

John

TV
IN '95/55

Television/Radio Age

ROAD TO NATPE

Kidvid shakeout spurs shifts in daytime/41

SPOT TV DOLDRUMS

Lag of '88 seen continuing into 1989/50

HISPANIC MARKET

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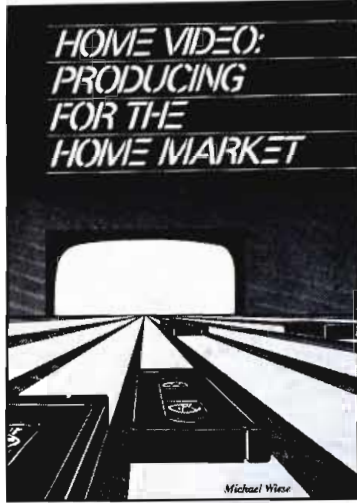
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Television/Radio Age

November 14, 1988

Volume XXXVI, No. 8

ROAD TO NATPE

Too many viewing options for children,
and not enough advertising dollars to go around

Kidvid shakeout spurs daytime shifts **41**

Affected by cutbacks in station expenditures;
'comfort factor' continues to draw audiences

Vintage shows swing with pendulum **47**

Carryover from '88 involves slow ad business,
dilution from 15s, cable and barter competition

Spot TV doldrums head into 1989 **50**

Demand for fatter slice of American apple pie,
but are multibillion-dollar predictions for real?

U.S. TV sky-high over Europe **53**

Comprehensive study of all television, cable
by Blair, Smith Barney looks ahead for 1995

Forecast sees healthy future for stations **55**

Hispanic Market Study

JOUR
HE
8690

A1

STATION REPORT

T2703
V.36
no. 8-14

Bottoms are tops as Cleveland draw **121**

DEPARTMENTS

10 Publisher's Letter	34 Radio Report	125 Spotlight On...
12 Final Edition	36 Radio Barometer	127 Wall Street
20 News About News	111 Viewpoints	128 Feedback
22 Sidelights	112 Programming	134 In the Picture
26 TV Barometer	119 Station Report	135 Washington
30 International	123 Seller's Opinion	136 Media Browse

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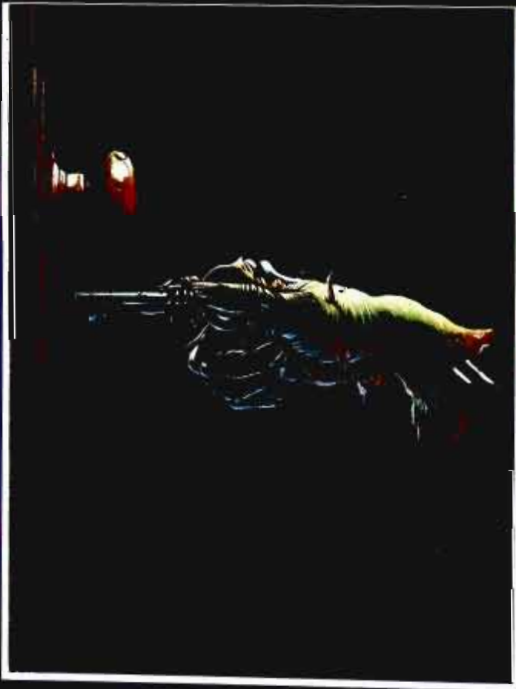


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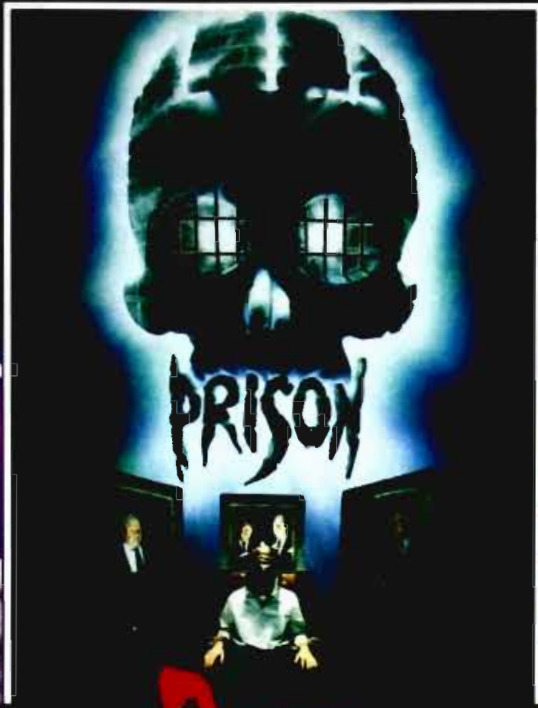
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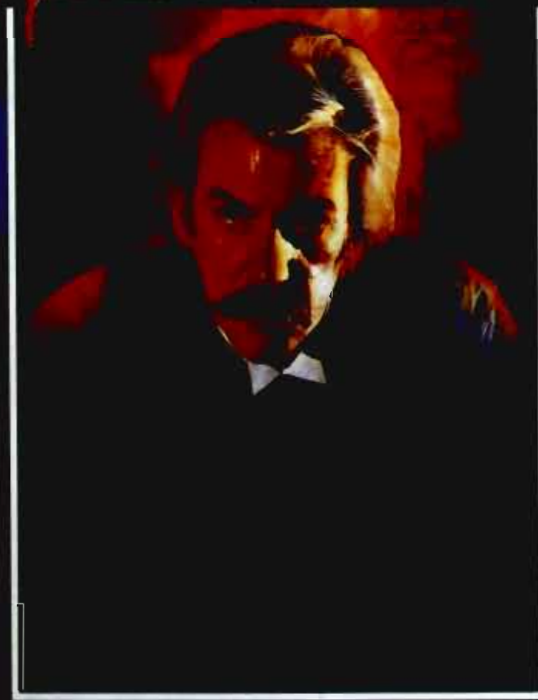


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Publisher's Letter

With Sears' massive overhaul, it's Christmas in television land

In its move to restructure itself to compete with the K Marts and Wal-Marts in the general merchandise field, Sears Roebuck may be downgrading itself in terms of quality image, but strangely enough it will be trading up in the area of advertising media. Starting with the upcoming Christmas selling season, Sears will be making a dramatic shift from radio to television. Two driving forces are behind this. One is a realization that the same discount department stores that have been biting into Sears' pie have been doing it largely with the help of TV. The other is a massive sales effort over last summer out of Television Bureau of Advertising's Chicago office.

Industry observers in recent years had been amazed by the heavy amount of emphasis Sears had placed on radio. For 1987, Sears actually spent more on network radio alone than it spent on all television—network, spot and local combined. In addition to an estimated \$100 million spent in daily newspaper advertising in '87, Sears spent \$96 million in recorded media—including \$39 million for all TV, \$42.5 million for network radio (inclusion of local would probably bring radio up to \$80 million), \$9.5 million in magazines and \$4.4 million in newspaper supplements.

The competition. Sears executives reportedly were surprised when TvB showed them what their competitors were doing. For example, J. C. Penney, in media measured by Leading National Advertisers and Broadcast Advertisers Reports, showed up as spending 82% on TV, 13% on magazines, 4% on network radio and 2% on other media. Meanwhile, K Mart had cut back from two to one newspaper inserts per week, putting the money saved into TV and the bank. Trade sources estimate it dramatically increased its TV exposure while saving \$25 million in a year.

Representative of the new kids on the block that Sears has come to fear and soon may be emulating, Wal-Mart is putting 100% of its measured media dollars into TV. In virtually every market the discounter hits with TV advertising, its spending on TV represents about 50% of that done by all major general merchandise chains.

Sears' shift in emphasis to radio came about in 1984, when it shifted its apparel and corporate business from Needham, Harper & Steers to Ogilvy & Mather, which already had its hard lines. NHS had been heavily TV oriented, but, with O&M involved, the shift to radio was dramatic.

The philosophy behind radio was that it could be used in combination with newspaper advertising on a timely and inexpensive basis for sales events. Whether it got a better response for the dollar with radio will long be the subject of debate between the respective proponents of radio and TV. But if Sears goes, as announced, to a policy of "everyday low prices" vs. sales events, it all becomes a moot point. It appears the TV industry has made its big sale to the nation's biggest user of radio. Now the hard fight is ahead.

Arj. Paul

A man who's seen it all sees something new.

Sunday, October 2, 1988

The Washington Post

As the Networks Try
To Pick Up the Pieces
Of a Strike-Stricken
Schedule, a Few Bright
Newsworkers Stand Out
Amid the Usual
Suspects: Herewith, a
Sampler of the Fall

By Tom Shales
Washington Post Staff Writer

Television '88: At Long Last, The New Season Begins

New CBS Series

"**Simply Brown**" (Monday, 8:30 p.m.). She's sexy, she's savvy, she's just back from a month at the Betty Ford Clinic. Candice Bergen makes a very stylish TV series debut as Ms. Brown, star reporter, for the "FYI" network magazine show. Her foils include a former Miss America booked as a coanchor even though she's so dumb "she thinks Camus is a soap." Bergen is golden. (Nov. 14.)

"**Almost Grown**" (Monday, 10 p.m.). Sessie and Norman were lovers. But not at first. And not anymore. One of the season's rare departures from form and formula, "Grown" charts the ups and downs of a young New Jersey couple through three interlocking time frames: 1962, when they meet; the late '60s, when they live together; and today, as their 16-year-marriage lies in ruins. Rock music plays a big part in their lives—from "26 Miles" on the car radio in '62 to an aspiring '80s band called Airport Lobsters. The leads, Eve Gordon and Timothy Daly, are wonderful; the show is worth a peek, maybe even a look. (Two-hour "preview" Sunday, Nov. 27; premieres Nov. 28.)

"**TV 101**" (Tuesday, 8 p.m.), arguably the most ambitious new series, is part of an effort to retool the stodgy CBS image along youthier lines. Kevin Keegan (Sam Robards), adviser to the Roosevelt High School newspaper, encourages students to produce a video version instead. The pinhead principal hates it; the kids come alive through it. Tape inserts of the student show are mixed in with the filmed drama. Smart, hip and original. (Nov. 29.)

The man is Tom Shales,
this year's Pulitzer Prize winner
for television criticism.



Final Edition

Indies clean up on election night with blockbuster films & miniseries; West Va. ads a national low point

Campaign '88 was highlighted by negative advertising, a disinterested electorate, a handful of TV affiliates more interested in their bottom line than the White House line and independent stations cashing in with big movie titles.

Perhaps the most negative ad was an antiabortion spot run in West Virginia by Republican contender Jay Wolfe. The TV spot showed a bloody fetus alongside a photo of Wolfe's opponent, Sen. Robert Byrd, the Senate Majority Leader. Byrd won easily.

The controversial spot was pulled Nov. 2 when the Senate Republican Campaign Committee refused to pay for its airings. But Wolfe then put up his own money and by Nov. 3 the spots were back on the air.

At WVVA-TV Bluefield, W. Va., Ricky Ellis general sales manager, called the antiabortion spot "absolutely the most negative political ad I've seen in my life." Despite complaints from viewers, WVVA was advised by the NAB to "follow the letter of the law" and continue running the distasteful spot, she said, adding "It's a very scary direction for politics and broadcasting to go in." She thought it was "unfortunate" that stations cannot legally reject such offensive political spots.

Web defections. As for network coverage of the election returns, three network affiliates had decided to just say no and instead fill

George Newi



their coffers with local ad revenues from movie substitutes, as independents do opposite the networks' election and convention coverage.

Two of those affiliates—WUHQ-TV Battle Creek, Mich., and WBAK-TV Terre Haute, Ind.—changed their minds five days before election day and carried the Peter Jennings-anchored telecast. Network TV is faced with gradually growing affiliate preemptions nowadays, but George Newi, ABC's vice president of affiliate relations, said, "We pointed out it's their civic duty [to carry the election coverage] and it's like the flagship of the network news operation."

WBAK had planned to run *The Man Who Lived at the Ritz*, a Harmony Gold-syndicated two-parter, as a four-hour special. Instead, said Linda Snyder, general manager, that was reset for Nov. 5, bumping ABC's lackluster Saturday roster. WUHQ had planned a lineup of off-network sitcoms such as *Cheers* and *MASH*.

Snyder said the initial decision to preempt ABC had been made "at least three months ago," largely because viewers there "don't turn to us for news" because the station lacks a news staff. WUHQ also has no local news presence to report local vote updates during ABC's seven-minutes-per-half-hour windows for local coverage. ABC instead provided "fill" in the form of state races, Snyder noted.

In 1984 ABC's election night had 99.4% coverage, Newi noted, and 98.7% in 1980. Only WKAB-TV Montgomery, Ala., preempted in 1984, joined in '80 by the Terre Haute and Battle Creek outlets, he said.

CBS' KMEG-TV Sioux City,

"We pointed out it's their civic duty" to carry the election coverage.

"It was absolutely the most negative political spot I've ever seen."

Iowa, which also preempted in 1984, is another station without a local news staff to cover local races. The film *Where Eagles Dare* ran last week.

At NBC, affiliate execs said there were no affiliate dropouts but some "breakaways" for extensive coverage of local issues on the ballot.

Indies make hay. Indies counter-programmed the Bush-Dukakis vote coverage for all they were worth with big-name movies and miniseries, including a hybrid of both forms in Paramount's *The Godfather Saga*, said Jack Fentress, vice president and director of programming at Pety Television.



Paramount's *The Godfather Saga* aired on many independent stations on election night.

At MMT Sales, Matt Shapiro, vice president and director of programming, said *The Godfather* four-parter opened on "at least four" MMT-repped stations on Nov. 8 because "they know they're going to get a huge audience."

Other indies' titles ranged from *Superman* and *The China Syndrome* to *The Money Pit* and John Wayne's *Rio Bravo*. Several MMT stations also ran "double features," such as *The Blues Brothers* and *Neighbors* and *The Breakfast Club* with *The Buddy Holly Story*.

—Jim Forkan

Subscriber barriers to cable TV described in major Bruskin study

Described as a landmark project, an R. H. Bruskin Associates study of the status of cable TV in U.S. households has uncovered the following:

■ Most of the non-subs passed, which is where most of cable's major growth must come from, are not inclined to subscribe for a variety of reasons, "not the least of which is lack of knowledge about costs and programming."

■ More than 10% of current subscribers have cancelled cable television at their current address "primarily because of disappointment over what cable TV is offering them."

■ Recent subscribers to cable are not only demographically different from the majority of longer-term subscribers, "but their needs and desires are different, as well."

■ "Pay cable is in turmoil." The reason that churn is "quite high" is that, "with few exceptions, no major pay cable channel has yet successfully differentiated itself from

the competition."

■ The reason that many price promotions fail is that the cost of cable "is not the major deterrent to subscribing among major segments of non-subs passed."

Heap big study. The bruskin study was conducted last spring and consisted of more than 2,000 interviews in the home. The full report, *Inside Cable-TV*, offers more than 250 pages of analysis and tabulations.

In comparing the new and longer-term cable households, the study found that the latter tend to be older, married, higher-income families while the industry's major growth is now coming from "younger, single, lower-income renters, nearly half of whom have children under 18."

In studying the fractionalizing of viewing, the study found fewer than 30% of TV sets in children's rooms are capable of receiving MTV or Nickelodeon. To view

these channels, children must watch other sets in the household. "Thus advertisers must carefully consider not only the cable channels they select for their products, but the time slots as well."

Rosy forecast for TV & cable in Blair study

A comprehensive forecast of the TV industry, which peers into the first half of the next decade, sees a healthy future for TV stations, basic cable networks and barter syndication (see story, page 55). It also predicts a continuing important role for the networks, but on a diminished scale.

The 86-page study, prepared by the consulting firm of Wilkofsky Gruen Associates, is sponsored by Blair Television and Smith Barney Harris Upham & Co.

The study projects ad revenue on TV stations increasing by \$16 billion over the next eight years, reaching a total of \$30 billion by 1995.

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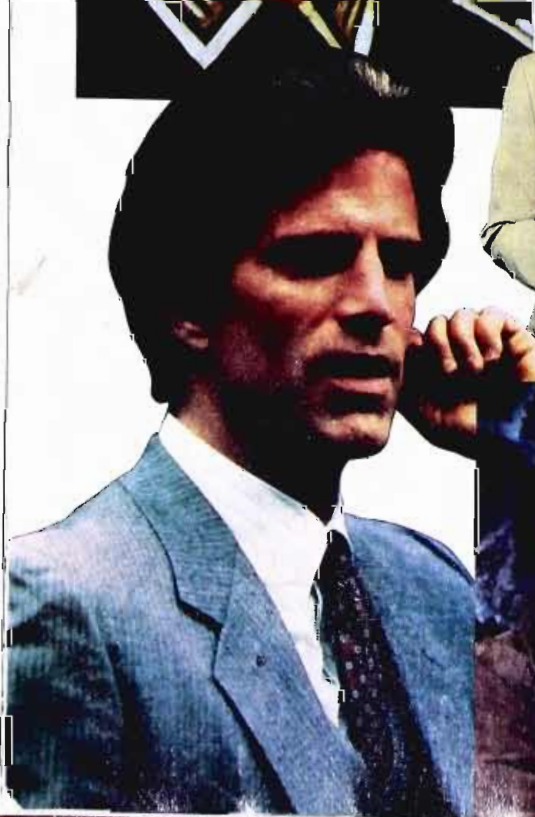
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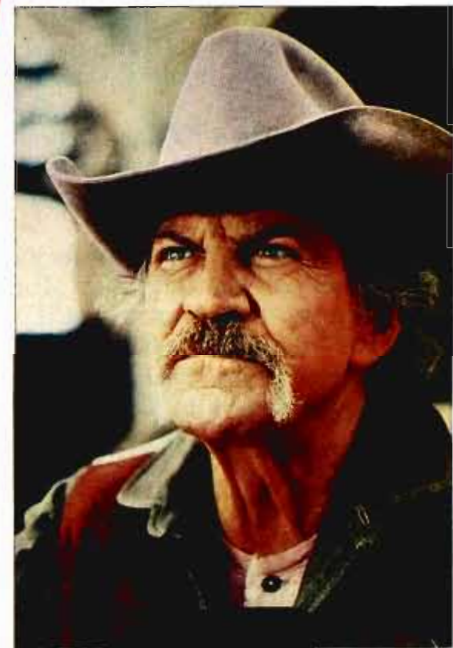
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ABC O&Os boost 'Remembrance' mini with local news tie-ins

The ABC-owned TV stations, criticized for linking news features to *The Winds of War* miniseries five years ago, are doing the same thing with *War and Remembrance*.

