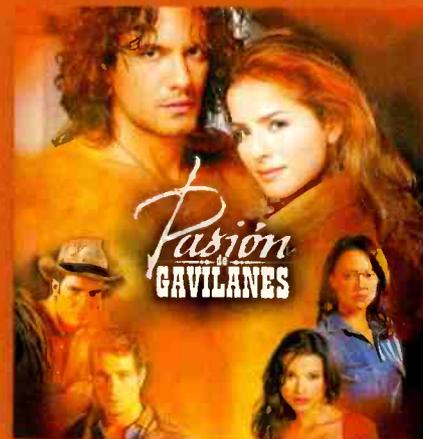


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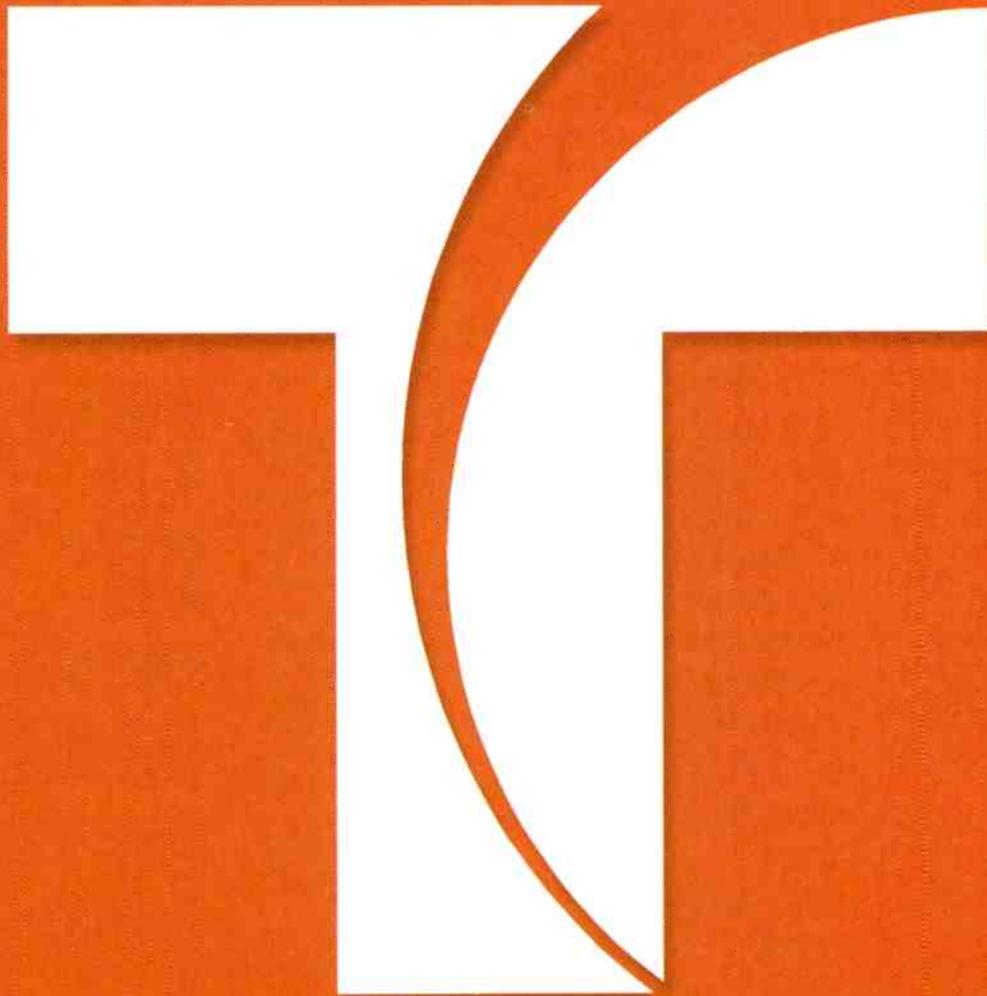
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This is the year there will be some pushback."

Liz Marks, chief marketing officer for MPG Group USA, says she sees a year of "long, tough" negotiations. "The continued inflationary pricing by the broadcast networks is becoming a very real and very serious issue for advertisers," she says. "Broadcasters are on the verge of killing the golden goose. Advertisers could easily shift budgets to spot, print or promotions."

OMD's Warren notes that advertisers are gaining the upper hand. "Broadcast network television, with the apparent loss of younger viewers and no bona fide hits or 'water cooler' shows, will continue to lose luster," he says.

Then, of course, there's TiVo. Not only is network TV "being beaten up because it is less powerful than it has been, but it doesn't appear to have stepped up to address the

two-horned devil called disintermediating technology," says Media Kitchen's Woolmington.

While a few media execs cast votes for direct response and even print (as part of integrated communications plans) as the hot media of 2004, there is unanimous acclaim for cable. Universal McCann's Coen predicts national advertisers will spend almost \$16 billion in 2004, a jump of 12 percent over this year, the same increase as the Big Four nets (which Coen says will hit \$17 billion).

Nevertheless, judging from the praise they heap on cable, expect planners and buyers to pitch a lot more cable TV plans to their clients next year. "They've reinvented themselves,

figured out how to ingratiate themselves into pop culture with very niche, cheap-to-produce programming," says Caraccioli-Davis about the cable channels. "*Monster Garage* [on TLC], *Queer Eye* [on Bravo], *Joe Schmo* on Spike TV, *Rich Girls* on MTV, *Kid Notorious* on Comedy Central—for some reason, cable continues to hit it out of the park."

Cable definitely has "buzz," agrees Warren, which he finds "rather amazing" considering the medium's relatively low audience totals. And as digital cable expands nationwide, advertisers will jump on new technological opportunities, says Alec Gerster, CEO of Initiative Media Worldwide. Bill Koenigsberg, president of independent Horizon Media, notes that "enormous sums of money are being spent on program development, and eventually that is going to pay off for both the cable networks and the advertisers." (On the flip side, Koenigsberg was the only media exec

to single out radio as a medium that will lose ground, because of its "inability to break through in any meaningful way.")

Media execs say product placement, or the marriage of content and commerce by any other name, will mature next year. "All this attention has added to clients' enthusiasm for branded entertainment," says Caraccioli-Davis. "Of course, now that they are enthused, they're asking for ROI."

"We are all learning how to do it smarter and better," says Goldstein, whose agency earlier this month negotiated a deal to develop content with ABC, not strictly a branded-entertainment deal but another aspect of the new relationship between storytellers and sellers. "I think there's a bigger issue here as it relates to media and marketing ROI."

That means more attempts to create measurement devices that go beyond the data provided by the product placement firms, which show where a product appeared and how it was used but not whether its appearance in a TV show or movie actually motivated viewers. The recent launch of Intermedia Advertising Group's product placement service and the upcoming debut of a similar service from Nielsen are good beginnings, media execs say, but in '04, the field will get more sophisticated. One exec predicts several agencies

will develop proprietary measuring software.

Looking at their new-business prospects, media execs say signs are good for an active year. Several predict more media planning reviews in particular. Tucker predicts that "clients are looking harder at the strength of agencies' strategic work and media planning, and will get the best out of that area. It's an area more and more clients are going to look at."

Giant media-consolidation reviews reappeared in the media picture late in 2003, and executives say big-budget free-for-alls have not run their course. "Consolidations will continue," says MPG's Marks. "It's the underlying business trend of the decade. There are only [a few] credible agency holding companies, three or four retailers and around six global media conglomerates...Clients are going to have to get over the conflict issue. They can do it with the Big 5 consulting firms—why not advertising?" ■

**"There are only [a few] credible agency holding companies, three or four retailers and around six global media conglomerates. Clients are going to have to get over the conflict issue."**

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## RADIO

# Radio Execs See Ray of Light After Dark Ad Sales Months

BY KATY BACHMAN

**F**or the first time in months, radio executives have smiles on their faces. In the last two weeks, the local radio ad market, which had been soft for most of the year, is finally picking up. "Local is definitely coming back. December is moving nicely and January is even better," said Lew Dickey, CEO of Cumulus Media.

The change in market conditions couldn't come too soon for radio, which depends on local advertising for 80 percent of its revenue. "I was ready in August to flip over to 2004," said John Hogan, CEO of Clear Channel Radio, who added that one of the

positive signs was the longer lead time between bookings and air dates. "There is a lot of activity in the funnel, and we have more business on the books for first quarter than we did last year."

As a result of recent activity and strong pacing for January and February, several pundits are raising earlier forecasts. Jim Boyle, managing director for Wachovia Securities, who called earlier Wall Street forecasts of 6 percent "too cautious," is estimating radio revenue will grow 8.3 percent in 2004.

That forecast puts radio more in line with local spot TV revenue projections of 10 percent to 11 percent growth, according to the

Television Bureau of Advertising. Because of the boost of dollars expected next year from political, TV groups at last week's analyst conferences unanimously characterized 2004 as a strong one for all broadcasters.

Along with local advertising, radio should again enjoy healthy gains in national spot. The one positive sector in 2003, national spot stalled in November but is expected to be strong next year. Both rep firm heads—Ralph Guild, chairman of Interep, and Stu Olds, president of Katz Media—forecast national spot to be up 8 percent, driven by growth categories including automotive, airlines, computers and software, Internet, telecommunications and the broadcast networks, cable and other entertainment sectors.

Network radio, which is deep into its upfront selling season for 2004—during which 35 percent to 45 percent of business gets booked—has been particularly busy. "Advertisers are a little more optimistic than last year," said Roby Wiener, executive vp of marketing for Premiere Radio Networks. "Pricing is realistic and we're negotiating some increases."

Even though network radio media buyers aren't gushing like the networks, they said that conditions are favorable (price increases under 5 percent) for clients who want to get ahead of a possibly tight scatter market next year. "No network can afford to be overly bullish, so that makes it a good time for clients to get their schedules in," said Natalie Swed Stone, director of national radio for OMD.

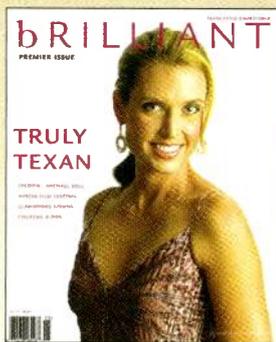
According to the networks, about 10 percent more accounts are placing in the upfront. "A lot of deals are agreed to in principle, but the dust won't settle until the first couple of weeks in January," said Peter Kosann, president of sales for Westwood One.

Despite the warmer sales climate, radio executives are mindful that they need to do more than just write business. "We need to go on the offense. We are stuck in a pre-regulation paradigm playing an inside game, fighting for share with each other. We do a lousy job of competing with other media. We play a lousy outside game," said David Field, CEO of Entercom Communications.

And things can change in a heartbeat. "Radio budgets tend to be flexible and a lot of spending depends on results of the prior campaign, even if inventory is already bought," noted Aaron Cohen, executive vp and director of national broadcast for Horizon Media. ■

## AUSTIN, TEXAS MAGAZINES

### Lone Star State Gets *Brilliant*



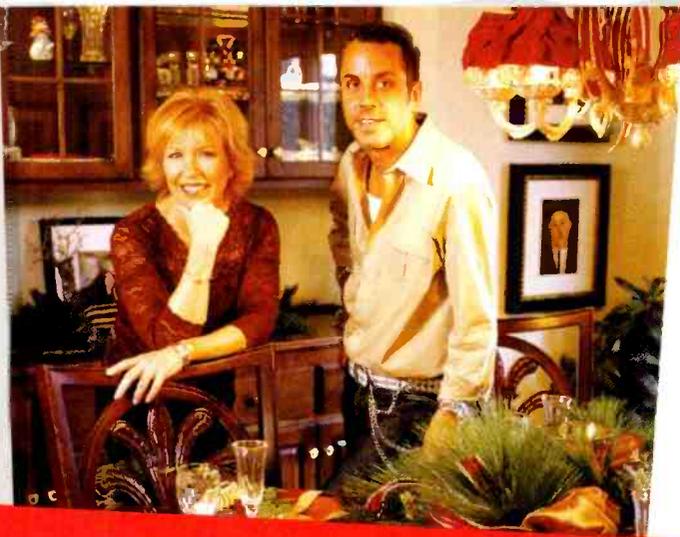
The monthly signed up Paul Mitchell, Saks for January.

As the third coast's answer to New York's *Gotham* and Los Angeles *Confidential* magazines, Texas' stylemakers and society players now have *Brilliant* magazine. The oversized glossy, which premiered with its January issue Dec. 2, covers luxury lifestyle, fashion, art and entertainment in Texas.

Co-founders and publishers Lance Morgan and Phillip Hudson have extensive experience in advertising, public relations and magazine publishing. Last July, they decided to create a statewide title that mirrored their favorite books such as Hearst Magazines' *Town and Country* and American Express Publishing's *Departures*. "We noticed that here in Texas, luxury advertisers and shoppers are spending money," explained Hudson. The Austin-based monthly is published by Brilliance Media and is privately funded.

The first issue covers the state's bustling film industry with an Austin Film Festival feature and a profile of Texan Catherine Hardwicke, director of this year's indie hit *Thirteen*. Of its 50,000 initial circulation, distribution is focused in the state's five largest cities: Dallas, Houston, Fort Worth, San Antonio and Austin. In those cities, 30,000 copies are available on newsstands for \$5.99. (Subscriptions are \$39 a year.) The remaining 20,000 are free through controlled circ—10,000 to upscale restaurants, hotels, spas and retailers, and 10,000 to high-income households.

Advertisers in the first issue include Paul Mitchell, Saks Fifth Avenue and regional high-end retail and real estate. One full page, four-color ad costs \$7,475. "This is a publication that speaks to the fashion-forward, style-conscious Texan," said Debbie Patire, director of advertising and marketing at Saks Fifth Avenue, which has stores in *Brilliant's* five cities. "Their [editorial] coverage is perfectly aligned with our market." —Aimee Deeken



up 35%!