This time, however, executives at WABC-TV New York, which produced the so-called "mini-documentary" segments for the stations' local newscasts, are gun-shy about discussing the entertainment-linked project. The segments, WABC officials claim, do not focus on the miniseries but rather use the TV event as a way of sparking viewer interest in events of nearly five decades ago.

Bill Beutel, the veteran *Eyewitness News* anchor on WABC, is the featured reporter on the segments, as he was in 1983. The briefs, entitled *Portraits in Remembrance*, will each run three or four minutes.

Local news. The featurettes will run in local newscasts from Nov. 13 through Nov. 18, although the first 18 hours of the \$110 million World War II epic will not conclude until Nov. 23.

Beutel and a TV crew visited Poland and other European sites to explore wartime battles and the holocaust with survivors.

Although *War and Remembrance* will continue with 14 more hours in the spring, and although 1989 will mark the 50th anniversa-



ABC O&O stations will use news-features to promote "War and Remembrance."

ry of the start of World War II, a spokeswoman for WABC said "there's nothing I know of" in the planning for yet another news tie-in package.

All three networks' O&O groups have done similar news-feature reports keyed to miniseries, such as ABC's *Roots*, NBC's *Shogun* and *Holocaust* and CBS' *Ellis Island*.

Joslyn links with Camelot

Joslyn Entertainment, new Burbank-based syndicator, has signed a three-year contract with Camelot Entertainment to handle domestic

barter sales for its live specials called "Super Events."

Joslyn was formerly Westgate Productions, where owner, John Joslyn, produced two specials, *The Mystery of Al Capone's Vaults* and *Return to the Titanic... Live*.

"Super Events." Four shows being developed under the "Super Events" banner have been bought by the Gaylord station group and five Fox TV stations in Chicago, Los Angeles, New York, Washington and Boston. The first special, *Treasures of the Third Reich*, will bow next April, with the others planned for June, October and December. International Program Consultants is handling overseas station clearances, with Joslyn indicating foreign sales will be handled jointly by Camelot "and a station group not yet appointed." The Berlusconi Group in Italy is the first overseas station owner buying the series.

Joslyn claims to have 25 specials in development.

Arbitron Hispanic radio diaries decline

For the second consecutive survey, Katz Hispanic Radio has found Arbitron in-tab diary levels for Hispanics have declined. The analysis covered the summer '88 survey. A similar decline was uncovered in the Arbitron spring '88 survey.

Katz said because of the increase in general market response rates, Arbitron had, over the past year, decreased the overall sample, starting with the spring '88 survey, "to bring market sample sizes closer to market objectives."

With the lower overall sample in the spring '88 survey, Katz noted "sharp declines" in the total Hispanic sample. In the summer '88 study, Katz found that 11 of the 19 Hispanic weighted markets fell below the summer '87 sampling levels and nine show further decline from the spring.

Among the significant declines from summer '87 to summer '88 were: Austin, 42%; Dallas-Ft. Worth, 32%; El Paso, 20%; Los Angeles, 14%; McAllen-Brownsville, 25%; San Antonio, 19%; San Francisco, 17%; San Jose, 11% and Tucson, 12%.

Lower sampling levels result in higher fluctuations among Spanish stations, points out Janet Therrien, associate research director of Katz Hispanic Radio. Also, fewer diaries mean less chance of a station being mentioned.

(Final Edition continued on page 18)

Q. How do you out-talk

Oprah Winfrey

Phil Donahue

Geraldo Rivera

Sally Jessy Raphaël

Morton Downey Jr.?

RAB search for Stakelin successor; ex-Viacom execs looking for outlets

Members of a search committee to help pick a successor to William Stakelin as president/CEO of RAB have been named by the bureau's chairman, James Arcara, president of Capital Cities/ABC Radio.

As previously indicated, veteran broadcaster Richard Chapin will chair the committee. Chapin, the only man to have served as both RAB and NAB chairman, is now a broker with R. C. Crisler & Co. in Lincoln, Neb. Candidates for the RAB presidency should contact him, said Arcara.

Joining Chapin on the search committee are Rick Buckley, president of Buckley Broadcasting; Steve Berger, president of Nationwide Communications; Michael Lareau, executive vice president of MGM/UA Communications, and Dean Sorenson, president of Sorenson Broadcasting.

Stakelin resigned his post Nov. 4 following a half-hour conference call with members of the RAB executive committee. He has been president since July 1983 and will remain in the job through January to help in the transition.

Stakelin resigned to become president/CEO of a new company, Apollo Radio Ltd., which has been set up by three former executives of Viacom—Terrence Elkes, Kenneth Gorman and George Castell. Apollo Radio, established to acquire and



Bill Stakelin

manage a "major" group of radio stations, is a subsidiary of Apollo Partners Ltd., a privately-held investment company.

Apollo Partners was formed late in 1987 after the trio left Viacom International—where Elkes was president/CEO, Gorman, executive vice president, and Castell, a senior corporate officer—following a takeover battle won by Sumner Redstone and his National Amusements Inc.

Shortly thereafter, Apollo Partners acquired IDC Services in a \$62 million buyout in which Apollo put up 60% of the equity and Equitable Capital Management, 40%. IDC, an

"When I came to RAB, I told them that restoring its credibility would take five years. I stayed five-and-a-half."

information systems company, consists of Talent & Residuals Inc., Central Casting and ASI Market Research. It recently helped set up a joint venture embracing T&R and Donovan Data Systems.

Apollo Partners is expected to announce major additional Wall Street funding in a few weeks.

As for Apollo Radio, Stakelin said the company will be looking at markets 20 to 150 for stations with a good cash flow. "But we're not afraid of a turnaround situation if it comes up," he added.

Castell made clear that Apollo Partners is also interested in TV stations and pointed out that he and his partners acquired a total of 17 TV and radio stations while they were at Viacom. "We took Viacom into the broadcast business," Castell declared.

Stakelin maintained he is leaving RAB in good shape, with membership and budget (\$6 million) at an all-time high. However, he never lost his interest in running a radio station group, he said. "When I came to RAB, I told them that restoring its credibility would take five years. I stayed five-and-a-half."—**Al Jaffe**

Meters rattle Minn.-St. Paul

The Nielsen metering of Minneapolis-St. Paul has, as usually happens with metering, shaken up affiliate and independent shares, with affiliates generally hurt and independents generally helped.

Nielsen kicked off metering in the DMA during October, making the market its 17th to be converted to electronic ratings.

As evidence of the boost given to indies by metering, Stuart Swartz, vice president and general manager of KMSP-TV, channel nine, displays October shares showing substantial increases for his station in almost every key daypart.

In the 3-5 p.m. weekday daypart, KMSP-TV moved up from the No. 4 to the No. 2 station, its share rising from 12 to 20, or 67%. The former ABC affiliate (it lost its affiliation in 1979) earned a share of 23 in the 5-6:30 weekday period, a climb of 77%.

Other major increases in KMSP-TV shares were at 10 to 10:30 p.m. weekdays, up from 3 to 10; at 7 to 9 p.m. weekdays, up from 5 to 13, and at 10:30 to 11:30 p.m. weekdays, up from 5 to 11.

In primetime, KMSP-TV climbed from a 5 to a 12 share, but one of the affiliates also went up: WCCO-TV, a CBS outlet, rose from a 20 to a 24 share.

Granite looking toward expansion

While F. Robert Kalthoff, president of Granite Broadcasting's Midwest Television Group, shores up operations at the new firm's first two stations, principals Donald Cornwell and Stuart Beck are looking at several other acquisition possibilities. Kalthoff says they're all affiliates and primarily in markets above the 50th.

Meanwhile, Kalthoff reports there will be greater emphasis on news, weather and sports at KBJR-TV Duluth and WEEK-TV Peoria.

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On-the-scene newshound gives KCBS-TV its exclusives

Dave Lopez is sitting in a coffee shop in Anaheim, waiting for a call from a source who promises to give the KCBS-TV Orange County correspondent exclusive information about a murder story Lopez has been working on since last July.

Receiving exclusive tips from sources around Orange County, the sprawling region south of Los Angeles which Lopez, 40, has been covering for Channel 2 for 10 years, is one of the rewards for being television's dean of Orange County newspeople.

The long haul. For while KNBC-TV, the NBC-owned station and KABC-TV, the ABC O&O, have had different correspondents working the beat, Lopez has scoured the region with its 69 separate geographic regions, 27 separate cities and 2.2 million population since June 12, 1978.

"People know me because I've been doing this so long," Lopez said while formulating his plans so that once the call came through, he could make that evening's newscasts.

This was a case in which Westminster Police shot and killed a 17-year-old male in a darkened alley adjacent to his residence. Police

claimed the shooting was justified; witnesses call it murder. The police had refused to name the officer who did the shooting. Lopez said he had been given the officer's name by several sources, and would reveal it for the first time.

That morning he was to be given new, possibly incriminating facts about another incident involving this officer. He had already done eight stories about the shooting and the Hispanic community's displeasure with nothing happening to the policeman who took the Fifth Amendment at a grand jury hearing.

Lopez said he would go to the police station to again ask to see the chief and inform him he knew the name of the officer who did the shooting and also had information about this same officer being involved in another physical altercation with someone else.

Then he'd go to an attorney's office to meet the man who claimed he was roughed up by this cop two months before the shooting. He'd also go to the neighborhood where the shooting took place and do his standup for the camera crew which was coming from L.A.

On this Friday, Lopez's contacts and hustle paid off. His story was

teased as an exclusive report prior to the 6 p.m. *Action News*, and it was the lead story on the broadcast, with coanchor Penny Griego introducing Lopez's story which ran around 3:55 and later, condensed, on the 11 p.m. news.

In the piece, Lopez appeared on-camera three times—interviewing the man who charged he was beaten up by the officer while being taken in for a traffic violation, and two other times on the tree-lined Westminster street where the shooting of 17-year-old unarmed Frankie Martinez took place.

Lopez stressed the exclusivity of the information, and had the new

Lopez took heat from the media when he divulged a mass murderer's off-the-record admission of guilt on the witness stand.

witness and his attorney on-camera. There was also file footage of police cars on the street the night of the shooting and of angry pickets in front of the grand jury building protesting the lack of action by the police. Lopez also revealed a woman on that picketline found a threatening note on her car windshield and that the Martinez family would be filing a \$110 million lawsuit against the officer, the Westminster police and the city.

On the record. Lopez said, pulling out his calendars in which he's got marked down all the stories he's covered and which ones aired live, he's done 44 live reports as of mid-October, 360 last year and close to 2,000 live reports during his 10 years on the beat.

Lopez admitted that when he got started in Orange County, "every-

(News About News continued on page 124)

Dave Lopez, Orange County correspondent for KCBS-TV, broadcasts from the site of the 1986 Cerritos air tragedy. He and other members of the news department received an 1987 Emmy for that coverage.



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Sidelights

McDonald's 'When I Grow Up' campaign urges youngsters to stay in school

McDonald's Corp., sponsor of the *When I Grow Up* vignettes urging youngsters to stay in school, is planning another batch to air next season.

Tom Avitabile of Market Base Communications, New York, who wrote, directed and edited the 22 60-second program featurettes over a six-week span last summer—on a \$330,000 budget—said McDonald's has ordered two more 60s to run later this season.

Shooting 10 more 60s. With those two now in preproduction, Avitabile and McDonald execs are already talking about shooting 10 more 60s that would be sprinkled among the first 22 episodes to "sweeten the mix" in the 1989-90 season.

The 60s—including a five-second tag that says, "Sponsored by McDonald's. We hope you always keep reaching for your dreams"—air only on Saturday mornings on CBS-TV, at 11:28 a.m. That put them at the end of the new series *Hey Vern, It's Ernest* until Oct. 29, when that show swapped places with *Mighty Mouse*.

Tom Avitabile



The public service drop-in vignettes, each of which will run twice this season, feature real people talking about their own careers and mentioning the importance of such school subjects as math, English and science.

Based on an idea by Vicki Vitale, founder of Four Star Management, who was executive producer on the series, *When I Grow Up* went into production last July, after two years of negotiations and echelons of approval at McDonald's, its ad agency Leo Burnett USA and the CBS Television network.

No cue cards. Using friends and business contacts, Avitabile's staff initially contacted 1,200 vignette prospects, then whittled that down to 275 who had unusual occupations and enthusiasm for their work. Ultimately, 75 finalists were videotaped in what Avitabile dubbed 2½-minute "talking Polaroids." Due to the budget limita-

The vignettes feature real people talking about their careers.

tions, all shoots were limited to a 90-mile radius of New York City. Among those cut, he noted, were 30 female airline pilots whose fathers also were pilots.

The director let the people talk in their own vernacular and without cue cards, with the only proviso being they gear their remarks for a nine-year-old. Even the visuals are shot by a camera positioned at the eye level of such a youngster, he observed.

After the first 13 spots were done, McDonald's revised the ethnic makeup to include more minorities such as a black electrician (shot at Shea Stadium), a black state trooper, a female photographer of American Indian ancestry, a male Oriental veterinarian (done

Avitabile produced an international version showing less on-camera speaking, so dubbing is avoided.

at Belmont Park racetrack) and a female Hispanic who works as a bank loan officer.

Shelly Strickler, a radio reporter for WOR(AM) New York, is one of those featured in the package. She describes her job as "one of the most exciting in the world."

Each vignette opens with a child singing, "When I grow up," then another saying, "When I grow up, I want to be a (reporter)." The camera shows a child putting finishing touches on a drawing illustrating that occupation. All these "intros and outros" were done in a single day, Avitabile noted, adding the drawings actually were done by an artist at Creative Ways, New York.

School video due. In January, a videocassette version will be distributed to elementary schools for use with a related teachers' guide for classroom discussions. About 400,000 "When I Grow Up" guides have been prepared by CBS, featuring McDonald's golden arches logo on the cover. Eventually, the featurettes will be made available locally to McDonald's franchisees.

An astronaut is one of the careers in the package. McDonald's, also a longterm corporate sponsor of the Young Astronauts Council, Washington, which seeks to interest youth in space-leveled careers, will mail an educational packet to schools on that in March.

Avitabile also has produced an international version of the 22 briefs for eventual use by McDonald's overseas. These show less on-camera speaking, so that voice-overs can be added instead of dubbing.

The director, who would like to see these vignettes run in prime-time as well as Saturday mornings, has been approached by unspecified companies about doing a similar project for high school students, this time as a weekly half-hour series.—**Jim Forkan**

USA web hosts juvenile diabetes telethon Nov. 27

Steve Bleetstein, supervising producer of the Juvenile Diabetes Foundation's live Thanksgiving weekend telethon, has been doing preproduction work for the event since Sept. 1.

From then until now, he has been developing pretaped celebrity segments, such as one just done with Stevie Wonder and updating medical segments shown on JDF's first telethon last year.

JDF said the telethon—two thirds of which is live—raises money for research into a cure for insulin-dependent juvenile diabetes, while also educating viewers about a disease that affects 11 million Americans.

The group hopes to raise "substantially" more than last year's \$3 million.

The event itself will be cablecast live by USA Network on Nov. 27 from 7 p.m. to 1 a.m. The telethon's title, "Thanks for Giving," was chosen because it airs at the end of the Thanksgiving holiday weekend.

USA donates the time, deleting all network and local commercial availabilities. Were JDF to pay for that time and other costs of the event, it would probably top \$5 million, Bleetstein estimated. He and his staff of six work below their normal rates, as does Editel, New York, graphics and postproduction house that did the graphics and promotion spot for the event. The stars donate their fees.

Months before air date, the telethon had commitments from such corporate sponsors as Alberto-Culver, Days Inns of America, Nabisco Brands and Worlds of Wonder, which help defray the nearly \$1 million in production costs. In return, these sponsors each get a two-minute segment to explain their participation in JDF's fundraising efforts.

Bleetstein, besides supervising the scripting and editing of pretaped footage, will coordinate the technical aspects at the Sheraton Universal hotel origination site in Universal City, Calif. He also stays in touch with those seeking to get

firm commitments from Frank Sinatra (for a pretaped segment), Linda Ronstadt, Alabama and others (for the live portion).

Moreover, Bleetstein has been working with Caleb Weinstein, computer artist at Editel, on the thematic "Gift of Hope" introductions to various pretaped JDF chapter sequences and a promo spot. USA, meanwhile, lately has been working on its own adaptation of the promo, to include photos of celebrities as they are committed.

Rehearsals will take place on

Nov. 23, 25 and 26 and on the afternoon of the cablecast, Bleetstein added. Arthur Forrest, a veteran of Jerry Lewis' Labor Day telethons for Muscular Dystrophy Assn., is this telethon's director.

JDF's event does not include plans for live cutaways to New York and other cities the way Jerry Lewis' does, Bleetstein continued. It will do some remotes from around Hollywood, however, including pickups from the Hollywood Parade, where Joan Van Ark will be on a JDF float.

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TV Business Barometer

Local September billings: +15.8%

Local TV billings took a sudden jump in growth in September, hitting the double-digit neighborhood in percentage terms, according to the *TV Business Barometer* sample of stations.

The increase was the biggest percentage jump this year and actually the biggest since late 1986. It appears that the summer Olympics and the political campaigns are having their impact, though responses by sample members do not usually explain their numbers.

In any case, local billings rose 15.8% for the last month of the third quarter, which beat the two opening months of the year, the biggest previous periods. At that time, local time sales rose 12.9% in January and 12.7% in February. There have been no other double-digit increases this year so far. Last

year, there was only one double-digit rise—10.1% in September.

The biggest previous rise since this past September was back in October 1986, when local billings were lifted 16.9%.

The September local increase was considerably higher than spot's, which rose 6.9%, not too bad during spot's doldrums. Local dollar volume in September was also higher than spot's. The estimated local figure was \$597.6 million vs. \$557.4 million for spot.

Estimated local billings for August were \$504.6 million.

Large increases in year-to-year time sales are often due to cases where the current year is a five-week Standard Broadcast Month (SBM) and the year-ago figure is four weeks. However, that did not happen this time around; both Septembers were four-week SBMs.

September's local billing made the third quarter the best three-month period of the year, though

not by much. The third quarter was up 10.0%, compared with 9.9% for the first quarter and 8.1% for the second quarter.

Total local billings for the quarter were \$1,538.4 million, which topped spot's \$1,527.0 million.