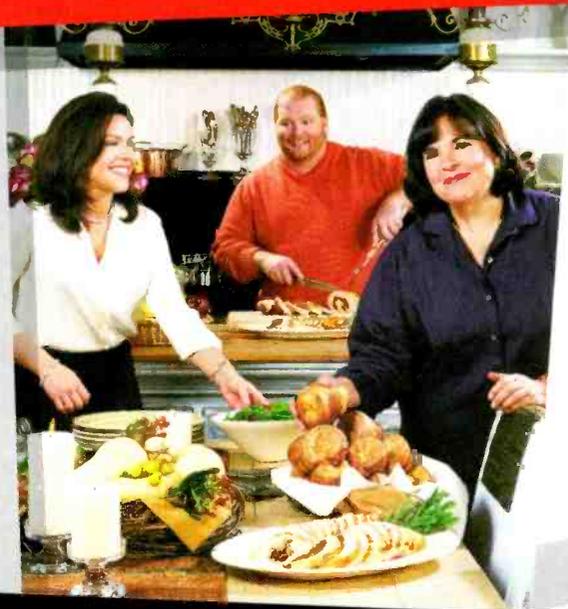
# Holiday cheers for record ratings!

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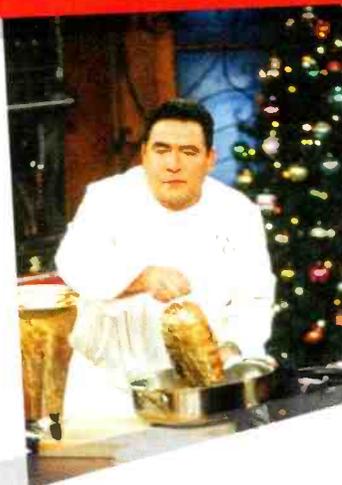
**HGTV and Food Network celebrate their highest Prime ratings ever!**

HGTV recorded a 0.9 HH RTG on average during November 2003, up +35% in average household impressions (736,000) over last year. Food Network delivered its first ever 0.7 HH RTG in November, up +27% in average household impressions (587,000) over 2002.\*

\*Source: Nielsen Media Research, Nov'02 (10/28/02-11/24/02) vs. Nov'03 (10/27/03-11/30/03), M-SU/8-11P prime rotation. HGTV and Food Network percentages reflect household impressions growth. Subject to qualifications upon request.



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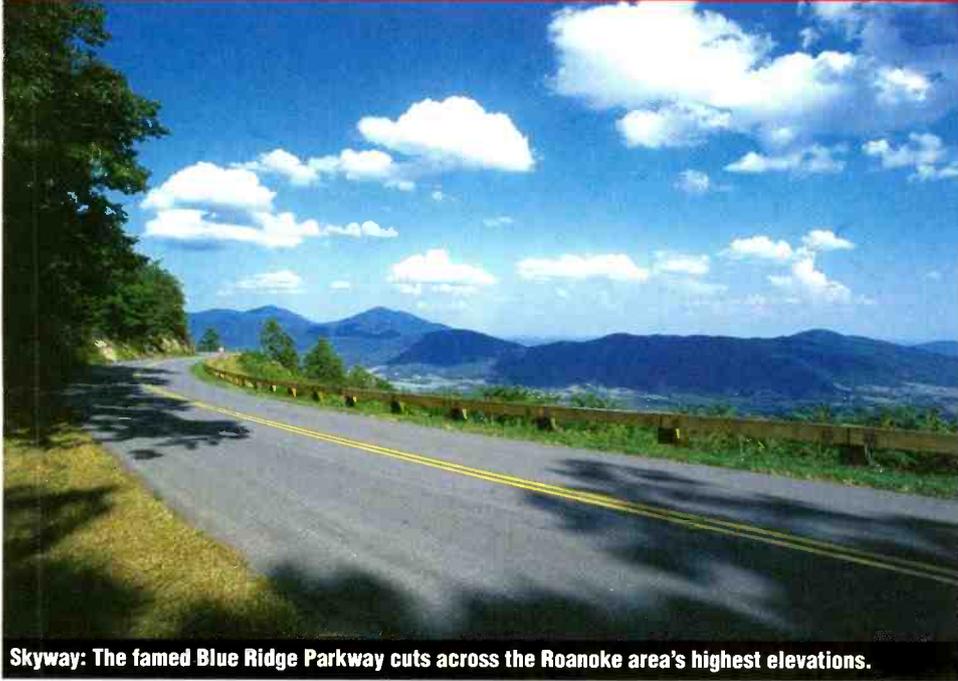
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# market profile

BY EILEEN DAVIS HUDSON



**Skyway:** The famed Blue Ridge Parkway cuts across the Roanoke area's highest elevations.

ROANOKE VALLEY COMMUNITY AND VISITOR BUREAU

## Roanoke, Va.

LOCATED IN SOUTHWESTERN VIRGINIA, THE CITY OF ROANOKE HAS SEVERAL MONIKERS, including the Capital of the Blue Ridge Mountains, which run through the area, splitting the hyphenated Roanoke-Lynchburg market in half. The mountains not only act as a physical divide but also mark many cul-

tural and economic differences between the two cities. Roanoke is more metropolitan, while Lynchburg, located about 50 miles to the east, boasts a small-town charm.

The hub of the Roanoke Valley, Roanoke is also known as the "Festival City," hosting the Roanoke Festival in the Park, Downtown Roanoke's Railway Festival, Vinton's Dogwood Festival and the Virginia Championship Chili Cook-off, among numerous others. Roanoke has also been dubbed by some as the "Star City of the South," after the 100-ft.-high illuminated star constructed of steel and concrete that has sat atop Mill Mountain for more than four decades. Pilots often use the city symbol as a landmark.

Tourist attractions in the area include the Blue Ridge Parkway and Blue Ridge Mountains; Smith Mountain Lake (one of the coun-

ty's largest man-made lakes); an historic outdoor farmers market where the annual chili cook-off is held; and Center in the Square, a multifunctional complex in downtown Roanoke that features museums, a theater and a planetarium.

The Roanoke Valley boasts 19 colleges and universities within a 60-mile radius. Most noted are the University of Virginia in Charlottesville and Virginia Tech, located in the city of Blacksburg in a part of the market called

New River Valley.

With 450,090 TV homes, the Roanoke-Lynchburg television market ranks No. 66 in the country, up one place from a year ago. The market is not metered, so Nielsen uses diaries to survey local TV viewing habits.

Schurz Communications of South Bend, Ind., owns CBS affiliate WDBJ-TV, the long-time market leader. WDBJ delivers more than double the household rating and share for its 6 p.m. news of its two network affiliate competitors. Last April, WDBJ moved into a new digital broadcast facility near Roanoke Regional Airport.

WSLS-TV, Media General's NBC affiliate, the No. 2 station in the market, welcomed new vp/general manager Kathy Mohn Aug. 11. Mohn formerly ran KWCH, Media General's CBS outlet in Wichita, Kan. The station also promoted its medical reporter Karen McNew to lead female anchor at 5, 6 and 11 p.m. (the Blacksburg native continues to head the station's On Your Side health team).

Mohn says that with a hyphenated market, "the challenge is to do a thorough and complete newscast that gives you good local information for Roanoke, as well as pertinent information for the region." She says it helps that WSLS has a news bureau in New River Valley and shares news with its sister Media General properties in Lynchburg and Danville, Va.

On Dec. 4, WSLS launched the market's first Real Time Viper Radar, which provides real-time weather data instead of the typical 10-minute delay. "In severe weather, five to 10 minutes can make a big difference," says Mohn.

WSLS has a joint sales agreement with local Pax outlet WPXR-TV.

WSLS has been producing a half-hour 10 p.m. newscast for Grant Communications' Fox affiliate WFXR-TV, which was expanded to an hour in August (it continues to produce a half-hour news on weekends). (Grant also owns WFXR's sister translator station in Lynchburg, WJPR.) WFXR carries WB programming in the area via cable. WFXR in November welcomed new station manager David Bunnell, who had been director of sales at Viacom's UPN affiliate in Norfolk, Va.

Allbritton Communications' ABC affiliate WSET-TV is the market's only TV outlet located in Lynchburg, and many of its viewers

### NIelsen MONITOR-PLUS AD SPENDING BY MEDIA / ROANOKE, VA.

	Jan.-Dec. 2001	Jan.-Dec. 2002
Spot TV	\$54,085,843	\$47,494,862
Outdoor	\$4,656,420	\$4,611,800
Total	\$58,742,263	\$52,106,662

Source: Nielsen Monitor-Plus



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ABC 7 News 5:30am	2/13	#1
ABC 7 News 6:00am	4/15	#1
Good Morning America	5/16	#1
The Oprah Winfrey Show	8/26	#1
The View	5/17	#1
ABC 7 News 11:00am	5/16	#1
ABC Network Daytime (12n-3p)	5/14	#1
Inside Edition	5/13	#1
Jeopardy	7/16	#1
ABC 7 News 4:00pm	7/16	#1
ABC 7 News 5:00pm	9/18	#1
ABC World News Tonight	9/17	#1
ABC 7 News 6:00pm	8/16	#1
Wheel of Fortune	11/20	#1
ABC 7 News 10:00pm (T-F)	11/17	#1
ABC 7 News 10:00 pm (T-Su)	10/16	#1
Nightline	7/13	#1

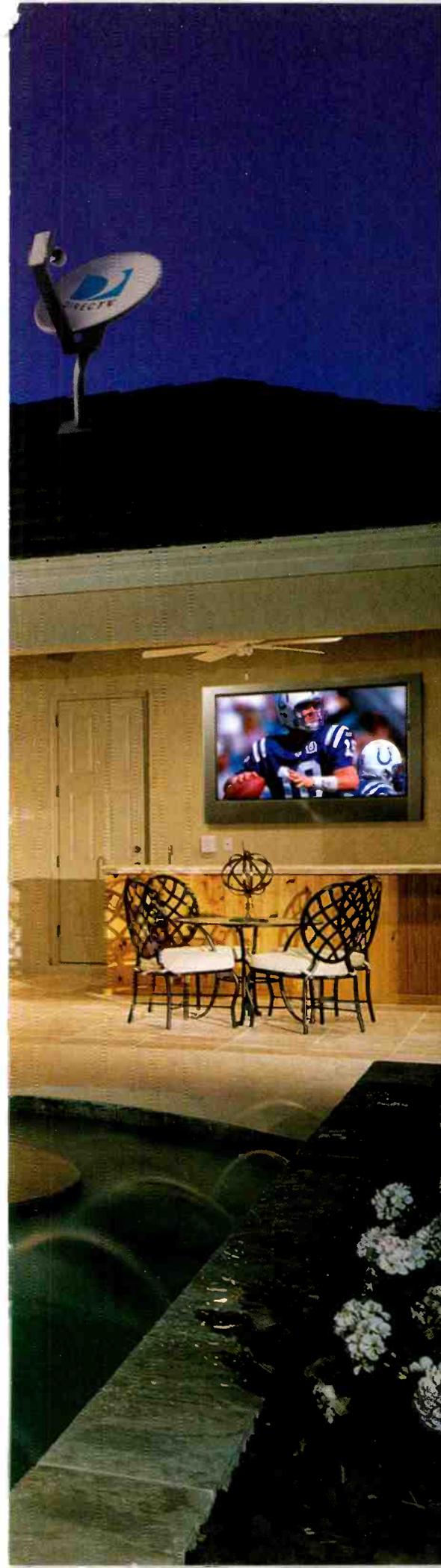
**7AM - 1AM**

**6/13**

**#1**



Source: DIRECTV income: Based on a random sample of surveyed DIRECTV customers 10/03. 15M subs. DIRECTV, Inc. 2003 subscriber count. Qualifications available upon request.  
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# DIRECTV *measures-up...*

## *Delivering...*

television's most affluent viewer with  
a median household income of \$65,200.

## *Reaching...*

12 million tech savvy subscribers.

## *Offering...*

advertising opportunities on nearly  
70 general entertainment networks and  
in virtually every major league sport.

## *And now, providing...*

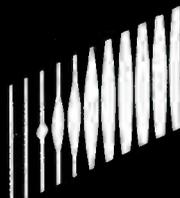
proof of performance with an all new monthly  
**NIELSEN MEDIA RESEARCH POCKETPIECE!**



Nielsen  
Media Research

*As America's #1 Digital Satellite Provider...  
DIRECTV Delivers Television's Most Upscale Viewer.*

Exclusively represented  
for advertiser sales by:



**SONY**  
PICTURES  
TELEVISION



**DIRECTV**

# market profile

pick up its broadcasts via cable or satellite. The station does not produce a 5 p.m. newscast, instead running *The Oprah Winfrey Show*, followed by local news at 6 p.m. Randy Smith,

WSET president/gm, also says the station introduced new music this year and changed its morning lineup to add a double run of *Judge Judy* at 9:30 and 10:30 a.m.

UPN affiliate WDRL-TV, locally owned by Danville TV Partnership, has completely revamped its 5-8 p.m. lineup. Station manager Lon Mirolli says WDRL is trying more ethnic programming in the time period, including *A Different World* and *Judge Hatchett*, which replace shows like *Extra* and *Mama's Family*. While WDRL has no news, it does produce some high school and college football and basketball games.

## SCARBOROUGH PROFILE

### Comparison of Roanoke, Va.

TO THE TOP 50 MARKET AVERAGE

	Top 50 Market Average %	Roanoke, Va. Composition %	Roanoke, Va. Index
<b>DEMOGRAPHICS</b>			
Age 18-34	31	29	92
Age 35-54	40	38	96
Age 55+	29	33	115
HHI \$75,000+	30	16	53
College Graduate	13	9	74
Any Postgraduate Work	11	7	63
Professional/Managerial	23	17	74
African American	13	15	114
Hispanic	14	#	#
<b>MEDIA USAGE-AVERAGE AUDIENCES*</b>			
Read Any Daily Newspaper	54	56	103
Read Any Sunday Newspaper	63	67	106
Total Radio Morning Drive M-F	22	19	87
Total Radio Afternoon Drive M-F	18	16	86
Total TV Early News M-F	29	26	92
Total TV Prime Time M-Sun	39	36	92
Total Cable Prime Time M-Sun	14	18	127
<b>MEDIA USAGE-OTHER</b>			
Accessed Internet Past 30 Days	60	56	93
<b>HOME TECHNOLOGY</b>			
Owns a Personal Computer	68	60	87
Purchase Using Internet Past 12 Months	41	36	87
HH Connected to Cable	67	61	91
HH Connected to Satellite/Microwave Dish	18	28	154
HH Uses Broadband Internet Connection	16	10	58

#Respondent level is too low to report. \*Media Audiences-Average: average issue readers for newspapers; average quarter-hour listeners within a specific daypart for radio; average half-hour viewers within a specific daypart for TV and cable. Source: 2003 Scarborough Research Top 50 Market Report (February 2002 - March 2003)

## NIELSEN RATINGS / ROANOKE, VA.

EVENING AND LATE-NEWS DAYPARTS, WEEKDAYS

### Evening News

Time	Network	Station	Rating	Share
5-5:30 p.m.	CBS	WDBJ	9	27
	NBC	WSLS	5	14
6-6:30 p.m.	CBS	WDBJ	15	31
	NBC	WSLS	7	16
	ABC	WSET	6	13

### Late News

10-10:30 p.m.	Fox	WFXR#	4	8
11-11:30 p.m.	CBS	WDBJ	8	25
	NBC	WSLS	6	18
	ABC	WSET	3	9

#Represents audience estimates shown for parent station plus satellites/affiliates. All data estimated by Nielsen from diary returns of evening and late local news only. Source: Nielsen Media Research, July 2003.

Adelphia Communications is the dominant cable provider. Its ad sales arm, Adelphia Media Services, inserts on 24 networks. Cox Communications serves Roanoke County, and Charter Communications is in the Bedford, Smith Mountain Lake area in the southern part of the market. Oddly, the mountainous topography does not help cable penetration in the market (see *Scarborough chart on this page*), but it may have something to do with the higher-than-average satellite service penetration.

Norfolk, Va.-based Landmark Communications' *The Roanoke Times* is the largest metropolitan daily in the market. The paper's daily circulation as of Sept. 30 was 99,970, flat compared to the period ended Sept. 30, 2002, according to the Audit Bureau of Circulations. The paper's Sunday circ of 111,591 represents a fractional decline year-over-year.

Earlier this year, the *Times* completed construction of its new \$31.6 million print facility, which houses a new press in a 70,000-sq.-ft. building. The press portion is 47,000-sq.-ft. and features a 70-foot ceiling and a glass-and-brick front that allows passersby to see the press in action.

The new facility is linked to the paper's offices via a walkway. The press, which started daily printings on Oct. 27, is a Heidelberg Mainstream 80, the first such press to be installed in the U.S., according to the paper.

The *Times* launched a major redesign of the paper simultaneously with the launch of the new press in October. The redesign, the paper's first major revamp since 1997, included the conversion to a 50-inch web width. Among other changes, the paper now features color-coded classifieds; a standalone sports section seven days a week; a new weather column; a transportation column; a daily photo essay; a column in Spanish; a revamped regional stocks listing; and a directory of useful Internet sites.

*The News & Advance* of Lynchburg, owned by Media General, is the smaller of the area's two main dailies. The *N&A's* daily circulation as of Sept. 30 was 37,136, while its Sunday circ was 42,734, both flat year-over-year.

The *N&A* has made a few changes to its

## NEWSPAPERS: THE ABCs

pages in the past year, much of them guided by reader feedback. A new fine-arts page, for instance. *N&A* managing editor Joe Stinnett says the paper had initially planned to do something that would appeal to younger readers. But after doing some research, the paper determined that its readers enjoy its fine-arts coverage, so it has added in its Thursday features section a dedicated page with coverage of such popular entities as the local theaters, museums and the symphony orchestra.

The paper also redesigned and expanded its sports section in the spring. The section now features an expanded scoreboard feature anchored on page 2. The daily comics/entertainment pages have also grown, with seven new comic strips added this fall. The paper now runs 21 comic strips daily (except Sunday). Stinnett says the *N&A* also spruced up its graphics in an effort to make them more contemporary. Media General also owns two other dailies in the market, the *Progress* in Charlottesville and the *Danville Register & Bee*.

Other local publications include the biweekly *Blue Ridge Business Journal*, owned by the *Roanoke Times*. The *Journal*, now celebrating its 15th anniversary, covers business news throughout the region. *Roanoker Magazine*, a lifestyle title serving the Roanoke Valley area, has been around for 29 years and is published bimonthly by Leisure Publishing Co. *City Magazine*, a free monthly leisure guide, is distributed at locations such as visitor centers, hotels and colleges.

The Roanoke-Lynchburg radio market ranks No. 110 in the country. Arbitron measures the market twice a year, in the fall and spring. Clear Channel Communications and Mel Wheeler Inc. are by far the leading players, commanding a commanding 88.9 percent of the radio ad dollars between them (see chart on this page).

Clear Channel's WJLM-FM, which had been a Country outlet for at least 15 years, switched to all-Christmas music in December 2002 then flipped to Soft Adult Contemporary under the new call letters WSNV-FM. The format change seems to have helped the station, which now calls itself Sunny 93. WSNV has seen its average quarter-hour share improve steadily over the past several books. The station pulled a 2.5 among listeners 12-plus in the spring 2002 book, a 3.2 in the fall 2002 book and a 4.4 in the most recent spring 2003 book. The station's morning show ranked sixth in the market in the spring book.

WSNV had been competing against sister Country outlet WYYD-FM, which has a much stronger signal, and Mel Wheeler's WSLC-

	Daily Circulation	Sunday Circulation	Daily Market Penetration	Sunday Market Penetration
<b>Roanoke City: 41,239 Households</b>				
<i>The Roanoke Times</i>	23,961	25,837	56.7%	61.2%
<b>Roanoke County: 35,590 Households</b>				
<i>The Roanoke Times</i>	15,648	17,548	44.0%	49.3%
<b>Lynchburg City: 25,411 Households</b>				
<i>The (Lynchburg) News &amp; Advance</i>	15,403	16,729	60.6%	65.8%
<b>Bedford County: 24,635 Households</b>				
<i>The Roanoke Times</i>	4,338	5,486	17.2%	21.8%
<i>The (Lynchburg) News &amp; Advance</i>	4,159	4,864	17.1%	20.0%
<b>Danville City: 20,030 Households</b>				
<i>Danville Register &amp; Bee</i>	13,899	15,935	69.4%	79.6%
<b>Botetourt County: 12,206 Households</b>				
<i>The Roanoke Times</i>	4,963	5,980	40.7%	49.0%
<b>Amherst County: 11,787 Households</b>				
<i>The (Lynchburg) News &amp; Advance</i>	5,087	5,963	43.2%	50.6%
<b>Salem City: 10,105 Households</b>				
<i>The Roanoke Times</i>	7,902	8,500	78.2%	84.1%
<b>Bedford City: 2,495 Households</b>				
<i>The (Lynchburg) News &amp; Advance</i>	1,079	1,358	43.2%	54.4%

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

## ARBITRON RADIO OWNERSHIP

Owner	Stations	Avg. Qtr.-Hour Share	Revenue (in millions)	Share of Total
Clear Channel Communications	2 AM, 7 FM	31.6	\$10.2	47.1%
Mel Wheeler Inc.	2 AM, 4 FM	33.0	\$9.0	41.8%
Travis Broadcasting	2 FM	2.8	\$1.0	4.7%
Burns Media Strategies	1 FM	1.8	\$0.5	2.1%
Ward Broadcasting	1 AM	0.5	\$0.4	1.9%

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

FM. WYYD is also a heritage Country station and has often been the leading station overall.

Leonard Wheeler, president of Mel Wheeler Inc. and gm of its radio cluster in Roanoke, says WSLC has been on an upward trend since going Country three years ago, arguing that that progress "motivated WJLM to leave the Country format." While WSLC had been improving in the ratings, Wheeler adds, the station "definitely had the benefit" of one less direct competitor. In the spring Arbitrons, WSLC soared to a 12.2 from a 7.6 in fall 2002, topping the market's overall 12-plus numbers. CC's WYYD saw modest growth, going from a 6.9 in the fall to a 7.4 in the spring.

Last May, Mel Wheeler's dominant News/Talk WFIR-AM hired Clay Young as its new news director/morning anchor. Young previously worked at CKPR-AM/TV in Thun-

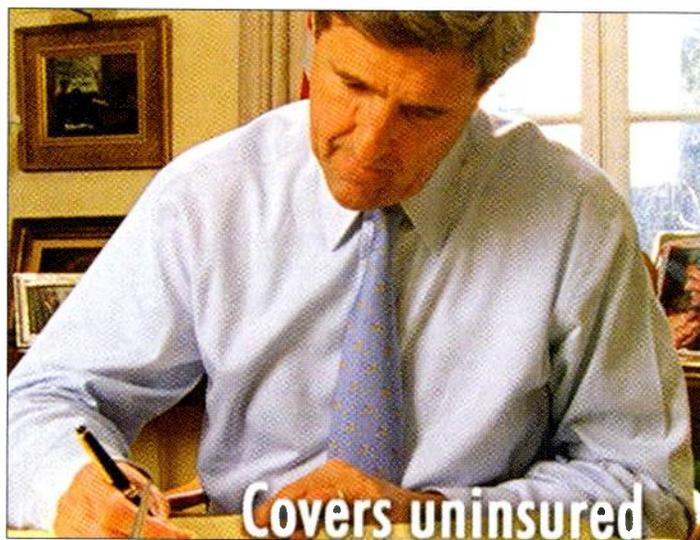
der Bay, Ontario, in Canada.

Among the smaller broadcasters are Travis Broadcasting, which owns Oldies WZZU-FM and Modern Rock station WZZI-FM. Burns Media Strategies owns the only FM Talk outlet, WLNI. Hubbards Ad Agency owns Gospel WLLI-AM, which competes with Word Broadcasting's Urban Gospel WTOY-AM.

In outdoor advertising, Lamar Advertising and Viacom Outdoor are the two largest players, although a few independent outdoor companies also compete locally. While Viacom and the independents offer bulletins only, Lamar is the sole company in the market offering 30-sheet posters. Lamar offers about 700 poster faces out of a total inventory of about 1,100 faces throughout Roanoke-New River Valley-Lynchburg. The main arteries in the market include I-81, I-581 and US 460. ■

**For Lyndon Johnson,** it was “Daisy.” For Ronald Reagan, it was “Morning in America.” For George H.W. Bush, it was “Willie Horton.” In a presidential election year, when roughly half of all citizens old enough to vote turn up at the polls to choose America’s next leader, political advertising jams the airwaves. As Election Day approaches, the dull roar becomes a numbing crush. But sometimes one ad stands out—one that is striking, memorable or provocative enough to define the race, to change the course of the contest and even alter the outcome.

No one knows what the breakthrough ad will be in 2004, or even if there will be one. But already it seems clear that voters will be subjected to an unprecedented barrage of political ads. More than 4,000 have aired in Des Moines, Iowa, alone since January, compared with fewer than 900 at a similar point in the 2000 presidential race, and candidates have already spent an estimated \$8 million-plus nationwide, according to the University of Wisconsin Advertising Project. The bulk of the spending is in the early decision states of Iowa and New Hampshire, but ads are up (or plans for them have been announced) in states such as South Carolina, Texas, New Mexico and Oklahoma. “Not only are we



# BREAKING THE

seeing an influx of early and heavy advertising overall, we are seeing significantly more advertising than in 2000, when we had two quite competitive nominating contests,” says Ken Goldstein, associate professor of political science at the University of Wisconsin at Madison.

The early start lends weight to expectations that 2004 will be at least as rich in ad spending as 2000, which set a record for a presidential race. Some predict 2004 will match or exceed the overall record for political ad spending of an estimated \$1 billion set in 2002, when big states including New York, California and Texas held competitive, expensive gubernatorial and U.S. Senate races.

Prognosticators say those expectations will bear out, despite the U.S. Supreme Court’s decision last week to uphold key features of the Bipartisan Campaign Reform Act of 2002, more commonly known as McCain-Feingold after its sponsors, Sen. John McCain (R-Ariz.) and Sen. Russ Feingold (D-Wis.). Political candidates and groups already are proving adroit at fundraising that complies with the law’s complex provisions. “Political advertising is here to stay, campaign finance reform or not,” says Evan Tracey, COO of TNS Media Intelligence’s Campaign Media Analysis Group. McCain-Feingold keeps political parties from accepting large, anonymous donations. Nevertheless, says Tracey, “It’s hard to believe that money leaves the process.”

The strategies are beginning to crystallize for President Bush’s re-election campaign and the various Democratic challengers. Based on the first Republican National Committee ad, which aired Nov. 23, Bush’s creative strategy seems likely to focus on themes such as strength and moral clarity, exemplified by the war in Iraq and the fight against terrorism. The 30-second spot shows footage of Bush delivering the

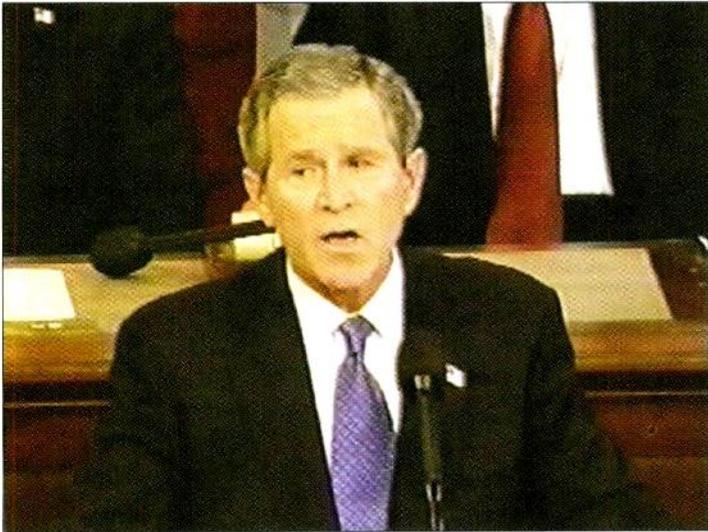
**DUKING IT OUT** Democratic hopeful John Kerry (above left) is parading his status as a war veteran as well as his experience in foreign affairs in a recent ad to contrast one of the RNC’s first ads promoting President Bush’s (right) tough stance on terrorism.