As for the nine months, local business was up 9.3%, with total time sales of \$4,341.9 million, compared with \$4,472.8 million for spot.

Network comp

A breakdown of the September local figures by station revenue bracket shows that the medium-size stations did very well (up 21.3%), the larger stations did well (plus 14.8%) and the smaller stations did so-so (up 8.3%).

Network compensation was down in September for the fourth month this year. It was off 2.0% to \$36.6 million. For the quarter, network comp was down 0.9% to \$116.0 million and for the nine months it was off 0.3% to \$343.4 million.

September

Local business +15.8%

(millions)

1987: \$516.1 1988: \$597.6

Changes by annual station revenue

Under \$7 million	+8.3%
\$7-15 million	+21.3%
\$15 million up	+14.8%

Network compensation -2.0%

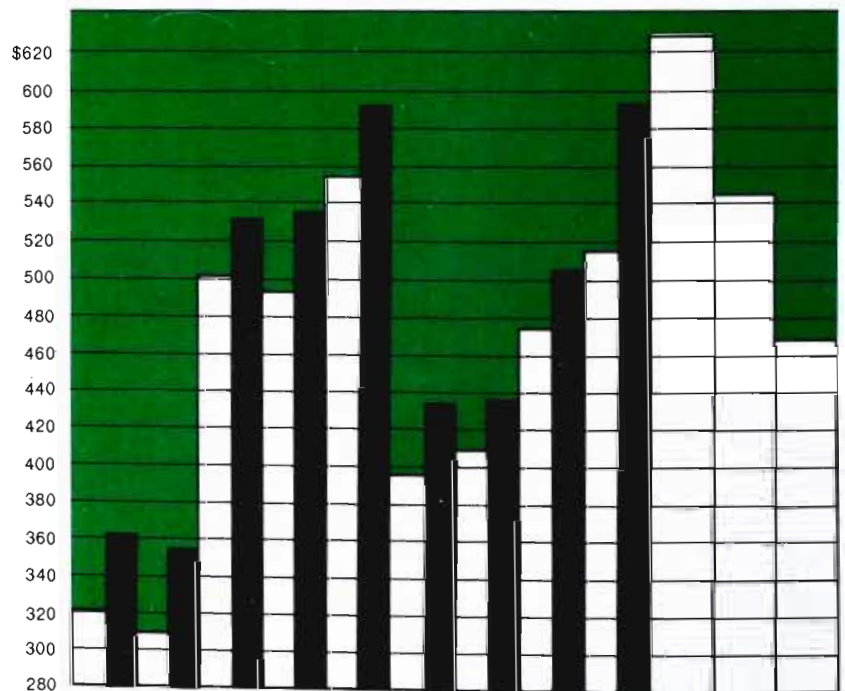
(millions)

1987: \$37.3 1988: \$36.6

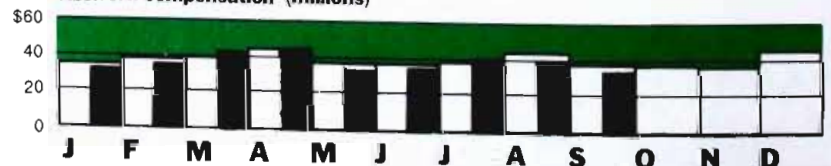
Changes by annual station revenue

Under \$7 million	-1.8%
\$7-15 million	-4.8%
\$15 million up	-1.0%

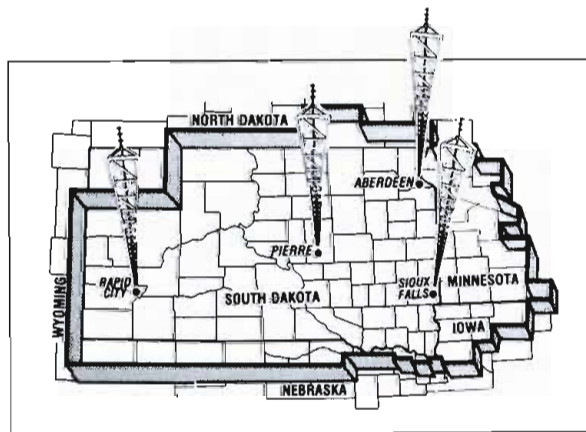
Local (millions)



Network compensation (millions)



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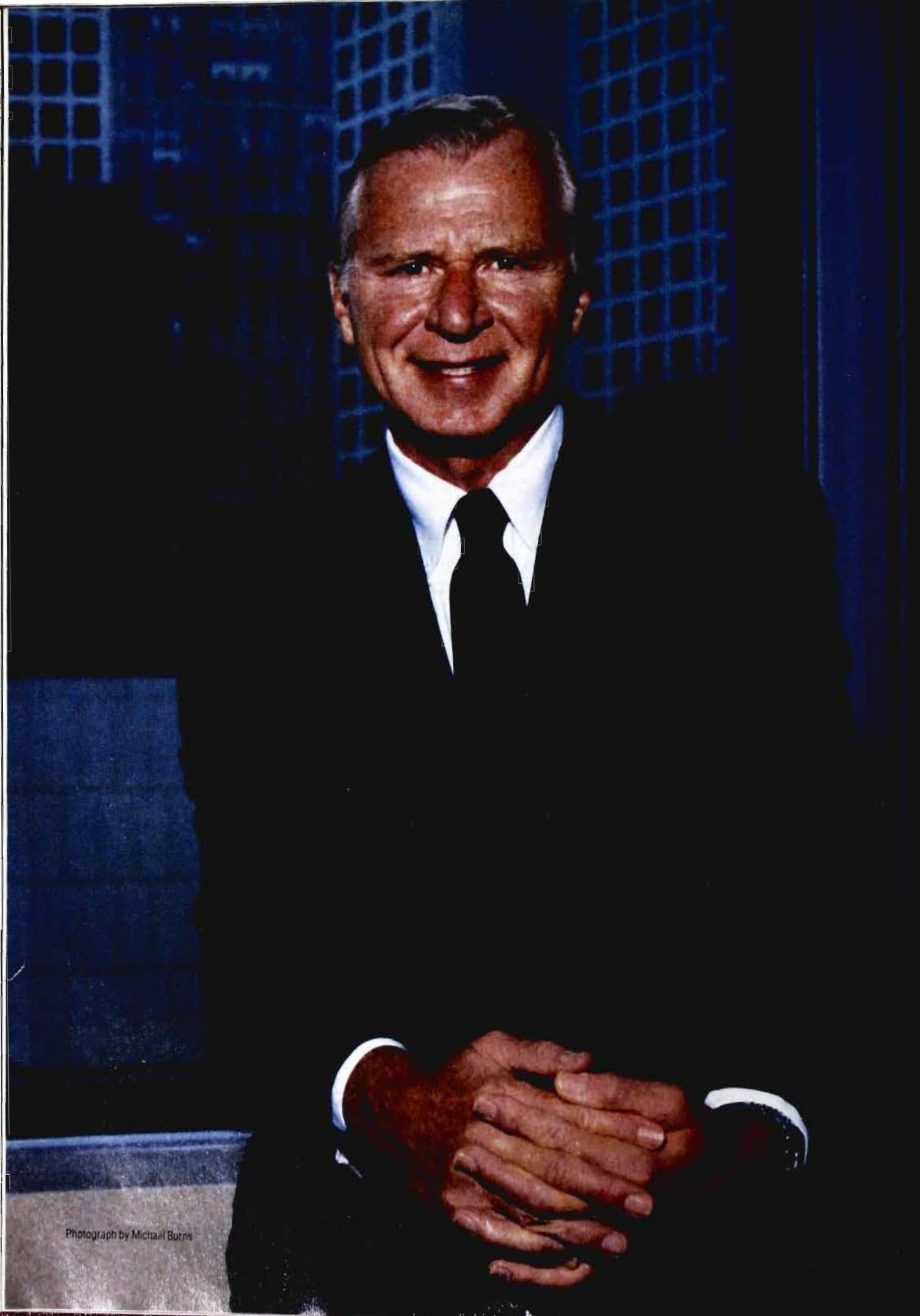
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Harry's said that "being a smart salesperson doesn't require a special personality and it doesn't require brilliance. Anyone can do it if you try."

However, it certainly didn't hurt being Smart.



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International Report

CBS Broadcast International survives budget jitters and political sniping to remain independent from CBS News

CBS Broadcast International, which has had a rocky road as a separate operating unit of the CBS Broadcast Group, has survived yet another brush with fate and will continue life as the company's international conduit.

CBI's future apparently was resolved during an Oct. 27 meeting between CBI vice president/general manager Don Wear and CBS Broadcast Group's new president Howard Stringer. "Our mission remains intact; if anything it has been strengthened," said Wear. "Our development budget has even been doubled," he claimed.

Stringer, the former president of CBS News, was being lobbied by some of the news division's old guard—Joan Showalter and Sam Roberts—to dismantle CBI and shift it back into CBS News, where it originated in 1981. With a good chunk of CBI's programming coming out of CBS News, it appeared for a time this argument was making headway with Stringer.

Further compounding Wear's troubles is his new relationship with Stringer. Wear's mentor, up until CBS president Larry Tisch shook up the Broadcast Group last August, was Gene Jankowski, whom Stringer succeeded.

"Don was Jankowski's man,

Art Kane, former head of acquisitions and development at CBI, is credited with bringing a lot of new business into the company.



there was never any doubt about that," said one CBS insider. And Jankowski was a big fan of CBI; after all it was his idea to move it out of CBS News and make CBI a separate operating unit in 1981.

Start from scratch. So Wear had to start from scratch with Stringer. But Wear had at least two things working in his favor when the political sniping opened up from across



Don Wear, head of CBS Broadcast International, now has hands-on responsibility for program development and acquisitions.

town at CBS News. First, the new president of CBS News, David Burke, appeared to be taking a neutral position in the squabble. Second, the financial success of CBI is now pretty much in its own hands in terms of product. Instead of relying chiefly on CBS News programs to sell overseas, CBI has had some success with coproductions such as *Twilight Zone*, *Katts and Dogs* and *Reaching for the Skies* and acquisitions including *Blue Blood*.

"I think Howard is very enthusiastic about the things we're doing," said Wear, who sees CBI's future



Howard Stringer, president of the CBS Broadcast Group, resisted pressure to fold CBI into CBS News.

connected to its ability to coproduce and acquire programming, not as relying chiefly on CBS News product.

Wear wouldn't comment on the sniping from CBS News or on the move to fold CBI under the News banner. He called the meeting with Stringer "part of the normal budget review process."

Poor things! While the U.S. networks are limited in what they can produce and sell domestically, there are virtually no limitations on their international operations. However, while the major U.S. program suppliers such as the Hollywood studios or big independents like Worldvision, can rely on extensive libraries to fuel international sales, the Big 3 networks are small-fry, scratching and clawing just to make a buck. So it's fairly common along network row that the Big 3 reevaluate these marginal operations.

Among the issues facing Stringer as he went into the budget meeting with Wear were not only moving the whole ball of wax into CBS News, but whether or not to slash the development budget altogether and make CBI simply a sales office.

Wear came out of the meeting with both his job and CBI intact. But Art Kane, CBI's vice president for acquisitions and development, didn't fare so well. He was let go. "I

am now handling these operations directly," said Wear.

Kane had been with CBI since it was formed in 1981, hired by John Eger, former head of CBI and now a consultant. Kane and Wear had an estranged relationship, with both executives often doing the same job.

"Art Kane was the first executive I hired and the best," said Eger. "He has a smart nose for product. He was the one who set up the China deal which really launched CBI."

Under the new organization, Wear remains head of CBI and takes hands-on responsibility for bringing in new business. Rainer Siek is vice president, sales and marketing; and David Berman is in charge of operations.

It appears that Stringer has given Wear and CBI a year's grace.—

Jack Loftus

Int'l Emmys choose from 15

The 16th annual International Emmy Awards gala scheduled Nov. 21 at the New York Sheraton Center will select winners from a list of 15 programs representing the best in TV production from the international community.

The nominees for drama are Channel Four Television, U.K., *A Very British Coup*; London Weekend TV, U.K., *The Charming*; and Revcom, France and Australia, for *Captain James Cook*.

In performing arts, the nominees are London Weekend TV for *ABC of British Music*; the BBC U.K., for *Facade*; and the BBC for *A Simple Man*.

Popular arts: BBC for *Yes, Prime Minister*; Yorkshire TV, U.K., *The New Statesman*; London Weekend TV, *Eric Clapton*.

Children's programming: Australian Children's TV Foundation, *Captain Johnno*; Canadian Broadcasting Corp., *Degrassi Junior High*; Channel Four TV, *East of the Moon*.

Documentaries: Television Espanola, S.A., Spain, *La Ley de la Palanca*; TROS TV, Netherlands, *The Last Seven Months of Anne Frank*; Channel Four TV, *Baka—People of the Rain Forest*.

U.S.-based LBS and U.K.'s Granada TV sign distribution & coproduction pact

LBS International has signed an agreement with Granada Television under which the British broadcaster will handle the U.S. distributor's product in the U.K., Ireland, Scandinavia, the Benelux countries and Portugal.

Phil Howort, president of LBS' international operations, is also moving to strengthen the company's sales forces around the globe by hiring reps to sell LBS product in Germany, France, Spain and Italy. That's generally the way U.S. distributors begin to make headway in the international market, the next step being the opening of their own sales offices.

LBS is a relative newcomer to the international market, and the deal with Granada should pave the way for several coproduction deals, according to Howort.

Package deals. Another advantage to LBS, according to Mark Mascarenhas, vice president and general manager of LBS International, will be the ability of Granada to package LBS product along with its own programming. That's particularly good news for such LBS offerings as *Bonanza: The Next Generation*, *Vietnam War Story*, *Hit Squad*, *Care Bears Family* and others.

LBS will also do some selling for Granada in the U.S., although the product has not yet been identified and it's a nonexclusive deal.

Mascarenhas has been working hard to move LBS into the international barter business (the company is one of the biggest barter sup-



Mark Mascarenhas of LBS hopes to make barter deals in Europe.

pliers in the U.S.), but Europe has been slow to catch the barter tide.

While there are many different maturations of barter in Europe, as cash prices, particularly for U.S. product, begin to rise as competition and commercial telecasting grow in Europe, most distributors think barter will become a more attractive alternative.

Mascarenhas thinks the barter business will explode just as soon as ratings guarantees are offered. "I think that's what will change the whole ballgame," says Mascarenhas. "And somebody is going to jump out of the box with it very soon."

A bird in the air, not in the hand

TDF-1 officials hope they soon will reach some agreement on the rental of their three available transponders. So far only the French cultural channel La Sept has agreed to use the French direct broadcast satellite which was successfully launched in October.

Talks have been going on with the French pay-TV outlet Canal Plus and the German Bundespost, which is trying to find a home for several satellite channels after the unsuccessful deployment of its own satellite, TV Sat.

Money seems to be the major stumbling block in both sets of negotiations. The cost of a transponder on TDF-1 is believed to be considerably higher than renting a transponder on any of the other European satellites. Whether either of the possible clients ever takes one or more transponders remains questionable at the moment. But the Germans are hopeful that the French will adopt a more flexible approach now that TDF-1 is operative.

DATES TO REMEMBER!

The Television/Radio Age **"ROAD TO NATPE"**® series is in its 10th consecutive year.

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This series takes the reader through **INTV** into **NATPE** and **BEYOND**.

Companion pieces will further explore subjects such as barter alliances, the shifting of advertising dollars from network to syndication, the growing importance of international program acceptance in the launching of new product and the development of production consortiums.

Television/Radio Age's exclusive program syndication coverage will continue through the **post-NATPE** period and throughout the year.

The "Road to NATPE" is a copyrighted feature of *Television/Radio Age*.

november 1988

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Nov. 14—ROAD TO NATPE
Part I—(Daytime) Closes Oct. 31

Nov. 28—ROAD TO NATPE
Part II—(Late Night) Closes Nov. 14

december 1988

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Dec. 12—PRE-INTV ISSUE
ROAD TO NATPE
Part III—(Early Fringe) Closes Nov. 28

Dec. 26—INTV ISSUE
(distributed Jan. 3-8 in Los Angeles)
ROAD TO NATPE
Part IV—(Primetime) Closes Dec. 12

january 1989

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29	30	31				

Jan. 9—PRE-NATPE ISSUE
ROAD TO NATPE
Part V—(Prime Access) Closes Dec. 26

Jan. 23—NATPE ISSUE
(distributed in Houston Jan. 23-27)
A COMPLETE OVERVIEW OF ALL
PRODUCT BEING INTRODUCED AT
NATPE including a directory of all
programmers, product and personnel
Closes Jan 9th

february 1989

S	M	T	W	T	F	S
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12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28				

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Radio Report

Orson Welles radio exhibit revives the 'failed genius,' but daughter gets last word

They're calling it "a hearing," or maybe "a hear-in." It's the Museum of Broadcasting's first major radio exhibition, and it opened in New York right around the 50th anniversary of the time Martians landed near Grovers Mill, N.J., and touched off a national fright. The event, of course, was the Halloween eve, 1938, broadcast of *The War of the Worlds* by Orson Welles, an event that may also have marked the point in history when radio suddenly, if somewhat nefariously, came to be recognized as a mass medium of importance and influence.

That anniversary is the peg for the museum's radio exhibition which opened Oct. 27 and runs through Dec. 3. The exhibition's focus is on Welles' radio work, with a selection of 50 programs from the *Mercury Theatre on the Air* and the *Campbell Playhouse* series that ran on CBS.

Throughout a good chunk of the '30s, Welles established himself as a major radio personality, something which helped make him an international celebrity before making his first film. He used the radio income to help finance his theater projects. Welles joined *The March of Time* series in 1935, moved over to *Mercury Theatre* in 1938 and remained there after it evolved into the *Campbell Playhouse*.

To give the radio exhibit the feel of the times, the museum brought in Santo Loquasto, production designer for Woody Allen's film *Radio Days*, to furnish a



Orson Welles, from the golden age of radio.

small room in the museum's cramped quarters using some of the sets from the film. The result is a combination intimate living room and studio in which to listen and enjoy some of Welles' outstanding achievements in radio programming.

Those who knew him. To get things rolling, the museum opened the exhibit Oct. 27 with a seminar featuring actresses Geraldine Fitzgerald and Arlene Francis, writer Howard Koch and writer-actor-director Richard Wilson—people who knew and worked with Welles both on radio and stage. The panel was moderated by author/film critic Andrew Sarris, who was well qualified to discuss Welles' work, though Sarris fell into that abyss that afflicts moderator-critics by offering more opinions than questions.



Museum of Broadcasting's Radio Years exhibit opened Oct. 27. Those attending included, l. to r., Chris Welles Feder, Welles' eldest daughter; Howard Koch, Geraldine Fitzgerald, Arlene Francis, Richard Wilson and Andrew Sarris.

Unfortunately, John Houseman, who was Welles' partner in these "golden age of radio" days, sent word that he was too ill to make the trip to New York from California to participate in the exhibit's Oct. 27 opening, and died a few days later on the anniversary of the Martian invasion broadcast. But Houseman's recollections are included in a classy book which the museum is distributing as part of the exhibit. The book also includes an article by Howard Koch, who wrote many of the *Mercury* plays, including the later "Panic Broadcast." Of the Welles-Houseman relationship, Koch said that after Welles and Houseman parted ways, "that seemed to mark a turning point in Orson's career. I hope I do neither of them an injustice when I say that I feel Houseman was the base on which Orson's statue was erected. From the time they separated, Orson lived more the life of a celebrity than that of an artist."

In context. So much has been written about the *War of the Worlds* broadcast, and Houseman put the resulting panic into some context by recalling that war clouds were hanging over Europe, and with Munich just over, "there was a general air of fear and panic and a feeling of doom, a sense that war, international war, was inevitable. So people were pretty well primed for this latest catastrophe." After the broadcast Welles and Houseman were summoned over to CBS by chairman Bill Paley and president Frank Stanton. But they didn't quite know how to react, recalls Houseman. "None of them were absolutely certain whether we were scoundrels and villains and should be fired or heroes who should be promoted." In the end, he said, it was Campbell's that decided "if we could sell the Martians we could sell chicken soup."

Koch told the seminar that the decision to broadcast the *War* story in the first person singular and to use the breathless introduction: "We interrupt this program..." was conveyed to him by Houseman, who told him: "because that's the way Welles wants it written."

Wilson brought up a few touchy subjects, such as proper credits for some of Welles' work and Welles' fallout with Houseman, but there was no attempt to pick up on these thoughts and run with them or challenge Wilson. Too bad.

'Failed genius?' Of course, no discussion of the brilliant work of Welles would be complete without getting into his film career, and here the panel and the audience got bogged down in a wide ranging discussion of his rise and fall as a brilliant filmmaker. "He was a poor custodian of his talent," said Francis. "He just let it go." She then "let it go" and exited the seminar early. Later, when this "failed genius" part of the discussion surfaced again, there came an understandable reaction from Welles' eldest daughter Chris Welles Feder, a writer living in New York, who just happened to be attending the seminar.

"His career did not abruptly end with *Citizen Kane*," she said, and she accused the panel, particularly Sarris, of ignoring her father's middle and late period of development, particularly his European-made films, many still unfamiliar to American audiences. Unfortu-

nately, Sarris took it upon himself to argue rather than draw the daughter of the great producer into the discussion. But Welles-Feder persisted, and the packed theater cheered as she made her point. Welles would have been proud.—**Jack Loftus**

Sears down and GM up in July radio spending

Sears Roebuck and General Motors were the top spenders on network radio in July, according to BAR, but they were travelling in two different directions. Sears was down from \$6.6 million in July '87, while the auto maker was up from \$1.6 million. However, Sears is still up 15.5% for the year to date, while GM rose a hefty 95.3% for the seven-month period.

Another GM—General Mills—increased its July investment in network radio substantially over a year ago, rising from \$272,100 to \$1,880,675. Also up substantially in July was K Mart, which rose from \$1,045,120 to \$1,947,050.

But the biggest increase in July came from Volkswagenwerk, which was not listed by BAR for any expenditures on network radio last year. The German auto maker ranked eighth in July billings, but ranked second for the year to date.

Happy anniversary!



ABC News anchor Peter Jennings, l. and Forbes magazine chairman Malcolm Forbes, r., are two more big names, here helping Tom Snyder celebrate the first anniversary of his late night "Tom Snyder's Radio Show" on the ABC Radio Network. ABC researchers figure Snyder's ratings success is due at least in part to a big-name guest lineup that shows Robin Leach holds no monopoly on the rich and famous. Among those who've joined Snyder on his show have been Bill Cosby, Michael Dukakis, Julio Iglesias, Charlton Heston, Willie Mays, Tom Brokaw, Kirk Douglas, Morton Downey, Jr., Jackie Collins and Stevie Wonder.

Radio Business Barometer

Spot climbs 13.4% during September

September was the second big month in a row for spot radio, the second, that is, with double-digit increases.

The two good months follow a July that fell in the minus column—after adjustment—and a first half that was, essentially, blah. So, overall, it was a pretty welcome third quarter.

All four market groups participated in the September double-digitting, with the exception of the top 10, which was a sliver away from it.

The September increase came to 13.4%, which follows an 18.1% increase for August (adjusted) and a July that was down 2.6%. September time sales totaled \$87,517,300, according to the tally kept by Radio Expenditure Reports, which assembles data from the major reps. September of last year showed time sales of \$77,146,700.

September was the first month in the third quarter that did not require adjustment because of dif-

ferring lengths in the Standard Broadcast Months (SBMs). SBMs for September this year and last were both four weeks long.

As for the market groups, the top 10 were up 9.3% in September to \$33,186,600, the 11-to-25 group climbed 14.2% to \$19,463,300, the 26-to-50 group rose 14.1% to \$13,265,300, while the 51-plus group did best of all, increasing 19.3% to \$21,602,100.

Third quarter

In the 13 weeks of the third quarter, spot radio was up 9.0%, the best quarter of the year to date. It compares with the 4.8% rise in the first quarter and the 3.2% lift in the second quarter. Time sales for the third quarter amounted to \$270,859,700 as against \$248,608,800 during last year's July-September period.

Performance of the market groups in the third quarter was as follows, with the smaller the markets the bigger the increase in average percentage terms: the top 10 increased 5.7% to \$100,925,400, the

11-to-25 group rose 7.8% to \$59,849,300, the 26-to-50 group climbed 8.7% to \$41,675,400, while the 51-plus group, with the only double-digit increase, was up 15.4% to \$68,409,700.

Nine month total

Spot radio for the nine months to date was up 5.7% to \$716,284,000, compared with \$677,621,700 last year. That's about the same percentage level as spot TV, though the radio side doesn't seem to be complaining as much as the TV people (see spot TV story in this issue and *Radio Report* in the October 17 issue).

By market groups, spot radio for the year-to-date shows the following increases: top 10, 5.5% up to \$269,664,500; 11-to-25 group, a rise of 3.4%, reaching \$157,274,100; 26-to-50 group, up 6.6% to \$111,084,800, and 51-plus markets, a rise of 7.5% to \$178,260,700.

The reps report that the fourth quarter looks promising, with some key industry categories increasing their use of spot so far this year. Among the categories mentioned are automotives and retail stores (see *Radio Report*, Oct. 17).

August

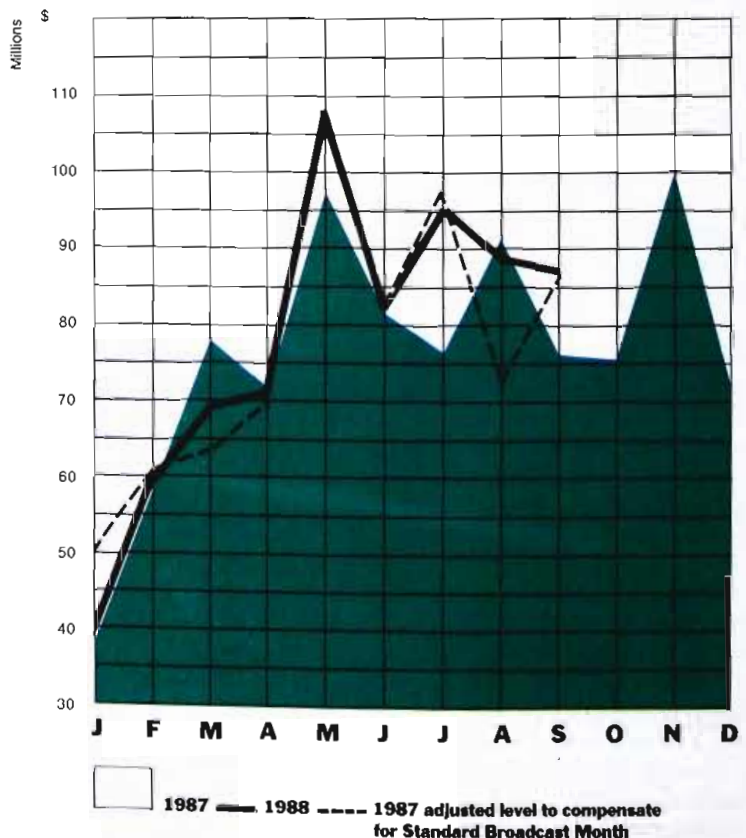
National spot +13.4%

(millions) **1987: \$77.1** **1988: \$87.5**
1987 adjusted \$77.1

Changes by market group


Market group	Billings (mils.)	% chg. 88-87
1-10	\$33.2	+9.3%
11-25	19.5	+14.2
26-50	13.3	+14.1
51+	21.6	+19.3


Source: Radio Expenditure Reports




Quick

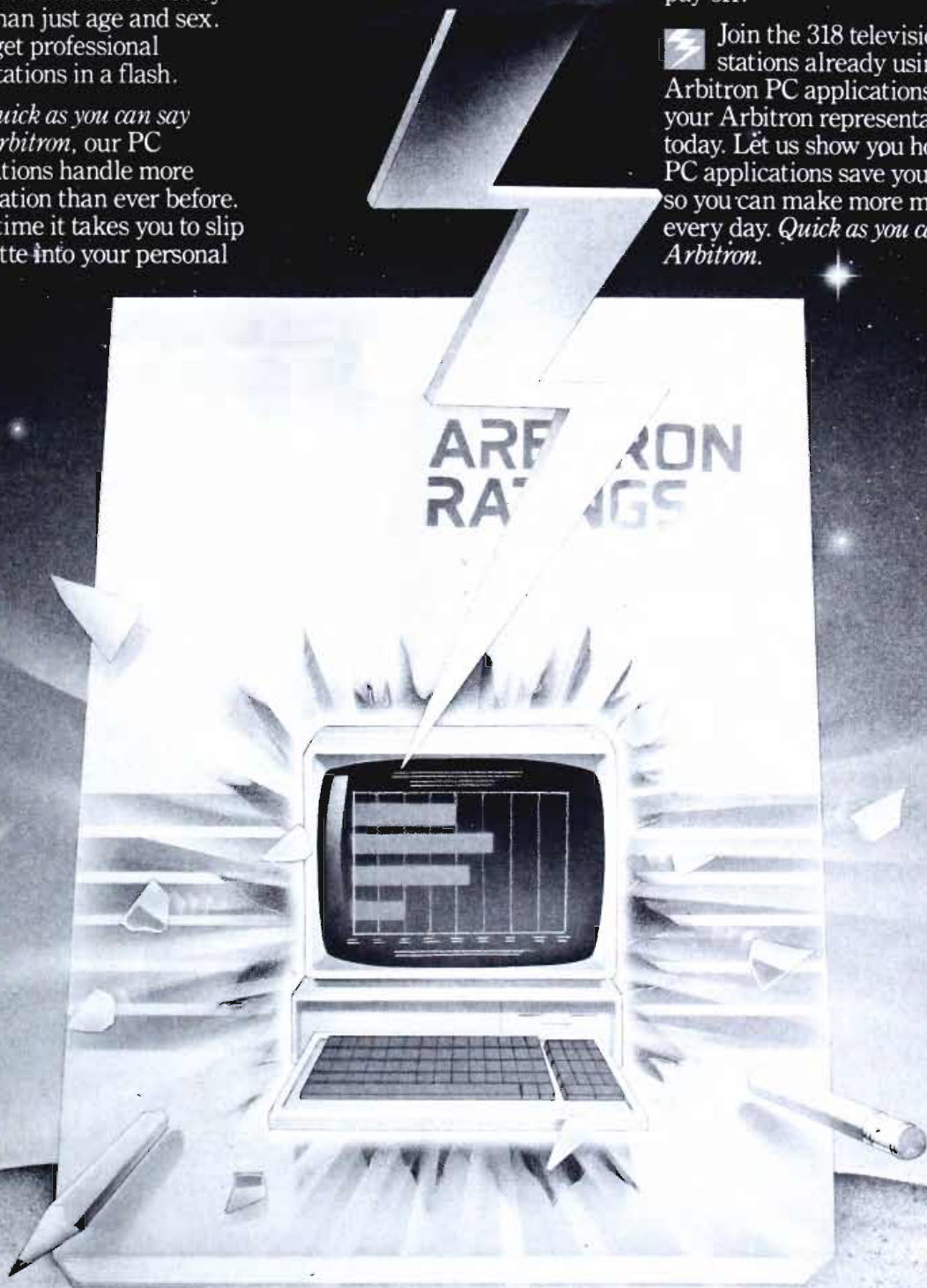
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ROAD TO NATPE

Too many children's viewing options and not enough advertising dollars

Kidvid shakeout seen triggering daytime shifts

By ROBERT SOBEL

As the 1989 NATPE convention approaches, the air is fraught with uncertainty for stations carrying children's shows, the major programming emphasis of indies in the daytime.

This season will be crucial, according to a consensus, because most of the indies with kids' programming are experiencing a similar downward trend in kids' business, which is seen as setting the tone of the future. Indications are that stations have already begun the hard process of trying to determine the proper programming path

to follow next season in light of the bleak business outlook in kidvid, already experienced by many this season.

An overhaul in kids' programming appears to be a certainty on the part of the indies for the daytime schedule, with two possibilities: a trimming of the kids' time period, most likely in the afternoon, for those that have been carrying a maximum of four hours; and, on the darkest side, stations pulling out of kids' entirely. This latter hypothesis is held most likely for the third or fourth kid-ranked indie in the market.

Part of an INTV survey released

"Chip and Dale's Rescue Rangers"



Television/Radio Age

November 14, 1988

Whether or not there are fewer syndicated kids' shows, the offerings will still be heavily soft animation.

this year indicates that 32 stations plan to reduce the amount of kids' programming in the future, while 51 independents are staying firm. And on a seasonal basis, only 23 said they plan to cut back on kids' programming, while 57 stations plan to keep the status-quo. (See table for details.)

The reasons for some of the difficulties being encountered by kid-carrying stations have been noted before: erosion in kids' viewing caused by cable and VCRs overloading of children's product by stations, sameness of product, and hard times experienced by toy manufacturers.

But whether the syndication production pipeline in kids' has slowed in keeping with the marketplace is hard to assess at this time. The majority of sources talked to believe the number of new kids' shows announced so far does not stack up with those spoken for last year at this time.

At first blush, with the NATPE convention still about two months away, only a dozen shows are in the running, as against about 20. From the present total, only about a half-dozen represent original strips; others are either weekly or contain new episodes of already triggered shows, or in a few cases, represent off-network series.

"Huckleberry Hound"



"Police Academy: The Series"

In any case, the program offerings for kids' will again be decidedly soft animation. There's only one live-action kids' game strip announced at this juncture—MCA TV's *Pictionary*, which will get a 13-week test beginning in June for possible fall launch if it does well. *Pictionary*, based on the popular board game, has already cleared

several major markets and station groups. These include United Chris Craft stations in Los Angeles and San Francisco, all five Gaylord stations plus MCA's WWOR-TV New York.

Also, there's a combination of live-action and animation hour, *Super Mario Bros. Power Hour*, from Viacom. Worldvision Enterprises has a weekly game show, *Skedaddle*, which has already begun airing as part of its two-hour Sunday morning block, *Funtastic World of Hanna-Barbera*. And if *Skedaddle* gets enough kid interest, it's likely it will be offered as a strip for next fall. (Listing of kids' product for next fall, next page).

With children suffering from malnutrition in terms of advertising and from overindulgence in the form of a glut of choices and product, the days of judgment and decision are fast approaching for stations on whether to continue to be or not to be a kids' outlet.

At WKBD-TV, a leading indie, Paul Prange, program manager of the Detroit station, notes the kids' marketplace is not what it had been in the past. But whether kids' programming is an extinct or obsolete concept is still up in the air, he says.

"I know a lot of stations that have gotten out of the kids' business. But we are not at that point.

First run, half hour children's shows (animated) 1989

Program	Distributor	Episodes	Runs	Terms
Bugsburg	Group W	65	8	B(2+/3+)
Chip and Dale	Buena Vista	65	4	B(3/3)
Denver the Last Dinosaur*	World Events	65	8	B(2+/3+)
Duck Tales	Buena Vista	30	3	B(2+/3+)
Huckleberry Hound	Worldvision	N/A	N/A	N/A
Muppet Babies	Claster	65	8	B(2+/3+)
New Archie's	Claster	13	4	B(2/4)
Police Academy	Lexington	65	8	B(2+/4)
Punky Brewster	Saban	21	2+	B(2/4)
Super Mario Pwr. Hr.	Viacom	65	4	B(5/7)
Vytor, Starfire Champion**	World Events	13	4	B(2+/3+)
Live-action children's series for fall, 1989				
Pictionary***	MCA TV	N/A	N/A	B(2+/4)

Source: Petry Television. B = barter. Figures in parenthesis represent national barter time available, then local minutes. + equals 30-second unit. * Weekly series, becomes a strip in fall. ** Gets January 1989 test for one week on Tribune stations. *** Gets June test. All series available next fall except "Archie's," for January. "Super Power Hr." is one-hour show.

The jury is still out on which direction the kids' business will go. We are getting down to looking at how much of the downturn is product, business or program related."

Even a station such as KTRV-TV Boise, which has the kids' market all to itself, has cut its afternoon schedule for children. Diane Frisch, program manager, says the kids' market is drying up. "We are doing good kids' numbers, but who do we sell it to? You can do only so much in kids'. Our afternoon block was shortened from two hours to an hour-and-a-half and then crosses over to live action."

Inventory vs. revenue

At WTFX-TV Philadelphia, LaRhe Vestal, program manager, says that she is seeing less kids' dollars than the station has experienced previously. She notes, "I think there will be an evaluation on how much inventory a station has to carry in kids' for next season. We ourselves will have to take a look at how much inventory we have vs. how much we project as coming in in the way of ad dollars."