State of the Union address before Congress last January. The words “strong and principled leadership” appear onscreen. A voiceover says, “Some call for us to retreat, putting our national security in the hands of others.” The spot then calls on viewers to tell Congress “to support the president’s policy of preemptive self-defense.”

The Democrats are running issue ads to distinguish themselves from one another, but they are also attacking Bush. After the RNC’s spot broke, Howard Dean, the former Vermont governor, launched an immediate Internet appeal to fund a reply. An ad was on the air the following day, countering what it called the RNC’s “first attempt to define and distort the upcoming election.” Earlier, Dean launched his first TV ads in Iowa in June, adding New Hampshire in August and buying radio spots in South Carolina in September.

Attacking Bush on Iraq has given Sen. John Kerry (D-Mass.) the chance to contrast his military and foreign affairs experience with Bush’s. Kerry’s 30-second “Carrier” spot, which broke in Iowa and New Hampshire on Nov. 11, uses footage of Bush’s appearance in May on the U.S.S. Abraham Lincoln under a banner that read, “Mission Accomplished.” A voiceover says, “Who can take on George Bush and change the direction of the nation? John Kerry. A leader on national security. A decorated combat veteran.”

“Bush’s swagger across the deck communicates the folly of this



**Some are now attacking the President for attacking the terrorists.**

# BANK

**Ad spending records are expected to be shattered as the presidential hopefuls build their war chests and assemble their strategy teams** BY TODD SHIELDS

administration's policy," says Jim Margolis, a senior partner at GMMB in Washington, D.C. and a top Kerry media aide. "The mission is not accomplished in Iraq or on healthcare or on 'leave no child behind' in terms of education. In the ad, viewers see John Kerry, who not only has a history in terms of experience and foreign policy but also comes off as someone who can go toe-to-toe with George Bush."

In the race for the Democratic nomination, Iowa reflects the emerging trends. Political ads began airing in the state in the summer and, after some fits and starts, have been a continual presence since early November, says Dan Lyons, general sales manager for WHO-TV in Des Moines, an NBC affiliate owned by The New York Times Co. Four Democrats—Dean, Kerry, Rep. Richard Gephardt (D-Mo.) and Sen. John Edwards (D-N.C.)—have dominated spending and airtime, with Dean even buying 30-minute blocks to air a biographical ad. Lyons says his calculations indicate TV ad spending will run about 20 percent ahead of the total for the caucus season four years ago. "What you're seeing is people spending money on their issues, instead of attacking," says Lyons.

One provision of McCain-Feingold mandates that candidates appear onscreen during an ad to say they have approved the message—a requirement that slices three to four seconds off a 30-second spot. And it imparts another kind of burden, too. "By putting that candidate's name and face to that message, it's got to be presented in an upstanding way," says Vinnie Minchillo, creative director for Scott Howell & Co., a Dallas political ad firm that helped candidates win three Senate races in 2002.

To fund the ads, the campaign war chests continue to grow on both sides. Bush was first to reject matching federal funds for the primaries—a stance that frees him from a spending limit of \$45 million. With a well-

organized cadre of donors and a busy speaking schedule, Bush crossed the \$100 million mark in fundraising in mid-November with a trip to Florida. He is on track to raise \$170 to \$200 million, all for a primary season in which he faces no Republican challenger. After the major party conventions in August, Bush and his opponent are each expected to accept \$70 million in public funds for the two-month sprint to Election Day.

A sustained blitz of ads is expected to begin sometime in the spring, once the Democratic nominee is known. Bush will bankroll months of advertising that is expected to focus on his opponent's weaknesses as much as his own strengths. Veteran campaign observer Ron Faucheux, editor in chief of *Campaigns & Elections* magazine, has said that he envisions Bush launching a \$30-million, three-week flight of ads after the Democrats pick their nominee, "built around unflattering quotes from Democrats about their party's standard-bearer."

The prospect of such ad blitzes has energized Democrats and their allies. According to candidates' filings with the Federal Election Commission, Dean had raised roughly \$25 million by the end of September, an impressive total for a grassroots, Internet-driven effort but far short of the Bush juggernaut. The disparity does not escape Dean. In a message to supporters, he said that limiting his campaign to matching funds "will hinder our reform efforts...giving the Bush campaign a spending advantage of \$170 million, which they will use to define and distort us from March to August." It was no surprise last month when Dean decided to forego public financing. Within days, Kerry decided that he, too, would forego public financing.

Democratic-leaning groups are also moving into the field.

MoveOn.org, an Internet-based group with a staff of seven employees who work out of their homes and a mailing list of 1.7 million, says it plans to spend \$10 million in an attempt to define Bush. "It'll go to running ads in swing states," says Eli Pariser, international campaigns director for the group. MoveOn.org counts among its backers financier George Soros, who has pledged up to \$5 million for the ad campaign.

Such largesse worries RNC chairman Ed Gillespie. In a letter to Dean, he noted that "special interest groups like the Sierra Club, the AFL-CIO, the Association of Trial Lawyers of America, MoveOn.org and America Coming Together, the group founded by billionaire George Soros, are raising up to \$421 million to spend on the presidential election next year." Gillespie challenged Dean to ask the groups to disclose all funding sources and amounts, noting that unlike party-affiliated groups, the independent organizations are not bound by donation limits set by McCain-Feingold, such as that law's \$2,000 limit for individual contributions to presidential campaigns. The Democratic National Committee shot back that GOP-leaning groups are readying "plans to dump tens of millions of dollars into Bush's re-election effort."

The independent groups are gaining in prominence in part because of the passage of McCain-Feingold in 2002. The legislation was meant to lessen the influence of so-called "soft money"—large, undisclosed contributions to political parties from corporate or union treasuries that accounted for more than \$450 million in spending in 2000. McCain-Feingold acts in two major ways: It bars political parties from accepting such donations, and it forbids independent groups (which may accept large donations) from airing so-called "issue ads" 30 days before primaries and 60 days before general elections. In recent elections, such ads have aired frequently, avoiding federal restrictions by averting the use of terms such as "vote for" or "vote against" while still influencing voters.

The Supreme Court upheld both key features of McCain-Feingold last week, so organizations such as the major parties' senatorial and congressional campaign committees, which spent heavily in 2000, could play lesser roles this election cycle. Meanwhile, independent groups and the campaigns themselves become the major players. "The dollars are still going to be there," says John Brabender, co-founder of BrabenderCox, a political ad agency in Pittsburgh. "Just the direction they're coming from has changed a little bit."

If the money is coming from new directions, it will likely flow to the same places: the key primary states first; then, during the general election campaign, to the states that were closely contested in 2000. For the primaries, that means the run-up to the Jan. 19 caucuses in Iowa and the Jan. 27 voting in New Hampshire, with outlays soon to follow in South Carolina, Oklahoma, Washington, Michigan and other states. Primary season, which once stretched through June, could effectively be over by March 2, the date of the Super Tuesday set of primaries that may prove decisive. States going to the polls that day—and that could take in advertising in the run-up—include California, Georgia, New York and Ohio.

For the general election, spending patterns will follow dynamics imparted by the Electoral College, with each campaign seeking to tip hotly contested states into their column. "All the close states—that's where you'll see the money go. And the others will be ignored," says Paul Herrnson, director of the Center for American

Politics and Citizenship at the University of Maryland.

The logic is ironclad: Campaigns won't spend money to persuade voters who are already on their side. New Jersey, for example, can expect little spending since it is considered an increasingly reliable Democratic state. At the same time, some New Jersey TV viewers may see ad flights on Philadelphia stations aimed at voters in Pennsylvania, which is considered to be in play.

Pennsylvania figures high on many short lists of big states that will be hotly contested, and so could be deluged with ad dollars. Campaigns will choose their ad buys after extensive polling, in response to the race's evolving dynamics. But already it seems clear that ad dollars will flow to states that gave Bush or Gore margins of less than 6 percent in 2000. These include Arizona, Michigan, Ohio, Oregon, Pennsylvania, Tennessee, Washington and Wisconsin.

Florida, too, belongs in this group, but it may be in a class of its own next year. Democratic senator Bob Graham has decided not to run for a fourth term, creating what is expected to be a wide-open race. Memories of the Florida recount in 2000 will leave both parties especially eager to seize the electoral vote there. Republicans are already nervous because Katherine Harris, who played such a public role in the recount as Florida's secretary of state (and who is now a Republican congresswoman), has expressed interest in Graham's seat. Her campaign, some Republicans fear, could stir up bitter memories of the contested 2000 election and drive Florida Democrats to the polls in record numbers.

Freshman Sen. Peter Fitzgerald (R-Ill.), who spent \$14 million to unseat a Democrat, Carol Moseley Braun, is also not standing for re-election. Ads from a broad field of possible successors have been on the air in Illinois since June.

To craft their messages, all of the presidential contenders are relying mainly on veterans from previous national races. The official Bush campaign, Bush-Cheney '04, appears ready to return to its media strategizing roots. In May, the campaign named Matthew Dowd as director of polling and media planning. Dowd is president and founding partner of Austin, Texas-based Public Strategies Inc., a public affairs firm that handled Bush's advertising in 2000 along with Maverick Media, also in Austin. Dowd declined requests for an interview.

Sources said that Dowd and the campaign tapped Bush veteran Mark McKinnon as media/advertising director to run the ad campaign day to day. Joining him will be Harold Kaplan, a creative director at New York agency Young & Rubicam, and Hispanic-ad specialist Lionel Sosa, who founded what is now Bromley Communications in San Antonio and also ran Garcia LKS. Kaplan and Sosa were on Bush's media team in 2000.

Among the Democrats, Dean's top man is strategist Joe Trippi of Trippi, McMahon & Squier, known for hard-hitting ads. In addition to Margolis, whose resumé includes Walter Mondale's presidential bid in 1984, Kerry is working with Bob Shrum. Known as a powerful speech writer, Shrum advised Al Gore in the 2000 race.

Gephardt has re-hired his 1988 presidential campaign consultant Bill Carrick of Morris Carrick & Guma/Murphy Putnam Media. Edwards has enlisted David Axelrod of Chicago-based Axelrod & Associates, who worked on Bill Clinton's 1992 campaign. Sen. Joe Lieberman (D-Conn.) has retained Mandy Grunwald and Mark Penn, who formed the firm Integrity Minded Media. And Wesley Clark has hired Democratic media consulting firm Joe Slade White.

Whatever the candidates' ad messages turn out to be, one thing is clear: There will be no shortage of them. —with Wendy Melillo ■

**"What you're seeing is people spending money on their issues, instead of attacking."**

**WHO-TV'S LYONS**

The **movie network**  
equivalent of  
**HUGE** BOX OFFICE NUMBERS.

Up 35% in prime HH rating\*

Up 28% in prime delivery of A18-49 and A25-54\*\*

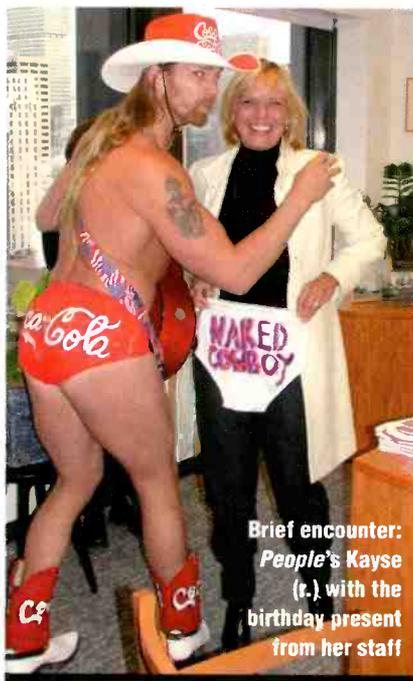


Our best November ever.\*

TV FOR MOVIE PEOPLE

### Quicktakes

**SEEING HIM IN PRINT** is one thing; seeing him in the flesh (most of it exposed) in the “friendly confines” of your office is quite another, as *People* publisher **Kathy Kayse** learned when her staff sent the Naked Cowboy to serenade their boss for her 45th birthday. Kayse was in a meeting in *People* president Peter Bauer’s office when the larger-than-life Cowboy (né Robert Burck II) walked in wearing only his signature “tighty whiteys,” hat and boots and strumming a birthday ditty on his well-placed guitar. “I didn’t know where to look,” said Kayse, adding that she will repay her staff for the gesture. The Cowboy, a regular performer around Times Square, is featured in *People*’s current trade ad campaign... At the recent *Interior Design Magazine* Hall of Fame Awards held



**Brief encounter:** *People*’s Kayse (r.) with the birthday present from her staff

at the Waldorf, publisher **Mark Strauss** and editor **Cindy Allen** hobnobbed with inductees and guests including *Queer Eye* guy Thom Filicia and New York Mayor Michael Bloomberg. Inductee Jamie Drake, who has designed rooms for the mayor, said that when doing Bloomie’s bedroom, he wanted to “bring together elements of masculine and feminine,” to which the mayor responded, “So do I.”... **Dick Wolf** is having a lousy

month: First his longtime ratings-grabber *Law & Order* on NBC was beaten by a home makeover show, and then he had a run-in with an SUV and couldn’t go to the John A.