One consideration to be explored, Vestal continues, is to carry fewer kids' programs. "Today, on a Monday through Friday basis, we have six hours—three in the morning and three in the afternoon." Overall, she points out, off-network sitcoms or other programming may be placed in the kids' blocks. "Hav-

ing something different from animation may not make that much difference to the audience in some cases. But the money does to us."

Stu Swartz, general manager/station manager at KMSP-TV Minneapolis, top kids' indie in the market, notes the station's policy has been to cut back on its kids' schedule for the first three-quarters of the calendar year, both in good and bad times. And in January, the station will run *Little*

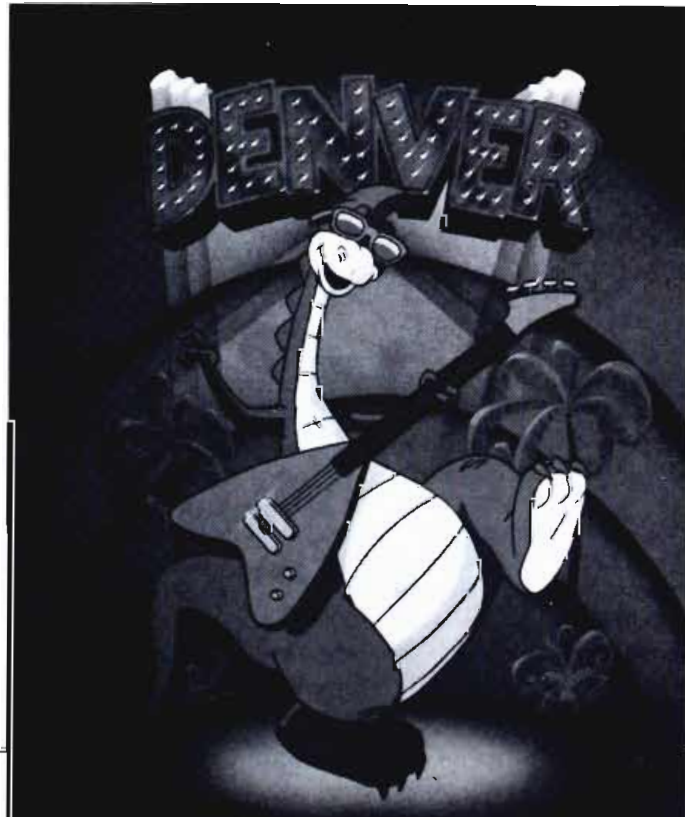
House on the Prairie from 4-5 p.m., which was occupied by children's shows during the October-December months.

While he agrees that stations are in the midst of a soft kids' marketplace, Swartz adds that broadcasters should "take a hard look in the mirror and realize there are a lot of advertisers out there for kids that we have ignored. We have to understand we should try to reach them, whether they are retailers or Jell-o manufacturers."

Don Inman, director of marketing at INTV, sees down the road a contraction or realignment of kids' programming in cases where there are three or more indies in a market. But, he says, where there are two or less indies, there is probably enough business in kids for the stations to stay in children's programming.

He envisions the changes in markets with three or more indies will begin to occur after the fourth quarter. At this point, according to Inman, a lot of stations are considering what their options are. Markets such as Minneapolis, Hartford-New Haven, San Diego and Houston, with a number of indies in each, are all undergoing some form of programming changes to conform with the changing viewing

"Denver the Last Dinosaur"



habits of children.

The first indication of this is the move away from traditional animation toward looking to attract older-skewing viewers with programs such as *Finders Keepers*, *Fun House* and *Double Dare*. But Inman sees an even wider break from children's-oriented shows on the part of multiple-indie markets, which will move them into more adult fare in daytime.

Ranking's a factor

In a four-indie market such as Hartford-New Haven, the evidence is also clear that the third and fourth ranked stations are simply trying to play catch-up ball or looking to stay viable, while even the No. 1 kids' station is having its problems as well. At WTIC-TV, Melanie Gerig, program director of the top kids' station in the market, says that kids' business is "very bad this year. Usually this time of year, you can't find space available in kids' time. Now we have places in our schedule that are open.

"The national sales just aren't there, and, of course, most of the sales are national for kids. And if we aren't getting the buys, I can imagine what the other two stations in the market are doing."

Despite the lackluster kids' business, WTIC-TV is not planning to cut back on its kids' programming—at least for this season—notes Gerig. "We are not cutting out 6:30-9 a.m., 2:30-5 p.m. children's block this season, although I understand that several stations are doing that."

Gerig explains the station is holding firm on its schedule because it has committed itself to several presales.

"We have cleared a lot of product a few years in advance, so that we have more than enough shows for the five hours. But in the future, I expect to cut the hours to four, at the least, and will probably run kids' from 7-9 a.m. and from 3-5 p.m."

While WTIC is keeping its kids' show block intact, it made some programming changes last September from the previous season's fare. According to Gerig, *The Flintstones* and *The Snorks* are new, while *Yogi Bear & Friends* was

INTV independent station programming survey

Question	Response parameters	Combined results	By market rank				
			7-10	11-25	25-50	51-100	100+

In view of reduced revenue and children's viewing over the last year, are you planning to reduce the amount of children's programming in the future?

Yes	32	3	11	6	6	6
No	51	14	16	7	9	5

As an alternative, do you plan to cut back on children's programming on a seasonal basis?

Yes	23	1	11	3	6	2
No	57	16	14	10	9	8

What percent of total station revenue is generated by children's programming?

0-10%	30	10	9	1	5	5
11-20%	23	4	9	6	2	2
21-30%	10	0	3	3	3	1
31-40%	4	0	2	0	1	1
41-50%	0	0	0	0	0	0
51-60%	1	0	0	1	0	0

If you eventually reduce the number of children's programming hours would you consider the importance of the following reasons?

Too many competitors	Yes	17	2	7	5	1	2
	No	63	12	19	9	14	9
Unpredictability of programming	Yes	30	4	14	3	7	2
	No	50	10	12	11	8	9
Low HUT levels	Yes	40	3	18	9	6	4
	No	40	11	8	5	9	7
Decreasing revenue	Yes	66	10	17	14	14	11
	No	14	4	9	0	1	0

How many stations in your market have a children's block of programs on a regular weekday basis?

1	1	0	0	2	4	5
2	20	4	8	5	3	0
3	20	7	9	3	1	0
4	5	0	5	0	0	0
5	2	2	0	0	0	0
6	0	0	0	0	0	0

Do you feel there is a change going on with children in terms of the following?

Soft vs. action program content	Yes	71	15	22	13	11	10
	No	12	1	5	1	4	1
Half-hour vs. shorter cartoon format	Yes	27	8	8	3	3	5
	No	53	6	19	11	11	6

Do you feel you will still be in the kids' business in the 1990's?

Yes	79	14	26	13	15	11
No	3	1	0	1	1	0

Question	Response parameters	Combined results	By market rank				
			1-10	11-25	25-50	51-100	100+

What percentage of your children's programming is barter?

0-10%	0	0	0	0	0	0
11-20%	3	2	0	1	0	0
21-30%	2	0	1	0	0	1
31-40%	3	2	0	0	1	0
41-50%	5	2	0	2	0	1
51-60%	2	0	0	0	1	1
61-70%	4	1	3	0	0	0
71-80%	13	4	4	3	2	0
81-90%	19	3	8	1	3	4
91-100%	32	2	10	7	9	4

Do you believe distributors should do more testing with children's audiences before going into production?

Yes	80	15	27	13	15	10
No	4	1	0	1	1	1

Do you believe new live action programming (like "Pee-wee Herman") can outperform animation?

Yes	37	10	11	6	5	5
No	45	7	16	7	10	5

shifted from the afternoon to the morning as of October. In explaining the *Yogi Bear* move, Gerig says that overnight numbers from other markets indicated that the program did better in the morning than in the afternoon.

Yogi Bear traded slots with *Alvin & The Chipmunks* and is working well in its 7:30 a.m. slot. The same holds true with *Alvin*, which now occupies the 4 p.m. time period. Other programs in the lineup are *Snorks* at 2:30, followed by *The Jetsons*, *Beverly Hills Teens*, and *Duck Tales*. Hills, says Gerig, is "doing surprising well," considering it's mainly geared for girls.

The No. 4 kids' station in the Hartford-New Haven market, WTIC-TV, has already trimmed its children's schedule in the afternoon from two hours to one, while retaining its 7-9 a.m. kids' block. According to Jim Kontoleon, vice president, general manager, the cut was made in May 1987. The station had been airing high-tech action shows such as *Macron I* and *Defenders of the Earth* from 3-5 p.m. The current hour lineup consists of *Rin Tin Tin* and *The Real Ghostbusters* from 3-4 p.m.

Big Valley follows the two series, and at 5 p.m., the station runs *Little House on the Prairie*. Kontoleon admits WTIC-TV has not had

very good success in selling the children's programming. "We haven't been picking up much revenue in that, so we cut the schedule. However, if someone asks me about kids' programming, I point out that *Little House* has more children watching it than the pure children's shows. It's a family show. So what is a children's program? It's a show that children will watch, although many adults watch it as well, so I don't feel I'm ignoring children."

But Inman, regarding his "adult" theory, is referring not

simply to replacing traditional children's shows with off-network sitcoms which have children's appeal—a practice among several stations looking to keep kids tuned. "That's really an extension of trying to hold the kids," he says. "What I'm talking about is reprogramming the daypart for a teen or an 18-24 audience."

One approach he sees in this regard is the scheduling of one-hour action blocks. Both in New York and in Los Angeles, on WWOR-TV and on KHJ-TV, respectively, children's programming has been replaced by action hours including *Matt Houston*, *Magnum P.I.* and *Hawaii Five-O* as alternatives to kids' fare in the daytime.

Down the road, says Inman, more stations will schedule similar alternatives in the daypart. "The trend initially will be in markets with three or more indies, but eventually it will filter down to the second indie in a two-indie marketplace that is not making the kind of money or the numbers it should be getting."

Gerig at WTIC, however, questions whether targeting programs to the older segment of kids' viewers is advisable. "Years ago, that might be the case. But *Duck Tales* at 4:30, which is the premium time period, is very young skewing. Next year, we will place the other animated Disney show, *Chip and Dale*, possibly at 4, so we will have an hour of Disney."

In fact, she continues, she doesn't abide strongly with the kid-

"The Muppet Babies"



Adult fare finding daytime berths

Chances are good that a more-than usual number of new first-run adult offerings for next year will find a home in the daytime on affiliates.

Much of this is because producers are looking to fill what they believe will be available spots in access, left vacant by failed or nonreturning shows. If this theory holds firm, the rush will be for access, leaving the leftovers with a good opportunity to get into daytime.

Jack Fentress, director of programming at Petry Television, says that program distributors and producers are beginning to "sniff there might be some cracks in the dike in access and in early fringe this year, for the first time in two or three years."

Basically, only a half-dozen new strip entries are being marketed for a daytime slot primarily. These are *Kenny Rogers*, from Barris Entertainment; *Dionne and Friends*, from Tribune Entertainment; *The Joan Rivers Show*, also from Tribune; and *Arsenio Hall*, from Paramount, which is planned for a January start; and *Mother's Day*, featuring Joan Lunden, from Michael Krauss Syndication.

Also, a pilot is being shot by GTG Entertainment featuring Beverly Sills, which will probably look for a daytime slot. But, points out Fentress, court dramas and pure talk shows, which used to be part of the mix winding up in daytime, appear to be scant.

Early returns. Meanwhile, the performances of the fall first-run daytime newcomers is anything but bright, with one or two exceptions, so far as early returns are concerned. *Live With Regis and Kathie Lee* is performing well in New York, Cleveland and Denver, according to Petry's overnight report for seven weeks ending Oct. 21, but is failing to generate a 10 share in seven markets. In Denver, it won the time period.

Fentress says that *Lee* is probably disappointing to Buena Vista, its syndicator. But, he adds, on the other hand, stations believe it is a good program and expect to give it time to grow. "You don't hear that about the other shows."

Family Medical Center has some positive stories in Atlanta and Miami. In Atlanta, it racked up an average 6/25 at 11:30 a.m. "In general, the performance remains weak," notes Petry. *Body By Jake*, on two of the metered stations, KOFY-TV San Francisco, at 6:30 a.m., and on KDAF-TV Dallas, at 9 a.m., delivers a 0.6 rating in each.

A game show, *Wipeout*, has been averaging a 3/14 in the morning on both WXIA-TV Atlanta and on WSVN-TV Miami, winding up third in the time period.

to-kiddult flow normally followed by stations in scheduling in the afternoon. Cable penetration in the market is 77%, one of the highest in the country, she points out. And children have a wide variety of choices. For that reason, and "because of the zapper, the kids can change the channel whenever they want. There is so much available to them that it doesn't matter about the demo flow. They put on whatever they want without getting off the chair, just like the adults."

Meanwhile, the future of live-action kids' game shows is uncertain. The consensus is that they are holding their own or are disappointing generally, compared to some of the new animation, most notably *Duck Tales*. John von Soosten, Katz Television Group

vice president and director of programming, says it's too early to predict whether animation in general is winning the war, but that "there are particular battles being won by *Duck Tales* and *Alvin and the Chipmunks* because they are stronger shows than some of the other animation.

"In the future, when *Chip and Dale* and animated product based on classic themes, or on a strong Saturday morning network track, come down, they will do fine. Shows that have either a weak concept or a weak network track won't do well.

Von Soosten adds that the live-action reality kids' shows will find a niche. "They may not have as good kid appeal as animation, but they will have some value to indepen-

dents that use them in positions where they have strength."

At WKBD, which has *Double Dare* and *Fun House* on its present schedule, Prange says *Fun House* is doing well but that *Double Dare* has shown some erosion. However, he says, the producers of *Double Dare* "are aware of the problem nationally and are freshening the approach of the show with talent searches and other things. So both shows are hanging in there. And I think the jury is still out on whether live action kids' programs will be the trend of the future or just a fad for the current season and next season."

Dilution by clones

Jack Fentress, director of programming at Petry Television, says that there's nothing really wrong with a concept such as *Double Dare*. What's taken some of its strength away are clones. "It's just that now there are three shows all going for the same audience."

KTRV runs *Double Dare* at 4 p.m., having delayed it until last fall because its previous occupant, *Leave it to Beaver*, was doing well. *Beaver* has since been moved to 4:30 p.m., says Frisch, where it continues to perform high. "I think we'll see a good number on *Double Dare*, but I don't expect it to be a blockbuster. It will probably level off elsewhere. It will do all right here because there is no other kids' station in the market." □

"Mother's Day"



Vintage shows: All legs, no cash

Stations say 'comfort factor' draws audiences

By ELIOT TIEGEL

Vintage programs continue to play on independent and affiliate stations, but healthy competition from the bubbling cauldron of off-network titles is cutting into the market for evergreen suppliers.

Depending on which distributor one speaks to, the market for programs of the '50s and '60s genre is healthy or has been affected by the industry's financial problems, buyout fever and enthusiasm for all the new goodies the barter companies are offering.

"Our product is selling better this season because of the great influx of independent stations in the last three years," says Joseph D. Zaleski, president of domestic syndication at Viacom, which offers 65 off-net series. "They all need programs."

Counter that with comments from Burt Rosenburgh, executive vice president, general manager of Worldvision's evergreen division: "We've experienced a tough cash market in the past year. We're beginning to see a bit of a change. There have been major cutbacks in cash expenditures for programs, a lot of leveraged buyouts and selling of stations, a drop in spot advertising dollars and an increase in the availability of barter programs."

Perpetual winners

Worldvision, the first company to launch an expressly designed department for classic programs in 1981, has seen, according to Rosenburgh, "a 30%-35% dropoff in business."

But, he continues, "We're still here, and like the stock market, we swing with the pendulum."

On the station side, executives laud classic programs for their perpetual ability to draw viewers of all ages, children and parents enjoying programs with familiar names and familiar storylines. Even though most of these programs are in

black-and-white, this does not seem to affect viewership. Granted, they don't perform like a hot, new property; they deliver acceptable ratings in the 2 to 5 range.

Notes Jeff Evans, general manager at WFFT-TV Fort Wayne, Ind.: "These shows are what people grew up with. *Andy Griffith*, *Leave It to Beaver* and *The Brady Bunch* are better than a hell of a lot of the crap on the network or coming off today."

Worldvision, with its thousands of hours of evergreen programming, is compared by Rosenburgh to a football lineman: "Every station needs a locomotive on its team. But it also needs linemen, and we've got the linemen."

Classic programs are "a more cost-efficient kind of programming," Rosenburgh continues, "than buying off-network. If off-net doesn't do double digit figures, you're in trouble. If, with an evergreen you do a 2 or a 3 and not a 10, you're going to have a far more financially successful picture."

Syndicators acknowledge that within a very complex rate card, vintage shows can be acquired for as low as \$50 an episode for small markets to just a few hundred dol-

lars for major ADI markets.

"When I buy a show for less and charge the same rates for this program, it's a profitable situation for me," says WFFT's Evans.

Among Worldvision's bevy of classic beauties are: *Ben Casey*, *The Fugitive*, *Combat*, *Mod Squad*, *Streets of San Francisco*, *Dark Shadows*, *That Girl*, *Man From Atlantis*, Gene Autry western films, as well as numerous cartoon series from Hanna-Barbera.

"Our objective is to get the clearance and a liveable rate," says Rosenburgh. "We're looking to move a quantity of hours. We're looking for a piece of the pie, rather than a price for a new show."

WQTV(TV) Boston, which has been airing *Streets of San Francisco* in the afternoon and WVEU(TV) Atlanta, which has been running *Combat*, are two outlets finding favor with viewers for vintage programming.

"The program director at WVEU told me the station received 300 letters from people thanking them for putting *Combat* back on the air," says Rosenburgh.

Why do *The Honeymooners*, *I Love Lucy*, *Dick Van Dyke*, *Mary Tyler Moore*, *Gunsmoke*, *My Fa-*

Viacom's "I Love Lucy"





Worldvision's "Ben Casey"

avorite *Martian*, *The Twilight Zone*, *Bewitched* and *I Dream of Jeannie*, for example, remain on station schedules? "Because they don't age and have legs," asserts Rosenburgh.

"Because they have viability and viewer urgency," believes Viacom's Zaleski, who admits he "hates the term evergreen. It indicates something that's old. A show is not old if it delivers viewers. *Lucy* is 35 years mature. It's delivering 5s in the afternoon in Los Angeles. *Andy Griffith* beats *Wheel of Fortune* on WSOC-TV in Charlotte, N.C. *The Honeymooners* in New York had 145 telecasts in its history and it still delivers a big audience."