Reisenbach Foundation gala last Monday to receive the group’s Distinguished Citizen award (for fostering better understanding of police work through his shows). *L&O* star Jerry Orbach accepted the award in Wolf’s stead, saying, “Besides thanking you, the one thing [Dick] wanted me to tell you was, ‘Cross on the green.’” Wolf suffered minor injuries and was released from a Manhattan hospital early last week... This year **WPIX** will keep the home fires burning—in high-def. The New York WB station will continue its Christmas Day “Yule

Log” tradition—video of a cozy fireplace accompanied by carols—offering it in high-definition and extending its run from 9 a.m. to 1 p.m. That’s two toasty hours longer than last year, when the Log won its time period in ratings... **United Stations Radio Networks** will be spending nights with **Alice Cooper** starting Jan. 26, as the flamboyant rocker gets his first radio gig. Cooper will host a new USRN-syndicated evening show called *Nights With Alice*

*Cooper*, targeting a Classic Rock audience and originating from “a secret location in the Arizona desert,” near Cooper’s home. The show will mix Classic Rock cuts with a cast of characters to be introduced as the show evolves. “It’s a medium that lends itself to great theater right alongside the music,” said Cooper. His latest album, *The Eyes of Alice Cooper*, came out in September and earlier this month he received his star on the Hollywood Walk of Fame. ■



(L. to r.) Drake, Filicia, Bloomberg and Strauss at *ID*’s gala

#### MAGAZINES

At Hearst Magazines’ *Popular Mechanics*, **Jane Wladar** was promoted to associate publisher from advertising director and **Michael Kresch** was upped to executive director/marketing from marketing director... **Peter Janssen** was named editorial director overseeing Time4 Media’s *Yachting* and *Motor Boating* magazines. Janssen previously served as editor in chief and publisher of *Motor Boating & Sailing* (now *Motor Boating*) for 18 years and most recently was the editorial director for Hearst Custom Publishing.

#### NETWORK TV

**Jonathan Karl** has joined ABC News as a senior foreign affairs correspondent, where he will cover the State Department and foreign affairs. He moved to ABC from CNN, where he covered Capitol Hill, the White House and the Pentagon.

#### TV STATIONS

**Bram Watkins** was named general manager of El Paso, Texas, CBS affiliate KDBC-TV, owned by Pappas Telecasting Co. Watkins was most recently president of Accela Marketing in El Paso, and prior to that he held sales posts at Entravision.

#### RADIO

**Michele Williams** was named program director for Greater Media-owned WBOS-FM in Boston. She had been assistant program director/music director... **Bruce Graham** has been named senior director of sales for ABC Radio Networks in Detroit. He had been managing director of the Midwest region for MediaAmerica, the network sales organization of Jones Radio Networks... **Mark Steinmetz** has joined Infinity Broadcasting as senior vp and market manager for the company’s Phoenix stations. He was vp of operations and station development for America Media Services, a radio brokerage firm... **Terry Fahy** has been named vp and general manager for KKLA-AM, KFSH-FM, KRLA-AM, KTIE-AM, and KXXM-AM, Salem Communications’ stations in Los Angeles. Fahy had been acting general manager of the stations.



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# inside media

NEWS OF THE MARKET

## Ryan Seacrest to Host American Top 40

Radio and TV personality Ryan Seacrest will take over as host of countdown radio show *American Top 40* from Casey Kasem, the guy who started the genre 30 years ago. Kasem, who recently signed a new long-term contract with Premiere Radio Networks that will take him into the next decade, will continue as host of the two versions of *American Top 20*. With Seacrest as the new host of the weekly *AT40*, the show will feature new interactive elements using the Internet, allowing the audience to vote for their favorite songs and enter contests, in addition to counting down the 40 biggest songs of the week. *AT40* will originate from Seacrest's studio in Hollywood, where he will also do his syndicated daily TV show from Twentieth Television, *On Air With Ryan Seacrest*, launching Jan. 12. Seacrest is also co-host of Fox's top-rated *American Idol*.

## Hallmark Adds Subs in Illinois

Hallmark Channel has signed a distribution deal with Insight Communications for carriage on its Bloomington, Ill., system, which will bring the cable network's year-to-year subscriber growth to 7.7 million. Hallmark is currently available to 56 million subs in the U.S. Insight Communications serves approximately 1.4 million customers in Illinois, Kentucky, Indiana and Ohio.

## Fairchild Moves *Vitals* Launch to Sept.

Fairchild Publications has pushed back the launch date of its men's shopping quarterly, *Vitals*, from March to September 2004. The company has also named Joe Zee, fashion director for *W*, as editor in chief of the *Details* spinoff. *Vitals* will focus on high-end luxury and will directly compete next year against *Cargo*, the new title from sister-company Condé Nast set to launch in March. *Cargo* will be a bimonthly spinoff of CN's women's shopping magazine *Lucky*.

## Wallpaper to Launch Travel Spinoff in Feb.

*Wallpaper\**, published by Time Inc.'s U.K.-based IPC Media, will spin off a biannual urban travel magazine called *Navigator\**. On stands Feb. 12, *Navigator\** will sell for \$9.95.

## Sprint, MCI to Deploy TWC Phone Service

Time Warner Cable has formed a strategic partnership with telecommunications providers MCI and Sprint to deploy Digital Phone, the cable operator's Internet

Protocol voice service. TWC has so far tested the service with subscribers in Portland, Maine, and in areas of North Carolina, and plans an aggressive rollout through 2004. The Digital Phone enables the cable operator to offer consumers combined cable, high-speed Internet service and telephony at a competitive price. The Digital Phone offers the same quality and array of services as traditional phone service, according to a TWC statement. Also, customers can keep their same phone numbers and directory listing if they sign on. MCI and Sprint will help TWC roll out the phone service.

## History Channel in Deal for NBA Docs

In its first partnership with a major sports league, The History Channel has inked a deal with the National Basketball Association that gives the network two basketball documentaries as well as significant on-air exposure on NBA TV. Under the multiyear agreement, THC will air two NBA-produced docs, one in spring 2004 and another in spring 2005, prior to playoff season, and will sponsor NBA TV's retro games under the banner "Hardwood Classics Nights." Also, THC will be linked with Hardwood Classics merchandise, the history section on NBA.com, and vignettes entitled *Great Moments in NBA History*.

## Westwood One Renews Pact With USGA

Westwood One has renewed its multiyear agreement with the United States Golf Association to continue as the exclusive network radio home of the U.S. Open. Westwood's coverage of the U.S. Open Golf Championships, broadcast since 1999, includes the 2004 U.S. Open, June 17-20 at Shinnecock Hills Golf Club in Southampton, N.Y., and the 2005 U.S. Open at Pinehurst Country Club in Pinehurst, N.C.

## Dogs Pull Viewers to NBC on T'Day

The second annual National Dog Show Thanksgiving Day telecast on NBC drew some 1.6 million more total viewers than the 19 million who watched last year, according to Nielsen Media Research. The two-hour telecast, presented by Purina, aired at noon following the Macy's Thanksgiving Parade and generated a 5.7 household rating, up 8 percent from last year and high for afternoon programming. It's NBC's second year televising the event, which has run every year since 1933. ■

## Calendar

The Television Critics Association's **Winter Press Tour** will be held Jan. 6-18 at the Renaissance Hollywood Hotel in Los Angeles. Programming presentation schedules by cable and broadcast networks will be as follows: cable, Jan. 6-9; PBS, Jan. 10; Pax, Jan. 11; TCA Members Day, Jan. 12; the WB, Jan. 13; NBC, Jan. 14; ABC, Jan. 15; Fox, Jan. 16; CBS, Jan. 17; and UPN, Jan. 18. Contact: Kay McFadden, TCA president, at [kmcfadden@seattletimes.com](mailto:kmcfadden@seattletimes.com).

**National Association of Television Program Executives** will hold its annual conference and exhibition Jan. 18-20 at the Las Vegas Sands Expo Center and Venetian Hotel. The event will offer 30 sessions on a wide array of topics, as well as 10 supersessions. For more information, visit [natpe.org](http://natpe.org) or call 310-453-4440.

Strategic Research Institute will present the "**Marketing to U.S. Hispanics and Latin America**" conference Jan. 25-27 at the Roney Palace Beach Resort in Miami Beach. Contact: 212-967-0095.

The Association of National Advertisers will present the **ANA Agency Relations Forum** Jan. 28 at the Grand Hyatt Hotel in New York. Issues to be addressed include maximizing effectiveness in the client/agency relationship; managing integrated marketing communications; sustaining a long-term partnership, with a look at the 20-year Visa/BBDO relationship; and Super Bowl advertising. Contact: Joanne Forbes, 212-455-8086 or [jforbes@ana.net](mailto:jforbes@ana.net).

**American Association of Advertising Agencies' 11th annual Media Conference & Trade Show** will be held at the Royal Pacific Resort in Orlando, Fla., Feb. 11-13. Sessions and workshops cover issues concerning media buyers and sellers. Contact: 212-682-2500 or visit [www.aaa.org](http://www.aaa.org).

Interep's **Power of Urban Radio Symposium** will be held Feb. 24 at the Hyatt Regency Hotel in Chicago. Renetta McCann, CEO of Starcom, will keynote. Contact: Sherman Kizart, 312-616-7204 or [sherman\\_kizart@interep.com](mailto:sherman_kizart@interep.com).

EAST

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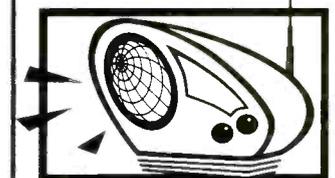
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# Culture Trends

## NIELSEN MEDIA RESEARCH

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Cosmetics ad spending by media industry.

January-August 2003

Medium	\$(000)
Cable TV	1,107,195
Hispanic Network TV	0
Local Newspapers	118,327
National Magazines	15,939,524
National Newspapers	78,246
National Sunday Supplement	530,046
National Radio	0
Network TV	722,300
Outdoor	689,928
Spot TV	2,567,011
Syndicated TV	0
<b>TOTAL</b>	<b>21,752,577</b>

SOURCE: Nielsen Monitor Plus

## THE HOLLYWOOD REPORTER'S BOX OFFICE

THIS WEEK	LAST WEEK	PICTURE	WEEKEND GROSS	DAYS IN RELEASE	TOTAL GROSS
1	NEW	<b>THE LAST SAMURAI</b>	24,271,354	3	24,271,354
2	NEW	<b>HONEY</b>	12,856,040	3	12,856,040
3	2	<b>HAUNTED MANSION</b>	9,394,185	12	45,974,409
4	3	<b>ELF</b>	8,026,797	31	139,527,719
5	1	<b>THE CAT IN THE HAT</b>	7,141,855	17	85,297,270
6	5	<b>BAD SANTA</b>	7,014,010	12	27,138,311
7	4	<b>GOTHIKA</b>	5,250,356	17	49,545,578
8	7	<b>THE MISSING</b>	4,034,563	12	21,805,272
9	6	<b>MASTER &amp; COMMANDER</b>	3,722,008	24	72,555,668
10	9	<b>LOVE ACTUALLY</b>	3,561,360	31	48,743,275

For week ending December 7, 2003

Source: Hollywood Reporter

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## The Road Ahead

### Publishers are forecasting a promising first quarter but are hardly ready to call 2004 a cakewalk

WITH YET ANOTHER CHALLENGING YEAR BEHIND THEM, PUBLISHERS ARE NOW EMBRACING some encouraging signs that may portend a brighter, more profitable road ahead. While the Publishers Information Bureau reported total magazine ad pages fell in November for the sixth consecutive

month—down 2.8 percent over last year—and dipped 0.5 percent for the first 11 months, economic forecasts released last week, as well as some promising news in key ad categories, may help lead the way to recovery in 2004.

National magazine spending next year will rise 5 percent to \$12.4 billion, predicts Robert Coen, Universal McCann's senior vp, director of forecasting. ZenithOptimedia is even more bullish, projecting that ad revenue will jump 6 percent to \$17.5 billion.

Already, publishers are foreseeing gains in a number of ad categories for first quarter, including automotive, pharmaceuticals, and beauty & travel, although the financial sector is still soft and uncertainty prevails in retail and fashion.

Industry observers remain extremely cautious. With media buyers increasingly conducting last-minute business and many '04 budgets still not yet finalized, any recovery will



**"I'm seeing a moderate start to the year—not slow and foot-dragging, but nothing much to celebrate about [either]. I just see it tottering along." RUTMAN**

likely be a long, drawn-out affair. "I'm seeing a moderate start to the year—not slow and foot-dragging, but nothing much to celebrate about [either]. I just see it tottering along," says Charlie Rutman, president of Carat USA, whose clients include Pfizer and Adidas. "Some clients are holding off spending decisions until after the holiday season, some are still trying to get a fine handle on budgets, and some are stepping

up and showing a little more confidence."

"It's a slow build," concurs Michael Clinton, Hearst Magazines executive vp, chief marketing officer. "There are no big spikes up and no big spikes down. If the economy holds, it'll play out over the course of the year."

Publishers are seeing positive growth signs in automotive. Given that carmakers are typically the industry's top spender, that's good news. "The [car] industry has had its ups and downs over the years," says Ed Abramson, vp, group publisher of Hachette Filipacchi Media's *Car and Driver* and *Road & Track*. "But there's a lot of positive feeling [that] we're coming out

of the recession and they'll make some money if they don't get into rebate wars." Abramson also notes there's a bevy of new cars rolling out next year, which should help. *Car and Driver* ads in January are up 29 percent to 100 pages, while *Road & Track* is up 16.1 percent to 105 pages, reports the *Mediaweek Monitor*. The Hachette

titles will benefit from new lines, including the Mazda RX8, the BMW 5 and 6 series, and the reintroduction of the Pontiac GTO.