Among Viacom's classics are *All in the Family*, *Hogan's Heroes*, *My Three Sons*, *Gunsmoke*, *Rawhide*, *Bob Newhart*, *Mary Tyler Moore* and *Perry Mason*.

New audiences

"One thing is very important," stresses Zaleski: "The shows with tremendous appeal were never cancelled. The stars or producers decided they'd had enough. In some markets the price we're getting for a *Honeymooners* equates to 40% of a *Cheers* price."

Recycled product moves from a market's premium station to the No. 1 indie, then to the number-two indie and so-on down the line. A good program, Zaleski believes, "will have continuing stability in

basic cable." In fact, there are classic shows all over cable, courtesy of stations included in the local must-carry or distant signal lineup. And on some of the services. *Nick at Nite*, for example, has among its weekly offerings *Mr. Ed*, *My Three Sons*, *Donna Reed* and *Car 54*.

"The audience for this kind of program doesn't seem to go away," asserts Dirk Brinkerhoff, vice president/general manager at KTXA-TV Dallas. "Every year a new group of viewers is at home during the day and sees these shows for the first time. They continue to perform, but not at the level of a Bill Cosby or *Cheers*. But they work for the amount of money you pay for them."

The dollars coming to Twentieth Century Fox for its evergreen shows is up a bit over previous seasons. "We're selling a little better than in the past couple of years," notes Joe Greene, Fox TV's vice president. "The number of new hours offered in domestic syndication has dropped considerably because of a number of shows including *Miami Vice* and *Murder, She Wrote*, have gone to cable."

Greene sees interest among affiliates for vintage shows, "buying them for Saturday and Sunday and to strip early in the morning." WTNH-TV in Hartford, Conn., for example, ran *Lost in Space* Monday through Friday from 6-7 a.m.

Fox's evergreen offerings include: *Batman*, *Dobie Gillis*, *Lost*

In Space, *Nanny and the Professor*, *Room 222*, *12 O'Clock High* and *Voyage to the Bottom of the Sea*.

"We have some shows we don't market any more; they didn't produce enough episodes, some didn't perform as well as we'd hoped, and in some, the style of acting was dated and the subject matter wasn't contemporary." A strong evergreen, Greene believes "has lasted through the test of time and is just as viewable today as when it was produced."

At Lorimar Syndication, there is concern for the amount of off-network and first-run programming which is available to indies. Keith Samples, senior vice president and general manager for perennial sales there, says stations are shifting off-net shows that don't work in access and fringe periods into less desirable periods—often the slots for older shows.

He feels stations downplay promotion of vintage shows in favor of newer titles in access periods.

Lorimar's golden oldies include: *My Favorite Martian*, *Here's Lucy* (with her two children), *Mayberry RFD* and *Dick Van Dyke*. From Samples' perspective, "any show that's beyond its first cycle" qualifies as an evergreen, so he lumps in *Eight Is Enough*, which has been in syndication more than six years.

Viewer acceptance

From the stations' viewpoint, evergreens "have a built-in viewer acceptance. There is a tremendous comfort factor with the acts and their audience," asserts Gail L. Brekke, general manager at Minneapolis' KITN-TV. "Both adults and a constantly new audience are being introduced to them. A lot of people grew up with these shows in primetime on the networks. These were the most successful shows of their day. They reached higher network ratings than most primetime network shows do now."

KITN airs its evergreens in the afternoons, early fringe, latenight and on weekends. Notes Brekke: "These are key dayparts, not throwaway periods." Among the station's veterans are *I Love Lucy*, *Dick Van Dyke Show*, *Gilligan's Island*, *The Brady Bunch*, *Mary*

Tyler Moore Show, *Bob Newhart Show*, *Star Trek* and *Beverly Hillsbillies*.

"When you see big specials like *Return to Gilligan's Island*, *Return to Mayberry* and the *New Leave It to Beaver* series, it just tells you there's something about these shows," says Brekke. "They're classic Americana, and we like these characters."

Brekke, like most station officials, says her station does well with advertising for these shows. "They have a high name recognition that clients don't argue about. It's like Kleenex or Levis; you know what it is." Brekke does admit, however, it's not an easy sell. "Nothing is an easy sell when you're selling independent TV."

She says one sticky point is asking the syndicator for market exclusivity since some cable superstations carry these shows into her region. "Viacom is the most difficult company to discuss granting syndication exclusivity with," she says.

Alternative to networks

At KZKC-TV Kansas City, Mo., evergreens are programmed "as an alternative to the networks themselves," says general manager Bob Harris. He's got *Gunsmoke* and *I Dream of Jeannie* and had *The Honeymooners* during the summer, for which he paid in the \$250-\$300 range per episode.

Having switched *Gunsmoke* from a 7-8 p.m. weeknight strip to Saturdays and Sundays from 9-10 p.m., Harris effusively says: "I never cease to be amazed at the loyalty of the *Gunsmoke* audience."

"I happen to be one of these people who believe I don't have to be No. 1 to be profitable," says Harris. "*Gunsmoke* tends to skew a little older, 25 to 54 and 55 plus, and there's a plethora of products that from a cost effective point of view are terribly attractive to shows with older audiences."

As a 24-hour "family station," WFFT-TV Fort Wayne, Ind., finds vintage programming "is easy to sell," boasts Jeff Evans, its vice president/general manager. "Clients ask about audience composition, and because we're family-oriented we get results."

WFFT has aired *Brady Bunch*,

Andy Griffith with *Twilight Zone* taking a hiatus until next January when it will again be slotted at 11 p.m. The other two have run in the 5 and 5:30 p.m. periods.

Evans says he's able to pay for the shows with the first minute to minute-and-a-half of advertising.

While Evans admits a show in color "is worth more than if it's in black-and-white," there are no audience complaints about an oldie running in b&w. "Some stations lay down a rule that if it's not in color they won't run it. I disagree."

The right time

Nighttime is the right time for oldies at KTXH(TV) Houston. "They do very well between 10 and midnight," says Julio Bermudez, the vice president/general manager. The station runs *Honeymooners*, *Mary Tyler Moore*, *Bob Newhart* and *Little House on the Prairie* in its classics period.

Bermudez buys evergreens as a means of filling timeblocks during the off season when the Rockets are not playing. They and movies fill the bill.

"With the price of new programming going up in the last couple of years, the classics are a lot more profitable to have." The executive says these evergreens pull a 4 rating.

In Los Angeles, KCOP(TV) runs *I Dream of Jeannie* and *Bewitched*, both in color. They run weekdays against network soaps. Carol Martz, KCOP's program director, notes both shows have averaged 2/8 Nielsens.

Martz says it's rare for the station to pull a specific advertiser for an evergreen show "since we sell daytime rotation from 9-2 p.m." These are proven shows, she stresses, adding: "It's very difficult for an independent to have an unproven show (as a success) in the daytime. There is so little money generated in daytime in this market, so everybody sells very similarly in daytime rotation. It doesn't make a lot of sense to put a lot of money into daytime. So it's profitable to stay with this kind of programming."

Martz says the station often switches shows from other time periods into the daylight hours when they're nearing the end of their

run.

KTXA-TV Dallas has 11 evergreens in its schedule. They all earn the station ad dollars. "We are sold out all the time," claims vice president/general manager Dirk Brinkerhoff. "Advertisers buy these shows because they get them at inexpensive prices. The rates are cost-effective and run in the \$100 per episode range."

The station's roster of evergreens includes *Batman*, *Superman*, *Gomer Pyle*, *Bob Newhart*, *Alfred Hitchcock Presents*, *Night Gallery*, *Andy Griffith*, *Munsters*, *Adams Family*, *Honeymooners* and *Outer Limits*.

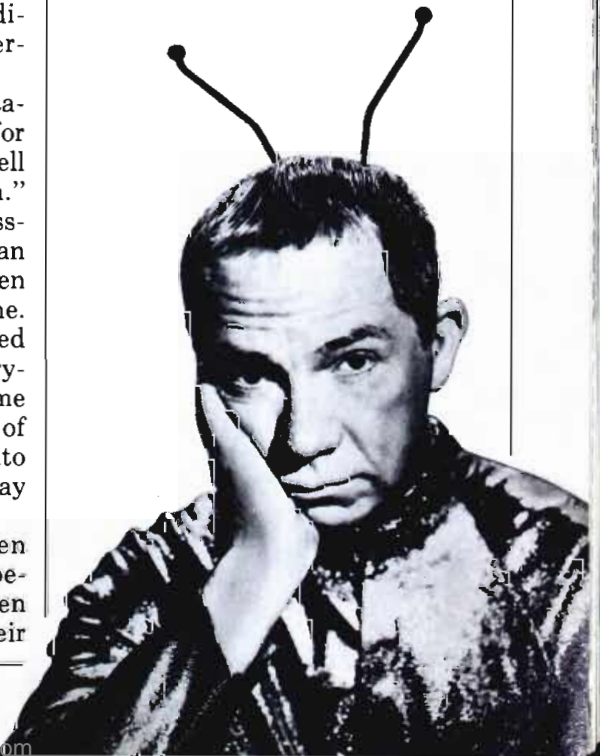
"We do an analysis of every show we buy," explains Brinkerhoff. "We buy for the time period where we have a need."

KTXA runs these shows mostly in daytime and in late fringe, competing against movies and sitcoms on the other indies and soaps on the nets. The programs do 2s and 3s in the ratings. "If they do a 1 we try to replace them."

Having taken an audience poll to ascertain feelings about black-and-white vs. "colorized" shows, Brinkerhoff says his viewers prefer old classics in b&w.

The lack of tint seems to lend a sense of history to these shows, guaranteeing them to be of a ripe old vintage or representative of a cherished friend who is always welcome in your home. □

Lorimar's "My Favorite Martian"



Underlying reasons are offered:
slow advertising, cable, barter, 15s

'88 spot television doldrums seen continuing in '89

By ALFRED J. JAFFE

The spot TV doldrums of 1988 will continue into next year, according to station reps, the people who live or die by spot TV billings.

As for the rest of this year, the consensus of the major reps is that the fourth quarter will be pretty sluggish, with some exceptions cited for October, with the final surge of political advertising.

By and large, the reps are pretty grim about spot TV's short-term future, seeing low single-digit increases continuing, but there were some who predict a turnaround in perhaps a year or two.

Perhaps the most passionate seer is Raymond Johns, who feels the broadcaster has been weak in defense of his interests, a contributing factor in spot TV's weak showing. The president of Seltel aims his arrows particularly at barter,

which he insists is diverting business away from spot, despite its being labeled "a network buy."

While there is a wide belief that no or low inflation is a good thing, the reps leave the impression that inflation appears to be a *sine qua non*, a necessary accompaniment, to spot growth.

Among the factors that reps point to in citing continued slow growth in spot is the overall boom in inventory and its depressing effect on rates. Inventory growth is due to the increasing number of 15s on the networks, the growing number of independents and the availability of cable and barter syndication networks. Said one source: "You can drive a truck through the average station's open inventory these days."

According to TV/RADIO AGE's sample of stations for its *TV Business Barometer*, spot started off the year on a promising note. Janu-

ary showed a double-digit increase (14.9%), and while growth rates fell off during the next two months, the first quarter ended with a rise of 10.0% over the preceding first quarter. During the second quarter, however, the bottom dropped out of spot and the *Barometer* sample showed an increase of only 1.5%, compared with the year before. Reps and stations viewed the second quarter as a disaster.

Spot growth improved only slightly in the summer quarter, with an increase of 5.9%, about the same level as the first half, according to the *Barometer* figures. (However, earnings fell during the quarter for the capacities/ABC and CBS owned stations.) For the nine months, the overall growth in spot shown by the *TV Business Barometer* came to only 5.3%.

High hopes dashed

This year was a special disappointment to the reps because of high expectations regarding the quadrennial cycle, the parlay of the summer and winter Olympics and the Presidential elections every four years.

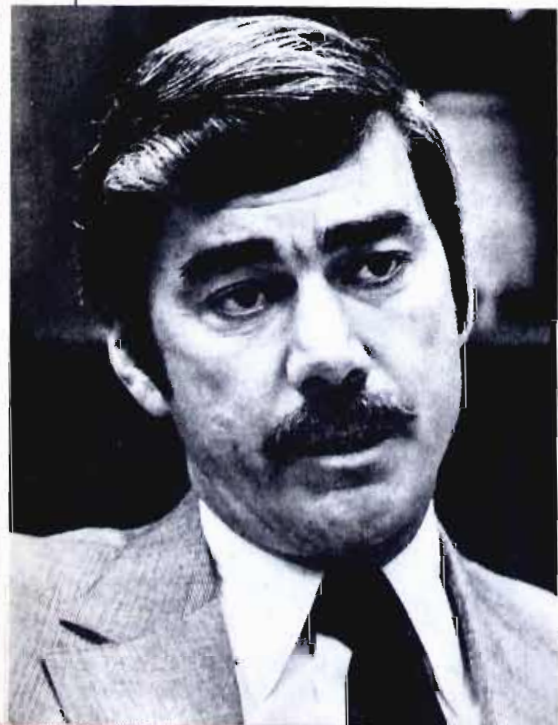
Certainly, from the '60s on, the quadrennial interruption displayed a hump in the year-to-year growth figures for spot TV. There was a double-digit hike in every quadrennial year from 1964 to 1984. The most dramatic example was in 1976, when spot rocketed upward 33.2% over the year before, according to FCC figures. The year-before and year-after increases were, respectively, 8.4% and 2.1%.

The most recent figures, gathered from the *Barometer* sample and covering 1984, show a 12.0% increase, with the '83 figure being 9.5% and the '85 figure being 7.7%.

While it is true that the increase shown so far this year is higher than that of '87, last year was a not-so-hot year. The increase for '87, according to the *TV Business Barometer*, was only 3.8%.

That explains why Pete Goulazian, president of Katz Television, prefaced his remarks about the state of the spot TV business, by saying, "Last year was the toughest year; '88 was the most disappointing."

John "Jay" Walters, HRP



*Predicts spot
will likely be
"flat" during
the October-
December period
following an
essentially flat
third quarter.*

Goulazian sees spot overall entering a plus-3% fourth quarter and notes that the '87 fourth quarter was not strong, "making it two consecutive weak fourth quarters."

The Blair Television newsletter, *4th Quarter Outlook*, headlined its first page, "What Happened to the Quadrennial Cycle?" and led off with: "A rise of only 3-4% is projected for fourth quarter spot spending and an increase of 3-5% is forecast for the year 1988. These modest increases suggest that the twin engines of the Olympics and political dollars, which drove quadrennial cycle years in the days of limited TV inventories, don't have enough steam to tighten up the market in the expanded TV universe of 1988."

The newsletter noted that Presidential political spending in September did not live up to expectations and "future spending by Bush and Dukakis is expected to occur only in selected regions of the country where the race is close."

Nonpresidential better

However, the newsletter went on, spot spending by congressional and state-level candidates is "healthier than presidential, although spending levels are still behind 1986 levels." The newsletter cites an estimate by Bob Coen, senior vice president, director of forecasting at McCann-Erickson, that nonpresidential races account for about 80% of total political dollars.

Goulazian says Katz had projected a total of \$250 million in political spending in spot this year, but estimates that the total will come to less than \$200 million, "about 25% less than was expected."

Jack Oken, president of MMT Sales, figures political spending in spot fell between \$175 and \$200 million this year, with the likely figure closer to the lower than the higher end. Oken projects the '88 figure from an '86 audit assembled by the accounting firm of Touche Ross. The accounting firm audited most markets, with the exception of Los Angeles and a few smaller markets, and came up with a total of \$127 million. Adding the unaudited markets probably lifts the total to \$140 million, Oken estimates.

Assuming that congressional and



Raymond Johns, Seltel

state-level spending was similar this year, adding the Presidential component brings the total to the neighborhood of \$175 million, according to the MMT topper. Oken made his estimates at the end of October, before all the data were in, and he noted that during the past two or three weeks, political spending had "picked up dramatically." So, he added, his figures may be conservative.

William Breda, senior vice president and general sales manager of Blair Television, said October was a "pretty good month" for Blair because of political advertising, though the last quarter is not expected to be sensational, as the newsletter noted.

However, Blair did pretty well in September, which, he said, "carried the quarter." This is because Blair has a large stable of NBC affiliates, which, of course, benefited from the Olympics. Of Blair's 118 affiliated stations, 45 are

Projects a 2-3% increase for spot next year, with indies doing a little better than affiliates.

linked to NBC.

However, in general the fourth quarter looks anything but bright. John "Jay" Walters, president of Harrington, Richter & Parsons, predicts spot will likely be "flat" during the October-December period—though "it's hard to see (the rest of the quarter) at this point"—following an essentially flat third quarter for the industry.

Goulazian says the third quarter was modestly ahead at 5%, with July and August soft and an increase in September due to political advertising, which, however, did not come up to expectations. Smaller markets may have done a little better than average, says the Katz TV chief, but independents had the toughest situation of all, with little or no kids' business. The fourth quarter, says Goulazian, could be a "big disappointment."

Thomas Tilson, vice president and director of sales for TeleRep, said that political spending didn't

William Breda, Blair



Blair did pretty well in September because of its large stable of NBC affiliates.

help much in October, while in November a "hole" appeared, with pacing behind a year ago. He noted that while network TV upfront and scatter markets were strong with all three networks essentially sold out, there was no spillover into spot.

There's not much disagreement among the reps about national spot's outlook for 1989. The increase won't be as "good" as this year, most of them say, which means an increase in the low single digits.

The Television Bureau of Advertising forecasts that spot's increase will fall in the range of 3-5%, a level around which most of the rep predictions cluster. With one exception, none of the major reps see a rise higher than 6% on a "best guess" basis, but a few hold out the possibility of a pickup.

One of the more optimistic evaluators is Harry Stecker, executive vice president of Petry. "There's nothing wrong with spot basically," he argues. "Advertisers recognize its value. The big problem is the slow growth of advertising in general. We're not behind other media [in growth]."

Stecker sees a "modest" 4-6% increase in spot for 1989. While he calls this range "realistic," he finds reasons to be optimistic about the possibility of a better picture.

"In my opinion, spot could go higher than 4-6%," Stecker says. Part of his reasoning is his conviction that what's been happening to spot is cyclical. "Advertising will speed up. Historically, advertising

Pete Goulazian, Katz



*Smaller markets
may have done a
little better
than average,
but independents
had it tough.*

has gone through cycles." One factor that could help spot in '89: "Some advertisers held back because of the Olympics. They should start to come back next year."