Rival *Automobile* and *Motor Trend*, published by Primedia, saw softness in January. *Automobile* fell 4.4 percent to 57 pages, and *Motor Trend* dropped 6.4 percent to 78. The titles in January slashed their rate bases 12 percent; *Automobile* will fall to 550,000, and *MT* will drop to 1.1



**Mark Whitaker** Editor, *Newsweek*

**Q.** Any hints on what's in *Newsweek's* year-end *Who's Next* issue (Dec. 29)? **A.** We're going to look at somebody who we think may have a big role in framing what young people think about the election, and we're going to talk about somebody who has played a big role in business stories this year, but who also could be a political story going forward. **Q.** Speaking of *who's next*, what are your plans for the elections? **A.** We'll have some old things and some new things. We'll have our election project, which is the first book on the election, except we publish it literally the day after. The new thing is looking throughout the election at young voters, both trying to get their voices in the magazine and onto the Web, looking at the issues that particularly interest them, as well as polling

them. **Q.** Why the focus on youth? **A.** They have gotten more engaged [in politics]. It's partly because of Iraq, which has created a lot of debate on campuses, and because of the Internet as demonstrated mostly by the [Howard] Dean campaign. **Q.** So, what's been the most memorable election you've ever covered? **A.** The most surreal moment was in 2000 when it went into overtime in Florida. All of a sudden Al Gore started calling me every Friday, clearly to see if our cover was going to hurt or help him. The second week [of the recount] we had an illustration of Bush and Gore fighting, each with black eyes and so forth. He called me up the following Friday, and in the middle of the conversation he said, 'Mark, you know, I'm taller than George Bush.' Because the illustration made it look like Bush was taller. Apparently, the taller candidate has won the presidential election nine out of 10 times in our history.

# Mediaweek Magazine Monitor

MONTHLIES JANUARY 2004

	RATE BASE (1ST HALF '03)	CIRC. (1ST HALF '03)	CURRENT PAGES	PAGES LAST YR.	% CHANGE	YEAR TO DATE	YTD LAST YEAR	% CHANGE
<b>BUSINESS/TECHNOLOGY</b>								
Business 2.0 <sup>11</sup>	550,000	553,306	NO ISSUE			0.00	0.00	N.A.
Entrepreneur	550,000	560,990	149.86	157.49	-4.84%	149.86	157.49	-4.84%
Fast Company	725,000	738,573	39.39	55.22	-28.67%	39.39	55.22	-28.67%
Fortune Small Business <sup>10</sup>	1,000,000	1,000,100 <sup>B</sup>	NO ISSUE			0.00	0.00	N.A.
Inc <sup>E</sup>	665,000	686,600	57.89	64.81	-10.68%	57.89	64.81	-10.68%
Technology Review <sup>10</sup>	315,000	318,848	26.65	32.00	-16.72%	26.65	32.00	-16.72%
Wired	525,000	539,963	64.67	59.33	9.00%	64.67	59.33	9.00%
<b>Category Total</b>			<b>338.46</b>	<b>368.85</b>	<b>-8.24%</b>	<b>338.46</b>	<b>368.85</b>	<b>-8.24%</b>
<b>ENTERTAINMENT</b>								
Blender <sup>11/D</sup>	410,000	450,871	45.45	41.96	8.32%	45.45	41.96	8.32%
Movieline's Hollywood Life <sup>9</sup>	250,000 <sup>X</sup>	251,986	NO ISSUE			0.00	0.00	N.A.
Premiere <sup>11</sup>	500,000 <sup>Q</sup>	534,198	NO ISSUE			0.00	0.00	N.A.
The Source	500,000	501,743	58.17	75.66	-23.12%	58.17	75.66	-23.12%
Spin	525,000	527,384	44.02	48.89	-9.96%	44.02	48.89	-9.96%
Vibe <sup>10</sup>	825,000	831,188	47.58	61.21	-22.27%	47.58	61.21	-22.27%
<b>Category Total</b>			<b>195.22</b>	<b>254.63</b>	<b>-23.33%</b>	<b>195.22</b>	<b>254.63</b>	<b>-23.33%</b>
<b>ENTHUSIAST</b>								
Automobile	625,000	637,437	56.98	59.63	-4.44%	56.98	59.63	-4.44%
Backpacker <sup>9</sup>	295,000	306,503	NO ISSUE			0.00	0.00	N.A.
Bicycling <sup>11</sup>	400,000 <sup>Q</sup>	378,977	26.59	23.12	15.02%	26.59	23.12	15.02%
Boating	None	200,783	123.33	100.83	22.31%	123.33	100.83	22.31%
Car and Driver	1,350,000	1,377,395	99.94	77.67	28.67%	99.94	77.67	28.67%
Cruising World	155,000	156,542	100.88	99.58	1.31%	100.88	99.58	1.31%
Cycle World	325,000	325,444	62.00	67.50	-8.15%	62.00	67.50	-8.15%
Flying	None	301,421	46.84	47.00	-0.34%	46.84	47.00	-0.34%
Golf Digest	1,550,000	1,566,586	107.40	110.99	-3.23%	107.40	110.99	-3.23%
Golf Magazine	1,400,000	1,415,009	96.63	101.86	-5.13%	96.63	101.86	-5.13%
Motor Boating	130,000	156,741	77.99	84.58	-7.79%	77.99	84.58	-7.79%
Motor Trend	1,250,000	1,276,811	78.00	83.30	-6.36%	78.00	83.30	-6.02%
Popular Mechanics	1,200,000	1,222,351	49.00	42.63	14.94%	49.00	42.63	14.94%
Popular Photography & Imaging	450,000	456,423	135.16	142.17	-4.93%	135.16	142.17	-4.93%
Popular Science	1,450,000	1,473,270	52.30	51.30	1.95%	52.30	51.30	1.95%
Power & Motoryacht	150,000	156,859 <sup>B</sup>	182.71	179.45	1.82%	182.71	179.45	1.82%
Road & Track	750,000	751,584	104.89	90.34	16.11%	104.89	90.34	16.11%
Sailing World <sup>10</sup>	50,000	54,773	NO ISSUE			0.00	0.00	N.A.
Stereo Review's Sound & Vision <sup>10</sup>	400,000 <sup>Q</sup>	411,595	66.99	71.83	-6.74%	66.99	71.83	-6.74%
Tennis Magazine <sup>10</sup>	700,000	715,693	20.79	NO ISSUE	N.A.	20.79	0.00	N.A.
Yachting	130,000	142,468	191.00	117.75	62.21%	191.00	117.75	62.21%
<b>Category Total</b>			<b>1,679.42</b>	<b>1,551.53</b>	<b>8.24%</b>	<b>1,679.42</b>	<b>1,551.53</b>	<b>8.24%</b>
<b>FASHION/BEAUTY</b>								
Allure	950,000	999,734	35.12	48.71	-27.90%	35.12	48.71	-27.90%
Cosmopolitan	2,800,000	2,860,024	81.09	76.26	6.33%	81.09	76.26	6.33%
Elle	1,000,000	1,014,418	35.00	38.32	-8.66%	35.00	38.32	-8.66%
Essence	1,050,000	1,068,214	81.07	55.74	45.44%	81.07	55.74	45.44%
Glamour	2,200,000	2,244,012	47.83	52.39	-8.70%	47.83	52.39	-8.70%
Harper's Bazaar	700,000	725,491	40.53	29.68	36.56%	40.53	29.68	36.56%
In Style	1,600,000	1,698,080	77.79	73.09	6.43%	77.79	73.09	6.43%
Jane <sup>10</sup>	700,000 <sup>Q</sup>	668,276	NO ISSUE			0.00	0.00	N.A.
Latina <sup>11</sup>	250,000	263,165	NO ISSUE			0.00	0.00	N.A.
Lucky	800,000	834,802	30.18	24.19	24.76%	30.18	24.19	24.76%
Marie Claire	875,000 <sup>Q</sup>	885,993	63.08	60.62	4.06%	63.08	60.62	4.06%
Vogue	1,100,000	1,174,677	60.85	85.87	-29.14%	60.85	85.87	-29.14%
W	450,000	467,758	36.00	41.61	-13.48%	36.00	41.61	-13.48%
<b>Category Total</b>			<b>588.54</b>	<b>586.48</b>	<b>0.35%</b>	<b>588.54</b>	<b>586.48</b>	<b>0.35%</b>
<b>FOOD/EPICUREAN</b>								
Bon Appétit	1,250,000	1,302,311	69.55	68.10	2.13%	69.55	68.10	2.13%
Cooking Light <sup>11/D</sup>	1,600,000	1,617,193	125.17	134.88	-7.20%	125.17	134.88	-7.20%
Food & Wine	900,000	964,206	63.57	51.33	23.85%	63.57	51.33	23.85%
Gourmet	950,000	985,165	57.80	47.91	20.64%	57.80	47.91	20.64%
<b>Category Total</b>			<b>316.09</b>	<b>302.22</b>	<b>4.59%</b>	<b>316.09</b>	<b>302.22</b>	<b>4.59%</b>
<b>GENERAL INTEREST</b>								
Guideposts	2,600,000	2,638,814	24.92	7.50	232.27%	24.92	7.50	232.27%
Harper's Magazine	205,000	231,670	21.75	13.83	57.27%	21.75	13.83	57.27%
National Geographic	6,600,000	6,685,684	26.48	15.72	68.45%	26.48	15.72	68.45%
People en Español <sup>11</sup>	400,000	407,679	NO ISSUE			0.00	0.00	N.A.
Reader's Digest	11,000,000	11,090,349	67.59	48.46	39.48%	67.59	48.46	39.48%
Smithsonian	2,000,000	2,030,020	33.00	30.00	10.00%	33.00	30.00	10.00%
The Atlantic Monthly <sup>11</sup>	450,000	520,174	NO ISSUE			0.00	0.00	N.A.
Vanity Fair	1,000,000	1,124,471	46.02	50.50	-8.87%	46.02	50.50	-8.87%
<b>Category Total</b>			<b>219.76</b>	<b>166.01</b>	<b>32.38%</b>	<b>219.76</b>	<b>166.01</b>	<b>32.38%</b>
<b>HEALTH/FITNESS (MEN)</b>								
Flex	None	152,845	142.61	169.17	-15.70%	142.61	169.17	-15.70%
Muscle & Fitness	None	420,509	105.32	122.58	-14.08%	105.32	122.58	-14.08%
Runner's World	520,000	533,082	38.50	37.00	4.05%	38.50	37.00	4.05%
<b>Category Total</b>			<b>286.43</b>	<b>328.75</b>	<b>-12.87%</b>	<b>286.43</b>	<b>328.75</b>	<b>-12.87%</b>
<b>HEALTH/FITNESS (WOMEN)</b>								
Fitness	1,300,000	1,384,067	57.97	57.48	0.85%	57.97	57.48	0.85%
Health <sup>10/D</sup>	1,350,000	1,389,350	100.99	98.55	2.48%	100.99	98.55	2.48%
Prevention	3,200,000	3,277,746	65.33	57.51	13.60%	65.33	57.51	13.60%
Self	1,250,000	1,347,650	45.10	52.78	-14.55%	45.10	52.78	-14.55%
Shape	1,600,000	1,635,266	60.19	61.21	-1.67%	60.19	61.21	-1.67%
<b>Category Total</b>			<b>329.58</b>	<b>327.53</b>	<b>0.63%</b>	<b>329.58</b>	<b>327.53</b>	<b>0.63%</b>
<b>KIDS</b>								
Boys' Life	1,300,000	1,384,475	11.01	9.02	22.06%	11.01	9.02	22.06%
Disney Adventures <sup>10</sup>	1,200,000	1,334,836 <sup>B</sup>	NO ISSUE			0.00	0.00	N.A.

million. Ad rates for both titles also will be lowered 6 percent, says Lou Mohn, president of Primedia's consumer automotive group.

A number of women's titles are also seeing a bump in auto ads. Over at Weider Publications' *Shape*, Carolyn Bekkedahl, executive vp, group publisher of the Active Lifestyle Group, says while January was soft, down 1.7 percent to 60, the fitness monthly in first quarter '04 will see ads for the first time from Jaguar, as well as Mitsubishi; others such as Toyota,



Grimes is bullish on car launches in '04.

Honda and Nissan are committing earlier this year compared to '03. February, with 77 pages, is roughly even with last year, she notes.

"A lot of [car] launches are on the moderate end in '04, though not too low-level, which is good for *Glamour*," says Suzanne Grimes, *Glamour*'s vp/publisher. "That makes for a good year." The Condé Nast fashion title in February signed on Mazda for the first time. Still, *Glamour* had a slow start, January slid 8.7 percent to 48 pages (though through February, Grimes predicts the monthly will grow 15 percent to 133 pages). Rival *Cosmo* has had a better start, up in January 6.3 percent to 81 pages.

The past year has been a solid one for the drugs & remedies category, which rose 19.9 percent through November to \$1.4 billion, according to PIB. Next year also looks promising, with a heaping dose of ads targeting both men and women. "Pharmaceuticals continue to look strong," says Bill Holiber, publisher of *U.S. News & World Report*. Holiber, Primedia's Mohn and Hachette's Abramson all say Viagra and Levitra are heating up, and newcomer Cialis will break in February and March.

Meanwhile, a January redesign of Rodale's *Prevention* has paid off, says vp, group publisher Denise Favorule. Direct-to-consumer ad revenue in February is up 40 percent over the prior year, including first-time advertisers Advair (an asthma medication) and Eco-trin aspirin. Through February, advertising



Favorule says beauty will be big.