On a more fundamental level, Stecker sees "the promotional string running out," that is, clients will cut back on promotion or stop increasing promotion in favor of advertising.

Another optimistic note is struck by Robert Somerville, president of Independent Television Sales, though with an undertone of concern: "Next year has to be better. It can't be worse."

Somerville is betting on a 6-8% increase in spot overall next year, though he says he doesn't have a clear picture of independents alone because of the variety of performances this year.

Somerville tends to think in bigger percentage numbers than the other reps because he handles independent stations only, many of them still in the developing phase. Their increases from year to year must be sizeable in percentage terms, if they're to mean anything. Hence, he can talk about double-digit increases for his stations during the second and third quarters, without becoming enthusiastic, or suggesting there is anything remarkable about it.

Somerville says he sees some signs that the TvB spot development effort—fueled by doubled dues from the reps and the appointment earlier this year of James A. Joyella as senior vice president of national sales—al-

ready starting to bear fruit.

One vein of opinion regarding the future of spot suggests some basic, underlying problems. Says Seltel's Johns, who's projecting a 2-3% increase for spot next year, with independents doing a little better than affiliates, "We've allowed TV to become bastardized."

He's referring to 15-second commercials on the networks: "They're selling them at 50% of the 30 rate and we're selling them at a premium."

Also, says Johns, broadcasters have "allowed" cable and barter networks to grow. The result is that there's a lot of competition and inventory out there. Stations, he says, should say "no" to barter, fight cable harder and affiliates should complain to the networks about 15s. The affiliates aren't using their clout, Johns maintains. "The networks need the affiliates as much as the affiliates need the networks."

'All one pie'

Johns doesn't accept the argument that barter, as a network buy, competes only with other network buys. "It's all one pie," he comments, talking about ad budgets. "If anything is spent for barter, it's that much less for spot and other network buys."

While Johns sees a longterm problem here, some reps see an easing in the growth of inventory, and a change in attitudes toward media competitive to spot. HR&P's Walters feels the "intrinsic values" of spot will inevitably burst through the competitive veil and bring money back to the medium. "Other media happen to be in vogue right now. I think the value of cable is overstated." Walters also believes the increase in promotional spending levels has stopped, though he concedes it has stopped at a high level.

MMT's Oken believes there are built-in limits to 15s and barter. While he notes that there are as many as 3,000 gross rating points a week in barter spots in many markets, he feels barter will slow down. "There are just so many successful barter shows that can be developed." As for 15s, not everyone can use them, Oken points out. □

U.S. TV sky-high over Europe

But are multibillion-dollar predictions real or imagined?

By JACK LOFTUS

Is it good news or just wishful thinking? According to a report by the New York investment firm of Furman Selz Mager Dietz & Birney, the United Kingdom is about to open up to U.S. program suppliers like never before. Quotas on imported programming as well as "collusion" between the BBC and ITV stations to keep license fees low are about to be swept away in a frenzy of competition and viewer demand for a fatter slice of American apple pie.

Well, that's just pie in the sky, according to Paul Fox, managing director of BBC Television, who was in Manhattan recently to accompany BBC chairman Marmaduke Hussey on a tour of the colonies in an attempt to figure out why Americans aren't drawn more to BBC shows.

Neither Fox nor Hussey had anything encouraging to say about the quality of American programming, don't think the emerging European satellite channels (particularly the DBS multi-channel monster Brit-

ish Satellite Broadcasting) will have much impact on the British TV scene, insist that the BBC's first priority is for British not American audiences, say there is no way the British will eliminate quotas against U.S. imports and don't think U.S. programming will have that big an impact on British audiences anyway.

So there!

Nevertheless, two independent studies from U.S.-based companies claim that the Western Europe and U.K. markets are opening up like never before as a rich source of revenue for U.S. program suppliers. Indeed, one study claims that the balance of financial power between shows produced for domestic U.S. consumption and revenues gained from overseas sales is beginning to tilt toward the foreign side of the scale.

According to a study recently released by the New York research firm of Frost & Sullivan, U.S. television program distributors will take in more than \$1.3 billion from

program sales (not including film sales) in 1988, with Western Europe accounting for \$844 million of that total. By 1992, the study says, U.S. distributors will be taking in more than \$3.6 billion, with \$2.7 billion of that coming from Western Europe (TV/RADIO AGE, Oct. 3).

The Furman Selz study, written by Robert L. Wiley III, is a bit more bullish. A good deal of Wiley's sales estimates come from Lorimar Telepictures and Saatchi & Saatchi.

According to the Wiley report, 1987 worldwide spending for U.S. produced TV programs hit the \$1 billion mark for the first time, will near \$1.3 billion in 1988, grow to almost \$1.7 billion in 1989 and to more than \$2.2 billion in 1990.

But look at some of the percentage increases Wiley predicts for Western Europe and the U.K. Her Majesty's kingdom, for example, will see a 100% increase in dollar volume for U.S. imports by 1990; Germany will be up 50%; Spain, where the future of commercial independent programming is still a legislative nightmare, up 92%.

Estimated worldwide (non-U.S.) spending for U.S.-produced television programming by country

(\$ in millions)

Country	1987	1988	1989	1990	Est. rev. growth to U.S. Programmers 1987-90
France	182.0	227.5	284.4	355.5	25%
Canada	142.0	149.1	156.6	164.4	5%
Latin America	131.0	152.0	176.3	204.5	16%
Australia	107.0	128.4	154.1	184.9	20%
Germany	101.0	151.5	227.3	340.9	50%
Italy	60.0	74.4	92.3	114.4	24%
U.K.	33.0	66.0	132.0	264.0	100%
Japan	32.0	35.8	40.1	45.0	12%
Spain	21.0	40.3	77.4	148.6	92%
Philippines	20.0	21.0	22.1	23.2	5%
Other Far East	73.0	85.4	99.9	116.9	17%
Other Europe	62.0	93.0	139.5	209.3	50%
South Africa	36.0	46.4	59.9	77.3	29%
	1000.0	1270.9	1661.7	2248.7	

Source: Furman Selz and Lorimar Telepictures

Comparison of U.S. entertainment companies' foreign television revenues as a % of total

(\$ in millions)

Company	1987					1990 (Est.)					87-90		
	Total Rev.	TV Rev.	For. TV Rev.	For. TV as % of Total TV	For. TV as % of Total Rev.	Total Rev.	TV Rev.	For. TV Rev.	For. TV as % of Total TV	For. TV as % of Total Rev.	Total Rev.	TV Rev.	For. TV Rev.
Columbia Pictures Ent.	1,066.0	594.0	166.0	27.9%	15.6%	2,500.0	790.0	325.0	41.1%	13.0%	32.5%	9.9%	24.8%
Disney	2,877.0	300.0	55.0	18.3%	1.9%	4,333.0	390.0	105.0	26.9%	2.4%	14.5%	9.0%	23.8%
Gulf + Western	4,681.0	550.0	100.0	18.2%	2.1%	6,000.0	730.0	195.0	26.7%	3.3%	8.5%	9.8%	24.7%
MCA	2,590.0	712.0	190.0	26.7%	7.3%	3,600.0	950.0	370.0	38.9%	10.3%	11.5%	10.0%	24.6%
MGM/UA	700.0	345.0	160.0	46.4%	22.9%	1,400.0	530.0	320.0	60.4%	22.9%	25.7%	15.2%	25.7%
Lorimar Telepictures	678.0	445.0	100.0	22.5%	14.7%								
Warners	3,404.0	500.0	95.0	19.0%	2.8%	6,250.0	1,200.0	440.0	36.7%	7.0%	22.2%	33.5%	65.8%

Source: Furman Selz

In the Frost & Sullivan report, U.S. sales to Western Europe (including the U.K.) will grow at a 40% rate per year up until 1990 and then fall off slightly through 1992. The importance of this figure is its comparison to the U.S. domestic output where the dollars are greater but the growth curve much smaller.

F&S says primetime programs supplied to the networks will total about \$1.66 billion in 1988, up only slightly from \$1.53 billion last year. Programming produced for syndication and cable for 1988 resulted in license revenues of \$2.97 billion, or 80% higher than network license fees. However, this combined \$4.6 billion license fee, says F&S, will be growing at a modest rate of 10-15% over each of the next five years, nowhere near the hot pace of Western Europe.

"It seems predictable," concludes F&S, "that by 1995 European program sales may grow to equal those in the U.S.... Given more dynamic growth in Europe than the U.S. and continued demand for American programming there, in Japan and elsewhere, it is quite likely that, for many U.S. producers, the tail will begin to wag the dog."

Most U.S. distributors attending the recent MIPCOM market in Cannes, generally agreed with the Frost & Sullivan predictions. However, most international distributors don't agree with the F&S estimate on U.S. sales to Japan. F&S thinks the \$318 million in 1988 will swell to \$715 million by 1992. While there have been a few U.S. programming breakthroughs into

Japan, that country remains almost as provincial when it comes to U.S. imports as America itself when it comes to non-English language programming.

"I think both the \$318 million and the \$715 million figures are way out of line," said one U.S. distributor.

True value

U.S. distributors have griped about how the license fees they get in the U.K. and Western Europe bear no relationship to the true financial value a program generates in a particular market.

"For years, quotas imposed on foreign (U.S.) programming and monopolistic negotiating practices played U.S. suppliers off against each other," writes Wiley. "Last year, these practices caused the disparity between license fees collected and advertising revenues generated shown below:

U.S.	29.5%
W. Germany	11.5%
France	6.3%
Italy	4.9%
UK	2.7%

Citing one extreme example, Wiley says Columbia Pictures Entertainment got about \$200,000 per episode for *Who's the Boss* in U.S. syndication just in the Los Angeles market alone, vs. \$8,000 per episode license fee in the U.K. with nearly 20 times the number of TV households.

"We see a revolution coming which will change this situation dramatically," says Wiley.

In financial terms, Wiley sees this revolution in the U.K. market resulting in a 100% increase in U.S. sales by 1990.

U.K. spending for U.S. produced TV shows amounted to \$33 million in 1987, doubled to \$66 million in 1988, will double again to \$132 million in 1989 and double again in \$264 million by 1990.

Clearly, Wiley is betting on the success of satellites in the U.K. and prices going up dramatically. He doesn't mention the impact of barter sales.

Wiley uses the Australian example as his benchmark for what's happening or going to happen throughout the U.K. and Western Europe. When all three Australian networks changed ownership and went more heavily into commercial broadcasting, the changes "upset the previous cartel-like buying practices," producing increased competition and skyrocketing prices for U.S. programming.

While not commenting directly on the Furman Selz or Frost & Sullivan reports, the BBC's Paul Fox is skeptical that either the U.K. satellite or cable channels will provide that much of a bonanza to U.S. distributors. He thinks the challenge facing these new commercial outlets will be to come up with enough original programming (i.e. domestic) to attract the British mass audience. And he doesn't think they'll be able to compete against the BBC and home-grown British programs with American sitcoms.

"Most of this talk about the satellite channels is just nonsense," says Fox. □

Comprehensive television study
by Blair, Smith Barney looks to '95

Long-term forecast sees healthy future for TV stations

A comprehensive forecast of the television industry, sponsored by Blair Television and Smith Barney Harris Upham & Co., sees a healthy future for TV stations and a continuing, important role for the TV networks, though on a diminished scale. The study also sees barter syndication ad revenues surpassing those of national advertising on cable.

The 86-page study, titled *Television 1995*: and subtitled *The Future of the Television Industry*, was prepared by the consulting firm of Wilkofsky Gruen Associates. It also predicts that basic cable networks will "flourish" but that pay cable networks will "flounder."

Wilkofsky Gruen, which conducts economic and business analyses and specializes in the communications and leisure industries, projects advertising on TV stations increasing by \$16 billion over the next eight years, reaching a total of \$30 billion by 1995. At that time, it is expected to account for 58% of total TV advertising, up from 56% last year. During that period the

number of stations will "stabilize," benefitting existing outlets in both the revenue and profit columns.

Network growth

The networks will also grow, but not as fast, Wilkofsky Gruen predicts. Revenue will advance by less than half the amount gained by stations—rising from \$8.8 billion in '87 to \$16 billion in '95, and the webs' share of total TV advertising will fall from 36 to 30%. This drop in share "will cost the networks more than \$30 billion in lost potential revenue through 1995," says the WG analysis. But network advertising will grow at a faster rate in the 1990s than during the doldrums of 1985–87.

As for cable, household penetration will tally about 60 million by '95 (60%), with these households laying out \$15 billion in subscriptions annually, the consulting firm projects. Cable advertising, which was estimated at \$1.1 billion last year, will grow to \$3.4 billion by '95 with \$2.7 billion of that on the national level and the remaining \$700 million going to local cable adver-

tising. Basic cable will "thrive," accounting for more than 13% of total TV viewing, but pay cable "will decline in importance."

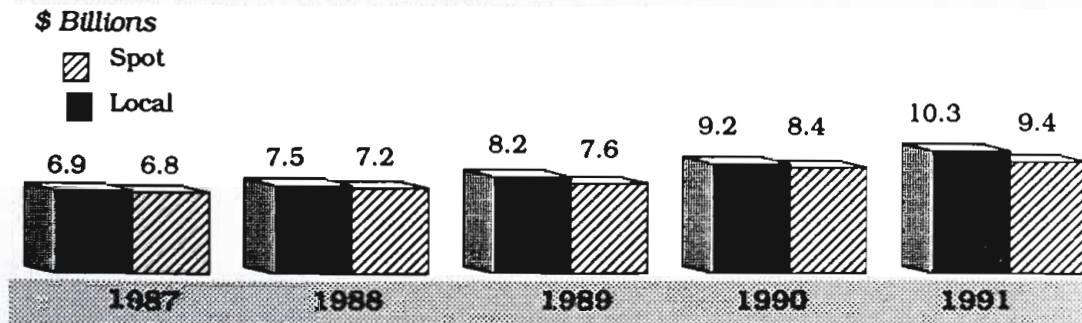
The consulting firm also delved into barter syndication, which it sees becoming a "significant part of TV advertising and program distribution." By 1995, barter syndication advertising will total \$3.0 billion, thus surpassing national advertising on cable. WG put barter syndication advertising at \$730 million last year. The consulting firm also estimates that program syndication revenues will grow at a slower rate than in the past, but will still reach about \$3 billion, which is double the '87 figure.

The WG study even got into high-definition TV, concluding that it will become part of the "television landscape" by 1995 and by early in the next century "will be the major form of television viewing."

The Blair-sponsored study explores the background of TV as well as projecting its future. In setting the stage for its projections, WG points out that the monopoly status of the networks was the result of the FCC's station allocation assignments, "which prevented the development of more than three national networks."

The study goes on to say that the spectrum limitations created by the FCC, including the handicaps suffered by UHF outlets, were overcome by cable TV. As cable grew, UHF stations increased, with most of the UHF stations being independents. "With the number of independent stations more than tripling over the last 10 years, it has become possible for the first time

Station Advertising Revenue



Source: Wilkofsky Gruen.

to gain access to a national audience while bypassing the ABC, CBS and NBC networks or their affiliated stations."

However, the study points out, the number of station assignments is finite, and with the relaxation of the "must-carry" rules, automatic cable access has been eliminated.

In addition, "there has been an over-expansion in the number of stations in recent years." The result: "Stations will undergo a needed consolidation process which will allow faster revenue and profit growth in the 1990's."

With the growth in the number of stations coming to an end, WG

anticipates the total commercial TV station population to stabilize at about 1,000 stations by 1990. In the meantime advertising will continue to flow to independent stations "as the viewing levels of these stations increase." And with the consolidation in the number of stations, the financial base for indies

Television Advertising Expenditures				
(\$ Millions)				
Year	Stations	Networks	Cable	Barter
1988	14,620	9,750	1,300	900
1989	15,800	10,150	1,550	1,100
1990	17,600	10,950	1,800	1,350
1991	19,700	11,700	2,100	1,600
1992	22,350	13,000	2,400	1,950
1993	24,250	13,500	2,750	2,300
1994	26,950	14,500	3,100	2,650
1995	29,900	15,600	3,400	3,000

Source: Wilkofsky Gruen Associates

Television Advertising Growth Rates				
(%)				
Year	Stations	Networks	Cable	Barter
1988	6.5%	10.4%	20.4%	23.3%
1989	8.1	4.1	19.2	22.2
1990	11.4	7.9	16.1	22.7
1991	11.9	6.8	16.7	18.5
1992	13.5	11.1	14.3	21.9
1993	8.5	3.8	14.6	17.9
1994	11.1	7.4	12.7	15.2
1995	10.9	7.6	9.7	13.2

Source: Wilkofsky Gruen Associates

Shares of Total Television Advertising				
(%)				
Year	Stations	Networks	Cable	Barter
1988	55.0%	36.7%	4.9%	3.4%
1989	55.2	35.5	5.4	3.8
1990	55.5	34.5	5.7	4.3
1991	56.1	33.3	6.0	4.6
1992	56.3	32.7	6.0	4.9
1993	56.7	31.5	6.4	5.4
1994	57.1	30.7	6.6	5.6
1995	57.6	30.1	6.6	5.8

Source: Wilkofsky Gruen Associates

will become more solid.

WG's short-term projections for station advertising call for a rise from \$13,730 million last year to \$19,700 million in 1991. The '87 figures, based on McCann-Erickson estimates, show local inching past spot, with local put at \$6.9 billion and spot at \$6.8 billion. Projecting from that base, WG estimates local will grow to \$10.3 billion by '95 and spot will increase to \$9.4 billion.

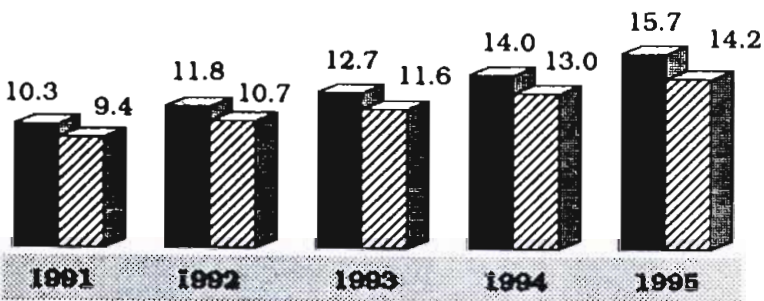
Noting that spot has grown at less than a 10% rate since '84, the study points out that network advertising growth has "plummeted" since that time. To counteract this loss, the study says, networks have been discounting rates heavily. "As a result... some of the advertising dollars which would normally have been spent in spot have gone to the network, but at substantially reduced rates."