**MONTHLIES JANUARY 2004**

	RATE BASE (1ST HALF '03)	CIRC. (1ST HALF '03)	CURRENT PAGES	PAGES LAST YR.	% CHANGE	YEAR TO DATE	YTD LAST YEAR	% CHANGE
Nickelodeon Magazine <sup>10</sup>	1,050,000	1,069,369 <sup>B</sup>	NO ISSUE			0.00	0.00	N.A.
Sports Illustrated for Kids	1,000,000	1,021,725 <sup>B</sup>	23.03	16.00	43.94%	23.03	16.00	43.94%
<b>Category Total</b>			<b>34.04</b>	<b>25.02</b>	<b>36.05%</b>	<b>34.04</b>	<b>25.02</b>	<b>36.05%</b>
<b>MEN'S LIFESTYLE</b>								
Details <sup>10</sup>	400,000	418,005	NO ISSUE			0.00	0.00	N.A.
Esquire	700,000	724,617	42.60	27.14	56.96%	42.60	27.14	56.96%
FHM+	1,100,000	1,103,434	59.01	48.33	22.10%	59.01	48.33	22.10%
Gentlemen's Quarterly	750,000	764,512	37.27	41.88	-11.01%	37.27	41.88	-11.01%
Maxim	2,500,000	2,515,356	48.02	54.24	-11.47%	48.02	54.24	-11.47%
Men's Fitness	600,000	630,582	53.51	53.03	0.91%	53.51	53.03	0.91%
Men's Health <sup>10</sup>	1,625,000	1,697,026	75.32	60.15	25.22%	75.32	60.15	25.22%
Men's Journal	650,000	653,230	50.46	58.55	-13.82%	50.46	58.55	-13.82%
Penthouse	None	477,357	30.14	33.35	-9.63%	30.14	33.35	-9.63%
Playboy	3,150,000	3,154,942	96.61	37.84	155.31%	96.61	37.84	155.31%
Stuff	1,200,000	1,212,695	48.49	44.33	9.38%	48.49	44.33	9.38%
<b>Category Total</b>			<b>541.43</b>	<b>458.84</b>	<b>18.00%</b>	<b>541.43</b>	<b>458.84</b>	<b>18.00%</b>
<b>OUTDOORS</b>								
Field & Stream <sup>11</sup>	1,500,000	1,531,046	NO ISSUE			0.00	0.00	N.A.
National Geographic Adventure <sup>10</sup>	400,000	403,626	NO ISSUE			0.00	0.00	N.A.
Outdoor Life <sup>9</sup>	900,000	949,313	NO ISSUE			0.00	0.00	N.A.
Outside	650,000	662,985	40.66	47.78	-14.90%	40.66	47.78	-14.90%
<b>Category Total</b>			<b>40.66</b>	<b>47.78</b>	<b>-14.90%</b>	<b>40.66</b>	<b>47.78</b>	<b>-14.90%</b>
<b>PARENTING/FAMILY</b>								
American Baby	2,000,000	2,002,402 <sup>B</sup>	53.41	49.61	7.66%	53.41	49.61	7.66%
BabyTalk <sup>10</sup>	2,000,000	2,001,280 <sup>B</sup>	NO ISSUE			0.00	0.00	N.A.
Child <sup>10</sup>	1,020,000	1,035,505	NO ISSUE			0.00	0.00	N.A.
FamilyFun <sup>10/D</sup>	1,750,000	1,769,003	NO ISSUE			0.00	0.00	N.A.
Parenting <sup>10</sup>	2,150,000	2,207,543	NO ISSUE			0.00	0.00	N.A.
Parents	2,200,000	2,232,793	75.73	86.48	-12.43%	75.73	86.48	-12.43%
<b>Category Total</b>			<b>129.14</b>	<b>136.09</b>	<b>-5.11%</b>	<b>129.14</b>	<b>136.09</b>	<b>-5.11%</b>
<b>PERSONAL FINANCE</b>								
Kiplinger's Personal Finance	1,000,000	1,023,618	32.18	39.46	-18.45%	32.18	39.46	-18.45%
Money	1,900,000	1,963,040	60.61	62.30	-2.71%	60.61	62.30	-2.71%
SmartMoney	800,000	811,263	59.07	53.61	10.18%	59.07	53.61	10.18%
<b>Category Total</b>			<b>151.86</b>	<b>155.37</b>	<b>-2.26%</b>	<b>151.86</b>	<b>155.37</b>	<b>-2.26%</b>
<b>SCIENCE</b>								
Discover	850,000	918,494	21.61	22.33	-3.22%	21.61	22.33	-3.22%
Natural History <sup>10</sup>	250,000	243,577	NO ISSUE			0.00	0.00	N.A.
Scientific American	660,000	670,135	66.33	17.17	286.31%	66.33	17.17	286.31%
Spectrum, IEEE	None	328,494	33.32	48.48	-31.27%	33.32	48.48	-31.27%
<b>Category Total</b>			<b>121.26</b>	<b>87.98</b>	<b>37.83%</b>	<b>121.26</b>	<b>87.98</b>	<b>37.83%</b>
<b>SHELTER</b>								
Architectural Digest	800,000	813,156	136.68	94.86	44.09%	136.68	94.86	44.09%
Country Home <sup>10</sup>	1,200,000	1,213,852	NO ISSUE			0.00	0.00	N.A.
Country Living	1,700,000	1,712,779	45.26	45.92	-1.44%	45.26	45.92	-1.44%
The Family Handyman <sup>10</sup>	1,100,000	1,166,040	NO ISSUE			0.00	0.00	N.A.
Home <sup>10</sup>	1,000,000	1,009,921	NO ISSUE			0.00	0.00	N.A.
House Beautiful	850,000	853,727	47.91	45.86	4.47%	47.91	45.86	4.47%
House & Garden	800,000 <sup>Q</sup>	910,277	34.68	48.90	-29.08%	34.68	48.90	-29.08%
Southern Living <sup>13</sup>	2,550,000	2,600,732	70.85	90.67	-21.86%	70.85	90.67	-21.86%
Sunset	1,400,000	1,429,565	47.83	53.75	-11.01%	47.83	53.75	-11.01%
This Old House <sup>10/D</sup>	950,000	964,064	60.58	55.31	9.53%	60.58	55.31	9.53%
<b>Category Total</b>			<b>443.79</b>	<b>435.27</b>	<b>1.96%</b>	<b>443.79</b>	<b>435.27</b>	<b>1.96%</b>
<b>TEEN</b>								
CosmoGirl! <sup>10</sup>	1,250,000	1,279,436	NO ISSUE			0.00	0.00	N.A.
Seventeen	2,350,000	2,409,289	82.12	75.90	8.19%	82.12	75.90	8.19%
Teen People <sup>10</sup>	1,600,000	1,587,331	NO ISSUE			0.00	0.00	N.A.
YM <sup>16</sup>	2,200,000	2,234,770	28.88	32.92	-12.27%	28.88	32.92	-12.27%
<b>Category Total</b>			<b>111.00</b>	<b>108.82</b>	<b>2.00%</b>	<b>111.00</b>	<b>114.62</b>	<b>-3.16%</b>
<b>TRAVEL</b>								
A. F.'s Budget Travel <sup>10</sup>	500,000	539,568	NO ISSUE			0.00	0.00	N.A.
Condé Nast Traveler	750,000	766,977	128.57	134.80	-4.62%	128.57	134.80	-4.62%
Travel + Leisure	950,000	971,464	89.27	92.76	-3.76%	89.27	92.76	-3.76%
<b>Category Total</b>			<b>217.84</b>	<b>227.56</b>	<b>-4.27%</b>	<b>217.84</b>	<b>227.56</b>	<b>-4.27%</b>
<b>WEALTH</b>								
Robb Report	None	107,372	78.66	73.50	7.02%	78.66	73.50	7.02%
Town & Country	450,000	458,316	70.10	63.73	10.00%	70.10	63.73	10.00%
<b>Category Total</b>			<b>148.76</b>	<b>137.23</b>	<b>8.40%</b>	<b>148.76</b>	<b>137.23</b>	<b>8.40%</b>
<b>WOMEN'S LIFESTYLE</b>								
Lifetime <sup>10</sup>	500,000	N.A. <sup>C</sup>	NO ISSUE			0.00	0.00	N.A.
Martha Stewart Living	2,300,000	2,367,426	43.12	50.67	-14.90%	43.12	50.67	-14.90%
More <sup>10</sup>	850,000	852,884	NO ISSUE			0.00	0.00	N.A.
O, The Oprah Magazine	2,100,000	2,532,621	55.84	51.43	8.57%	55.84	51.43	8.57%
Real Simple <sup>10</sup>	1,200,000	1,375,355	NO ISSUE			0.00	0.00	N.A.
<b>Category Total</b>			<b>98.96</b>	<b>102.10</b>	<b>-3.08%</b>	<b>98.96</b>	<b>102.10</b>	<b>-3.08%</b>
<b>WOMEN'S SERVICE</b>								
Better Homes and Gardens	7,600,000	7,611,005	85.67	79.53	7.72%	85.67	79.53	7.72%
Family Circle <sup>15</sup>	4,600,000	4,578,589	63.54	55.73	14.01%	63.54	55.73	14.01%
Good Housekeeping	4,600,000	4,603,989	106.95	97.37	9.84%	106.95	97.37	9.84%
Ladies' Home Journal	4,100,000	4,100,068	65.42	51.77	26.37%	65.42	51.77	26.37%
Redbook	2,350,000	2,371,371	67.64	66.23	2.13%	67.64	66.23	2.13%
Woman's Day <sup>17</sup>	4,050,000	4,065,406	55.06	56.81	-3.08%	55.06	56.81	-3.08%
<b>Category Total</b>			<b>444.28</b>	<b>407.44</b>	<b>9.04%</b>	<b>444.28</b>	<b>407.44</b>	<b>9.04%</b>
<b>MEDIAWEEK MONITOR TOTALS</b>			<b>6,436.53</b>	<b>6,207.06</b>	<b>3.70%</b>	<b>6,436.52</b>	<b>6,212.86</b>	<b>3.60%</b>

Rate base and circulation figures according to the Audit Bureau of Circulations for the first half of 2003 except: B=audited by BPA International, C=non-audited title, Q=raised rate base during period and X=did not file audit by deadline; D=Jan./Feb. double issue; E=estimated; J=Jan./Feb. combined issue in 2003 only; P=2003 YTD includes special Prom issue, 5.8 ad pages; 9=publishes 9 times; 10=publishes 10 times; 11=publishes 11 times; 13=publishes 13 times; 15=publishes 15 times; 17=publishes 17 times; +=publishes one more issue in 2004 than in 2003

pages will increase nearly 20 percent to just over 100 pages, predicts Favorule.

Beauty is also strong. *Shape* in February will introduce toiletries and cosmetics such as Clarins, and *Prevention* will run gatefolds off its new Bobbi Brown column; Eucerin lotion will appear in February, while new advertiser Nivea will run in March.

For the past two years, terrorism and tough economic times have taken their toll on the travel industry, but even so, *Condé Nast Traveler* vp, publisher Lisa Hughes and *Robb Report* vp, publisher Ernie Renzulli say they're optimistic. "Travel is always vulnerable to world events and we're most vulnerable," says Hughes. "But the smart marketers like the Four Seasons and the Ritz-Carlton know they have to fill rooms and will be out there in a big way. *Traveler* in January fell 4.6 percent to 129 pages, though it remains the second-biggest January issue behind last year's. Hughes expects *Traveler's* first quarter to be up 10 percent, thanks to growth in domestic travel ads (Phoenix, Washington, D.C. and Las Vegas), as well as increased spending from airlines (Delta Airlines spinoff Delta Song and Virgin). Renzulli also notes four- and five-star resorts are coming back.

However, publishers are still waiting for a turnaround in financial advertising, as well as retail and fashion. For the past two years, the financial category has struggled, and the recent mutual funds scandals affecting Putnam and Janus have not helped matters. "It's recovering," says *Money* publisher Mike Dukmejian. "But part of this mutual fund scandal may affect some of the asset-management companies." On a brighter note, however, traditional brokers such as Smith Barney and Morgan Stanley are coming back. In January, *Money* fell 2.7 percent to 61 pages; *SmartMoney*, published by Hearst and Dow Jones & Co., grew 10.2 percent to 59 pages.

Publishers say the fashion and retail categories are still up in the air. Christmas will be key in determining the big-budget schedules. "It felt like it was getting a little more buoyant around Thanksgiving, but the snow is making it harder to read how the market is doing," says *Glamour's* Grimes. "Our strengths are retail partnerships and programs, which help us in a tough market." Grimes says gains are not yet coming from larger client budgets. "That's what you want to hear—big, reinvigorated spending, aggressive outlooks—but we're just not hearing that."—LG

## Crazy in Alabama

### SI must reveal sources

Time Inc.'s *Sports Illustrated* is exploring the possibility of appealing an Alabama district court ruling last week that would force the weekly to reveal its sources for an article that led to the firing last May of University of Alabama football coach Mike Price. The coach sued Time Inc. and *SI* writer Don Yaeger for \$20 million, saying he was libeled and slandered by an article written last May that detailed his alleged exploits at a strip club in Pensacola, Fla.

Because of a loophole in Alabama's Shield Law that excludes the protection of magazine journalists from revealing their sources, United States District Court judge Lynwood Smith in Birmingham last week ruled that Time Inc.'s *Sports Illustrated* has until Dec. 19 to disclose its unnamed sources.

Smith said he would need to know the identity of Yaeger's sources to determine whether the allegations of Price's behavior were true, and maintained that the Alabama law protecting journalists covers only newspapers, television and radio, and not magazines. "Those laws are passed through the pressure from publishing groups and the language probably by happenstance didn't include other media," explains Matthew Bunker, University of Alabama's Reese Phifer professor of journalism. "A problem with those shield laws generally is that courts tend to interpret them strictly." Bunker notes, however, that an appeals court might look at the shield law and rule that it should be interpreted more broadly to include magazines.

### WEEKLIES DECEMBER 15, 2003

	ISSUE DATE	CURRENT PAGES	ISSUE DATE LAST YEAR	PAGES LAST YEAR	PERCENT CHANGE	YTD PAGES	YTD LAST YEAR	PERCENT CHANGE
<b>NEWS/BUSINESS</b>								
BusinessWeek	15-Dec	77.57	16-Dec	86.99	-10.83%	2,912.67	3,203.51	-9.08%
The Economist	6-Dec	51.00	7-Dec	66.00	-22.73%	2,029.00	2,217.00	-8.48%
Newsweek <sup>E</sup>	15-Dec	35.06	16-Dec	43.95	-20.23%	1,983.29	1,947.71	1.83%
The New Republic <sup>+</sup>	15-Dec	18.69	16-Dec	4.33	331.64%	325.28	343.50	-5.30%
Time <sup>E</sup>	15-Dec	56.26	16-Dec	48.61	15.74%	2,260.01	2,271.36	-0.50%
U.S. News & World Report	15-Dec	31.11	16-Dec	19.29	61.28%	1,403.24	1,368.75	2.52%
The Weekly Standard	22-Dec	4.50	23-Dec	4.66	-3.43%	378.75	384.82	-1.58%
<b>Category Total</b>		<b>274.19</b>		<b>273.83</b>	<b>0.13%</b>	<b>11,292.24</b>	<b>11,736.65</b>	<b>-3.79%</b>

	ISSUE DATE	CURRENT PAGES	ISSUE DATE LAST YEAR	PAGES LAST YEAR	PERCENT CHANGE	YTD PAGES	YTD LAST YEAR	PERCENT CHANGE
<b>SPORTS/ENTERTAINMENT/LEISURE</b>								
AutoWeek	15-Dec	30.64	16-Dec	32.09	-4.52%	1,182.10	1,164.17	1.54%
Entertainment Weekly	12-Dec	36.83	13-Dec	47.24	-22.04%	1,824.95	1,820.13	0.26%
Golf World	12-Dec	10.99	13-Dec	20.67	-46.83%	898.02	1,254.88	-28.44%
New York <sup>+</sup>	15-Dec	54.80	16-Dec	38.40	42.71%	2,353.50	2,432.00	-3.23%
People	15-Dec	79.16	16-Dec	93.75	-15.56%	3,597.31	3,563.51	0.95%
Sporting News	15-Dec	17.00	16-Dec	15.00	13.33%	767.14	725.44	5.75%
Sports Illustrated <sup>@</sup>	15-Dec	75.68	16-Dec	97.58	-22.44%	2,261.21	2,446.60	-7.58%
The New Yorker	15-Dec	52.41	16-Dec	39.47	32.78%	2,196.35	2,149.83	2.16%
Time Out New York <sup>H</sup>	10-Dec	58.00	11-Dec	122.00	-52.46%	3,456.44	3,490.26	-0.97%
TV Guide	13-Dec	46.38	14-Dec	50.16	-7.54%	2,384.92	2,399.03	-0.59%
Us Weekly <sup>+</sup>	15-Dec	35.73	16-Dec	33.00	8.27%	1,224.30	1,021.64	19.84%
<b>Category Total</b>		<b>497.62</b>		<b>589.36</b>	<b>-15.57%</b>	<b>22,146.24</b>	<b>22,467.49</b>	<b>-1.43%</b>

	ISSUE DATE	CURRENT PAGES	ISSUE DATE LAST YEAR	PAGES LAST YEAR	PERCENT CHANGE	YTD PAGES	YTD LAST YEAR	PERCENT CHANGE
<b>SUNDAY MAGAZINES</b>								
American Profile	14-Dec	8.90	15-Dec	8.00	11.25%	461.30	444.59	3.76%
Parade	14-Dec	14.34	15-Dec	17.13	-16.29%	672.75	648.64	3.72%
USA Weekend	14-Dec	15.24	15-Dec	12.92	17.96%	609.40	605.00	0.73%
<b>Category Total</b>		<b>38.48</b>		<b>38.05</b>	<b>1.13%</b>	<b>1,743.45</b>	<b>1,698.23</b>	<b>2.66%</b>
<b>TOTALS</b>		<b>810.29</b>		<b>901.24</b>	<b>-10.09%</b>	<b>35,181.93</b>	<b>35,902.37</b>	<b>-2.01%</b>

E=estimated page counts; H=2002 Holiday double issue; +=one more issue in 2003 than in 2002; @=one fewer issue in 2003

### BIWEEKLIES DECEMBER 15, 2003

	ISSUE DATE	CURRENT PAGES	ISSUE DATE LAST YEAR	PAGES LAST YEAR	PERCENT CHANGE	YTD PAGES	YTD LAST YEAR	PERCENT CHANGE
<b>BUSINESS/ENTERTAINMENT</b>								
ESPN The Magazine	22-Dec	62.36	23-Dec	68.96	-9.57%	1,530.87	1,455.59	5.17%
Forbes	22-Dec	144.08	23-Dec	238.35	-39.55%	3,117.71	3,471.05	-10.18%
Fortune <sup>S</sup>	22-Dec	126.87	30-Dec	128.37	-1.17%	3,044.92	3,331.43	-8.60%
National Review	29-Dec	10.50	30-Dec	11.50	-8.70%	366.30	367.69	-0.38%
Rolling Stone <sup>D</sup>	25-Dec	110.82	26-Dec	77.35	43.27%	1,633.20	1,530.34	6.72%
<b>Category Total</b>		<b>454.63</b>		<b>524.53</b>	<b>-13.33%</b>	<b>9,693.00</b>	<b>10,156.10</b>	<b>-4.56%</b>

D=double issue; S=2003 is special issue: Investor Guide

CHARTS COMPILED BY AIMEE DEEKEN

"We're disappointed and we disagree with such a narrow reading of the Alabama shield law. The reporter's privilege is very important to all journalistic enterprises including maga-

zines," says an *SI* spokesman. "This decision may jeopardize *Sports Illustrated's*—and all magazines'—ability to engage in investigative journalism."—LG

# Prevent weight gain.

## Order the blue plate special. DECEMBER 2003

A WHOLE NEW WAY OF LIVING

**Prevention**  
magazine  
Prevention.com

# Happy Independence Day!

# #1

KTVK-TV, Phoenix, the nation's #1 independent television station, made history with its fourth consecutive sweep victory in November 2003.

It achieved a number one ranking in February, May, July and November 2003 (M-Su, 5am-2am). KTVK's record 2003 performance is a first-ever for an independent station.

*Happy Independence Day...  
and Happy Holidays!*

**News**  
**CHANNEL**  
ARIZONA'S FAMILY



BELO



## Bring Out Your Dead

**TO: THE STAFF ■ FROM: THE STANDARDS EDITOR ■ I THINK THIS IS A FITTING MOMENT**

for me to remind everyone that it is our strict policy here at *The New York Times* to only print obituaries about people who have died. Let me emphasize that this is not a change in procedure; we have always

observed the “die first” rule and I personally think it a valuable one. There are plenty of other sections for news about the living, such as, just for one example, the Living section. The obituary page should be reserved for the deceased. I have spoken to Bill and Arthur and they agree.

To: The Standards Editor  
From: The Public Editor

Al, I just wanted to let you know that I wholeheartedly concur with your memo on obit policy. I've only been a member of the *Times* family for three days but in that time, literally dozens of people have stopped me on the street and said, “Hey, I've been feeling a bit under the weather lately but that doesn't mean I want you to run an obit on me!” It is this kind of smart-ass remark I hope to be able to dispel as the *Times*' first Public Editor, because I know how painful and embarrassing it is for all of us to be the recipients of such comments. Right now, I need to know how the error came about and what we are doing to stop it from ever happening again. I'd appreciate any input you can give me.

To: The Public Editor  
From: The Obituary Editor

Al forwarded to me your memo inquiring how the error on the Sergava obit came about. As you can imagine, he and I are conducting a full-scale investigation. While not all the facts are in yet, at this point it appears that the party at fault was Ms. Sergava herself. Our reporter, after several hours of interroga-

tion by Al's Assistant Editor for Internal Security, broke down and admitted that he picked up the story from a very reputable British newspaper and that their reporter got his information from usually reliable sources. For Sergava to remain alive while two high-end publications were reporting her dead was, it seems to me, the height of journalistic irresponsibility and arrogance. I'm hoping that as the editor in charge of the public, you will make certain that Ms. Sergava, who is actually in a nursing home on Amsterdam Avenue, undergoes appropriate disciplinary measures.

To: The Standards Editor  
From: The Public Editor

I am forwarding to you Chuck's reply to my query on Ms. Sergava's obit. I can assure you that my people are already on their way to apply the disciplinary measures he mentions, but I'm not sure that we can afford to let the matter rest there. What especially worries me is the possibility that there exists among the staff a climate of complacency that encourages reporters and editors to assume that people are dead just because they happen to be supine and not moving or speaking. Shouldn't we address this problem, as well as that of obituary subjects who deliberately refuse to be dead even though so reported?

**Shouldn't we address the problem of obituary subjects who deliberately refuse to be dead even though so reported?**

To: The Executive Editor  
From: The Standards Editor

After kicking this around with Dan (and by the way, good hire there!), I'm recommending a change in *Times* policy: From now on, no obituary copy may be handed in until the reporter involved has physically confronted the obit's subject and confirmed through personal inspection—including, if necessary, prodding or pinching—that the subject is completely deceased. This is the only way we can insure that there will be no repetition of the Sergava tragedy.

To: The Standards Editor  
From: The Executive Editor

Al, you're dead right (no pun intended) about instituting a rigorous test to make sure our obits meet the strict standard of accuracy our readers demand from *The New York Times*. Indeed, the only flaw in your excellent proposal is that it doesn't address the qualifications problem. I think you'll be pleased with the solution I've come up with.

To: The Staff  
From: The Inquest Editor

Just a short note by way of introducing myself. As a medical examiner in Phoenix and Houston, as well as technical adviser on the hit television show *CSI: Kansas City*, I've had long experience in identifying deceased persons or, in the colorful argot of the trade, stiffs. I look forward to working with all of you in my new assignment as Inquest Editor of *The New York Times* and I remind you that I or members of my staff are always ready to accompany you to interviews, press conferences and stakeouts for instant mortality evaluations. On a personal note, while walking around the office, I've already noticed quite a few dead people working right here at the *Times*, so already I feel at home. Cheers! ■



AMAZING BUT TRUE

WOMEN'S HEMLINES  
GO UP AS THE ECONOMY  
GETS BETTER.



AMAZING BUT TRUE

MEN CHANGE THEIR  
MINDS TWO TIMES  
MORE OFTEN THAN  
WOMEN DO.



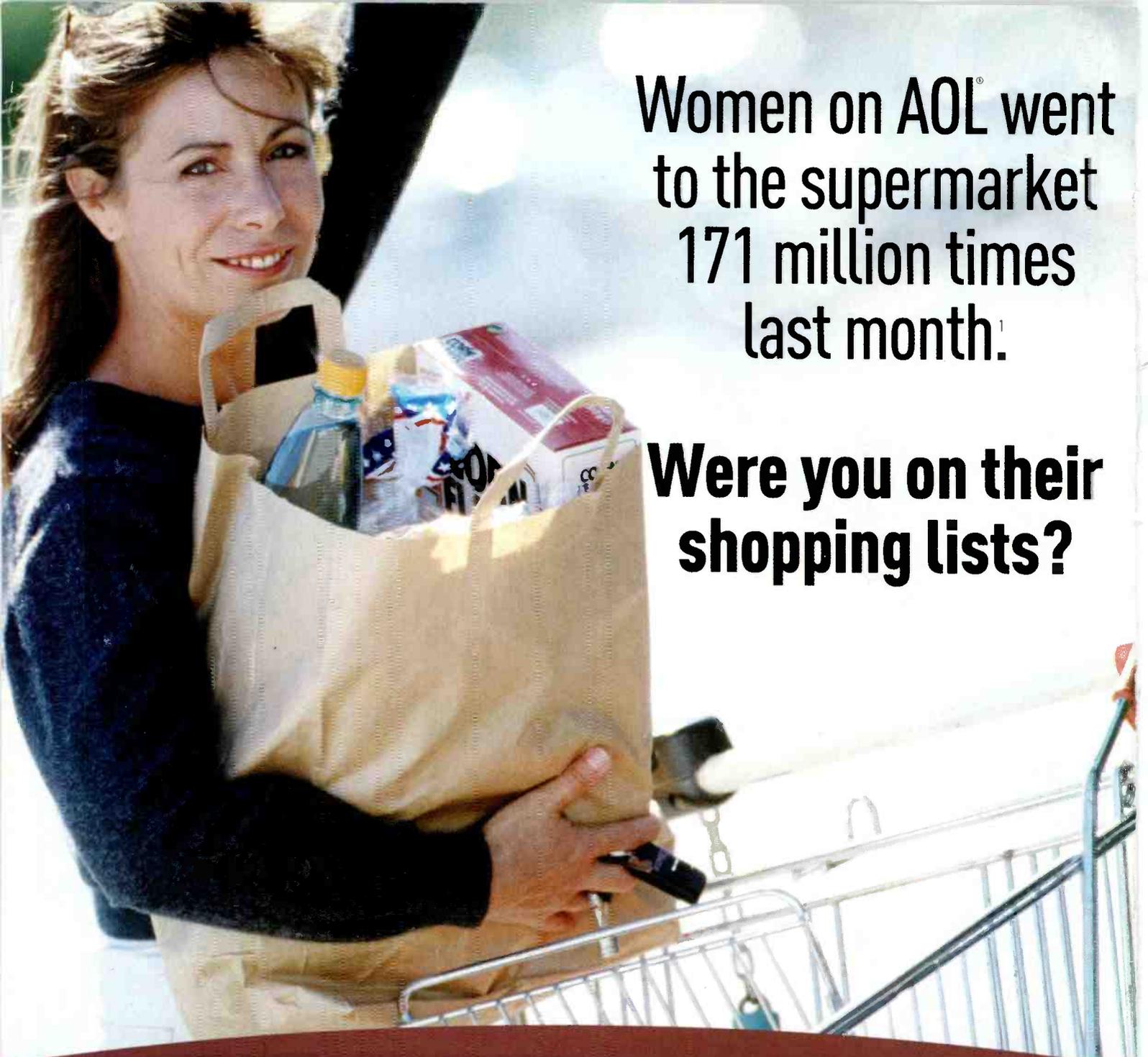
AMAZING BUT TRUE

#1 WITH  
WOMEN 18-49.

Nick@Nite was the most watched basic cable network with women 18-49 for the entire month of November. Proving that not only do women change their minds less, they don't change the channel either.

WE LOVE BEING NUMBER ONE.

*The view from the top is pretty sweet. Boy, there sure are a lot of bald people.*



Women on AOL went  
to the supermarket  
171 million times  
last month.

Were you on their  
shopping lists?

Introducing AOL Food—serving up crowd-pleasing, kitchen-tested recipes direct from the pages of everyone's favorite Time Inc. publications. Contact: Dave Jackson at (703) 265-1178 DaveJackson123@aol.com



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SouthernLiving

Sunset

COASTAL  
LIVING

health

Oxmoor  
HOUSE

Content from Food & Wine, In Style, Parenting and Essence coming soon.

AOL Keyword: Food

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