This situation "cannot persist," the study says. Once the network and its advertisers adjust to the smaller audience share, the basic annual network growth rate will stabilize at 7%. "This is considerably lower than the 11-12% annual increments the networks enjoyed in the pre-1984 era, but it is better than the 3% growth rates of 1986-'87. Once this adjustment is complete, about 1990, discounting by the networks will diminish and advertising dollars will return to the spot market."

With the spot market revitalized, station revenue growth will increase during the first half of the

Station Advertising 1991-1995

\$ Billions



Source: Wilkofsky Gruen

next decade. By 1995, according to the WG forecast, total station advertising will reach \$29.9 billion, with local billings at \$15.7 billion and spot coming in at \$14.2 billion.

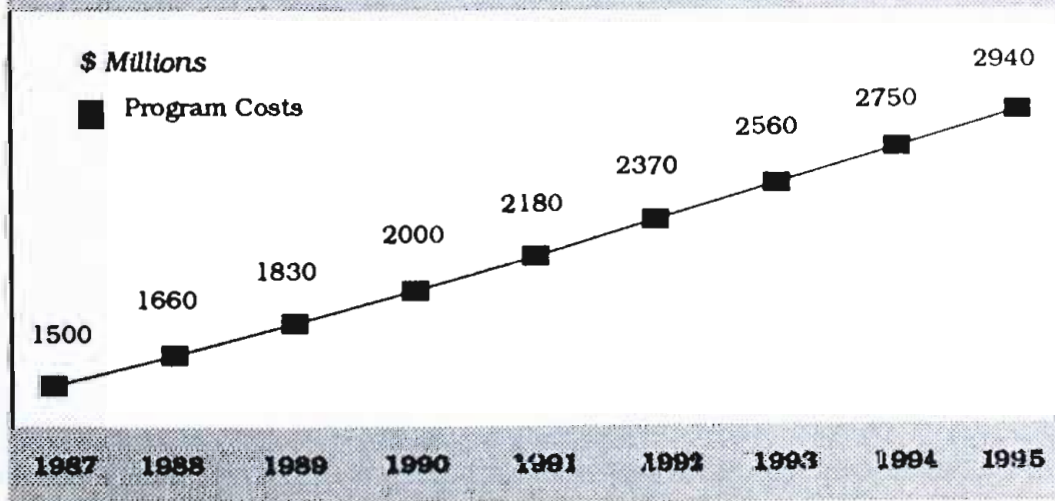
Next, the study tackled the issue of program costs, estimating that they increased from \$349 million in '78 to \$1,500 million last year. Reflecting price increases because of increased demand from independent stations, the program price structure began to meet increased resistance and to encourage new sources of supply. As a result, says the study, TV entertainment costs have grown at a slower rate in the mid-'80s.

Stations will have "even more program alternatives in the 1990s," says the study, encompassing both first-run syndication and off-network programs, particularly half-

hour situation comedies. With the number of stations stabilizing, so will the demand for programming. "By 1991, stations will spend \$2.2 billion on purchased entertainment programs, compared to \$1.5 billion in 1987, and \$2.9 billion by 1995, a marked slowdown in the rate of growth of programming costs."

Meanwhile, with station numbers stabilizing, affiliates will continue to dominate in the short run, says the study. But in the 1990s, with higher quality programming available to indies, the overwhelming advantage of affiliates will diminish. Nevertheless, they will benefit from a revitalized spot market and a growing local market. With advertising revenue growing faster than program costs, margins will increase.

Station Program Costs, 1987-95

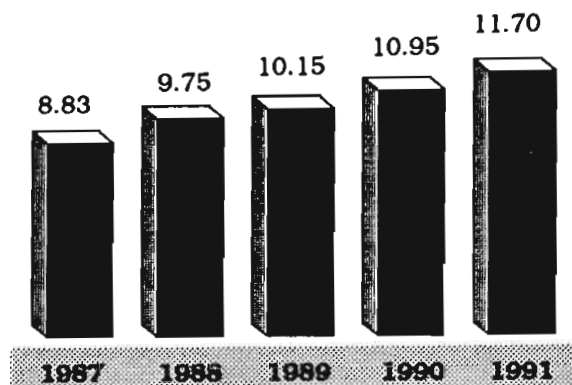


Source: Wilkofsky Gruen

Network Advertising, 1987-91

\$ Billions

■ Network Advertising



Source: Wilkofsky Gruen

The increasing number of independent stations has resulted in higher-cost, higher-quality programming and even the preemption of network shows in favor of higher-rated syndicated programs, the WG study points out, citing *Star Trek: The Next Generation* as an example. This factor, together with cable networks, audience erosion and even some competition

as they appeared in the 1985-87 period."

Near-term, the study sees a growth in network advertising of 7% annually through 1991, with revenues increasing from \$8.8 billion in 1987 to \$11.7 billion in 1991. The increase by year will vary considerably. WG estimates network advertising up by 10.4% in the quadrennial year of '88, then a dip to a

programming than noncable homes. It is also stated that the networks will face increasing competition from non-network programming and VCRs.

Says the study, regarding VCRs, "Although most time-shifting consists of network programming, the broadcast networks lose the ability to foreclose the viewing of independent or cable channels, particularly in primetime when network programming is strongest." The study projects VCR penetration to reach 90% by 1995.

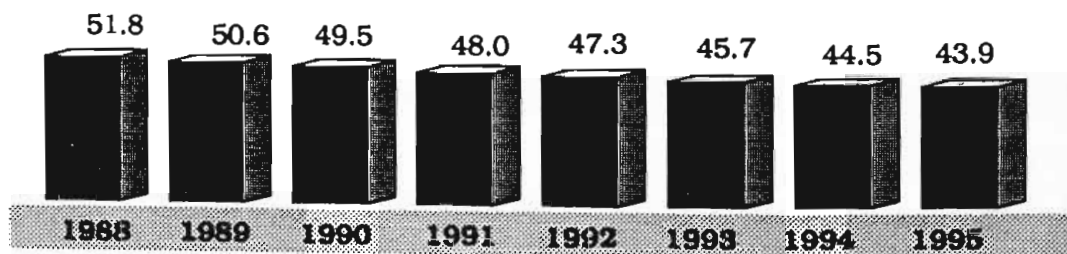
Nevertheless, WG projects network advertising to grow at "mid-single digit rates through 1995," citing the opinion that most of the increase in network competition has already occurred. Long-term increases in ad revenue are projected as follows: Starting with a network ad total of \$11.7 billion in '91, this figure jumps to \$13.5 billion in '93 and to \$15.6 billion in '95.

Networks face the same program supply market as other programmers, WG points out, citing the rapid growth in program costs during the late '70s and early '80s and the more moderate increases in recent years.

WG estimates that network en-

Network Share of National Television Advertising, 1988-95

■ Network Share



Source: Wilkofsky Gruen

from spot, helped cause a shift of ad dollars from the networks. But it happened all of a sudden, the study notes and concludes that "the recent decline in network advertising share was the delayed response to a 10-year decline in the network audience share. . . . In our view, the networks in actuality were not as strong as they appeared in the early 1980s, but not as weak

4.1% increase in '89, a rise of 7.9% in '90 and a hike of 6.8% in '91. But the network share of national TV advertising is seen dropping from 51.8 in '88 to 48.0 in '91 to 45.7 in '93 and to 43.9 in '95.

The long term outlook ('91-95) involves increasing competition for the networks from cable, says the study, which points out that cable homes tend to watch less network

tainment program costs rose from \$1.43 billion in '78 to \$1.99 in '81 to \$2.85 in '84 and \$3.61 in '87. That's an increase of 152.4% over nine years.

With the growth in the number of stations and cable networks tapering off in the next decade and a continuing emphasis on cost control, there will be a further modera-

(continued on page 130)

Television/Radio Age

November, 1988



**THE MOST
U.S. MADE
PROGRAMS.**

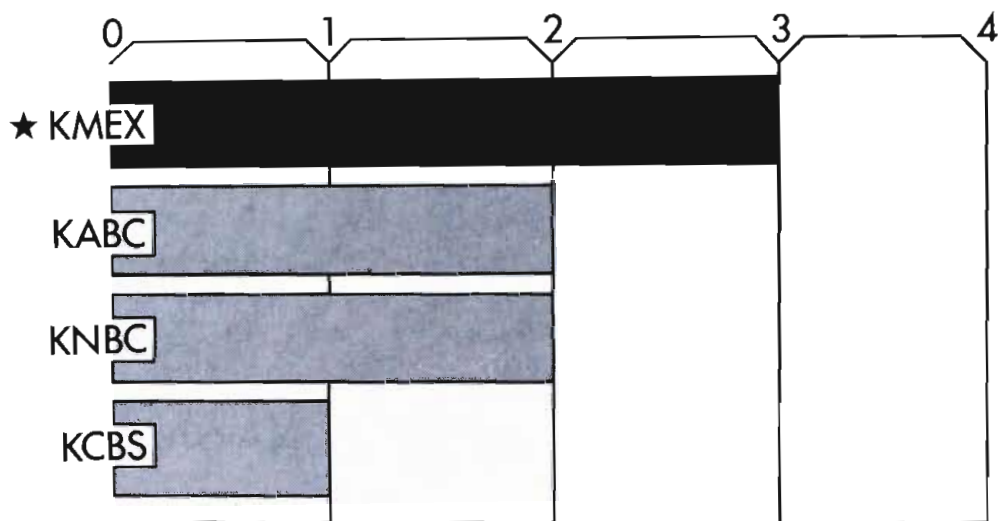
**THE MOST
APPEAL TO
U.S. HISPANICS**

**TELEMUNDO
IS HOT**

Número Uno! **L.A. NETWORK NEWS**

KMEX, L.A.'s Hispanic Market leader, gets knockout General Market numbers.
We tied ABC and NBC for persons 18-49...and blew them away for persons 18-34!
If Spanish isn't part of your media plan...you don't have one!

M-F NETWORK NEWS



SOURCE: LOS ANGELES ARBITRON, MAY '88. (A 18-34 RTG.)

*When it comes to Ratings,
we speak your language.*

KMEX-TV
LOS ANGELES



 UNIVISION

“Because there’s less discrimination against Latinos than other groups, they face fewer barriers to moving where the jobs are.”

Despite growing assimilation, the Spanish language travels as well

Hispanic population follows job market out to the suburbs

By **GEORGE SWISSHELM**

Hispanic-Americans have become one of the fastest growing special markets in the U.S. Now an estimated 21.2 million strong, with total spending power of \$163 billion, according to Strategy Research Corp., Hispanics are also spreading out from their traditional central city locations. They’re following jobs both to the suburbs and to smaller towns surrounding their chief population centers. And they’re settling in new cities as well. Dr. Leo Estrada, professor of demography at UCLA’s School of Urban Planning, reports tracking a number of trends, some bearing further investigation, and others that are more apparent.

One of the more apparent, says Estrada, is “suburbanization of the Latino population. Because there’s less discrimination against Latinos than other groups, they face fewer barriers to moving to where the jobs are. And more and more jobs are turning up in the suburbs.”

SRC’s new 1988 Los Angeles Hispanic Market report documents Estrada’s observations. SRC shows a 34.9% increase in numbers of Hispanics in Los Angeles County

itself between 1980 and 1988, to the point that the county’s 2,787,200 Hispanics now make up 32.3% of Los Angeles County’s population.

During the same period the number of Hispanics jumped 39.2% in Orange County, 42.6% in Ventura County, 52% in Riverside West and nearly 61% in San Bernardino County.

But what Dr. Estrada is talking about is by no means limited to California markets. In Chicago, Jesse Wilson, executive vice president, marketing research director for San Jose Associates, has tracked and mapped upward mobility of Chicago Hispanics based on changing enrollments in elementary schools. Notes Wilson, “Because Hispanic families tend to be so tightly knit, parents don’t want to get their kids involved in long-distance busing. They want them in nearby neighborhood schools. That’s enabled us to follow family movement out of their point-of-entry neighborhoods. These are in the older parts of town with the lowest cost housing that used to be populated mainly by immigrants from middle European countries, whose own kids are now grown and living in the suburbs.”

Tianguis supermarkets in southern California: the real thing



New psychographic research goes well beyond the generalities

New research developments on this country's fast growing Hispanic market include new psychographics available for the first time. These are a product of Hispanic Monitor, the joint venture of Market Development, Inc. of San Diego and Yankelovich Clancy Shulman of Westport, Conn.

Market Development vice president Dr. Henry Adams-Esquivel says preliminary analysis of data from this first attitudinal analysis of U.S. Hispanics shows a market driven by nine attitudinal and motivational factors that can define various consumer clusters, and that "play out in Hispanic consumer behavior and their response to advertising."

Attitude groupings. How can advertisers use these attitude groupings? Roger Sennott, MDI's general manager, explains that one attribute identified is that some consumers are the type who plan ahead for the future while others are more oriented to today. "Thus, a pharmaceuticals company might target the first type for its vitamins. Vitamins help prevent illness and future pain years down the road. But the same company could aim its analgesic advertising at the consumer who sees medicine only as a way to help relieve the headache or whatever ailment he's suffering right now.

"A cosmetics manufacturer would aim its facial cream toward the forward planning woman with a promise that it can help her skin remain young looking years longer. But its lipstick or mascara lines could target the lady who lives for today, because they will help her look terrific for tonight's party."

These, continues Sennott, are ways a company might work in planning media targets. "But our new psychographics can also show the agency's creative teams the benefits of two different copy approaches. If the same brand, for instance has two benefits—one short term, the other longer range—a different copy appeal could be made to each type of consumer."

Sennott adds that these are only

the first steps: "We haven't done it yet, but there's no reason we can't apply our new system to broadcast audiences, the same way Simmons does with VALS. We could form focus groups from each of our consumer clusters with similar psychographic attributes and find out which types of TV programs and radio formats they watch and listen to."

New from Univision are features of its R. L. Polk analysis of Hispanic auto and truck purchasing that for the first time break out each manufacturer's models by type: compacts, mid-sized and luxury models. Also, data from this year's annual Polk auto study will be available on computer disc as well as in its usual printed version.

At the same time, Univision is expanding its matched panels of retail outlets in Hispanic and non-Hispanic neighborhoods to San Antonio's H. E. Butt Stores for the first time. The UPC scanner data showing comparative product and brand purchases by Hispanic and by general market consumers has previously been available from stores only in Los Angeles and San Francisco. And Telemundo has weighed in with a series of new product use studies covering such categories as Hispanic consumption of gasoline, motor oil, diet aids, chewing gum and toys.

Toy buyers. During the current period of disappointing sales for the toy business, Telemundo points to the potential additional market offered by Hispanics, who already spend almost as much as non-Hispanics on toys: \$103.49 vs. \$117.95.

The research, based on telephone surveys by AGB/Information & Analysis, found that Hispanics account for an estimated 11% of all toy sales for children under three and that Hispanics are more than twice as likely to buy dolls than non-Hispanics. Also, educational, preschool and baby toys ranked among the top toy categories purchased by Hispanics, while educational, stuffed animals and preschool toys led the list among non-Hispanics.



Dr. Henry Adams-Esquivel

He explains that these older areas, like south Chicago, Pilsen and Little Village are where most Hispanic families settle when they first arrive in Chicago. "But now we're seeing many more Hispanic surnamed children enrolled in schools in higher-rent areas of better housing like Albany Park, Rogers Park, Melrose Park and Norwood Park."

And on the east coast, growing Hispanic colonies are found in as widely scattered points as Elizabeth and Union City, N.J. and Hartford, Conn.

Strategy Research Corp. also has a new report out on the New York market. In and around New York and vicinity, again from 1980 to 1988, the inner city borough of The Bronx showed a 15.8% increase in number of Hispanics, who now make up 38.9% of the population of The Bronx. And New York County (Manhattan) shows a 21% increase. But Kings County (Brooklyn) increased 17.4% to 460,000. And the climb for Queens was 38.2%.

Across the river, New Jersey's Hudson County shows a 27.8% increase, Passaic's Hispanic population climbed 25% and Union County's jumped 31%. And in Connecticut during the same eight years, Fairfield County's Hispanic population increased 20.4%.

Meanwhile, Jeff Kline, national sales manager for the syndicated Spanish language radio shows *El Dicho del Dia* (*Saying of the Day*) and *Buscando la Belleza* (*In Search of Beauty and Health*) says he can tell from where the phone calls come in to these programs' direct response commercials "that there has to be fast growing Spanish speaking areas in markets like New Orleans and Washington, D.C., too."

And indeed, in Washington, Allan S. Klamer, general manager of WMDO, estimates between 250,000 and 300,000 Hispanics in

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KLFB-AM Lubbock
KZIP-AM Amarillo
KSJT-FM San Angelo
KBIC-FM Alice
KBEN-AM Carrizo Springs
KEPS-AM Eagle Pass
KPAN-AM Hereford
KPAN-FM Hereford
KRME-AM Hondo

FLORIDA

WCMQ-AM Miami
WQBN-AM Tampa

NEW YORK

WSKQ-AM New York

NEW MEXICO

KABQ-AM Albuquerque
KNMX-AM Las Vegas
KBOM-FM Santa Fe

TEXAS (continued)

KVWG-AM Pearsall
KVWG-FM Pearsall
KBOP-AM Pleasanton
KVOU-AM Uvalde

CALIFORNIA

KSKQ-AM Los Angeles
XEXX-AM San Diego
KEAP-AM Fresno
KCVR-AM Lodi
KNTO-AM Livingston
KMPG-AM Hollister
KNSE-AM Ontario

ARIZONA

KSUN-AM Phoenix
KQTL-AM Tucson

COLORADO

KVVS-AM Greeley (Denver)

PENNSYLVANIA

WTEL-AM Philadelphia

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Going authentic in supermarkets

Besides their own language, Los Angeles Hispanics have one more thing that makes them a "special market": their own *supermercados*, called Tianguis.

They were developed by Vons, the west coast supermarket chain, which set its first one up after two years of market analysis and consumer research that included sending a management team to Mexico to "obtain a true understanding of Latino culture and food shopping patterns."

The result is three supermarkets geared specifically to Hispanic Los Angeles. Each includes its own on-site bakery, fruit juice bottling plant, tortilla-making facilities, pharmacy, grocery, fresh fruit and sausage sections, its own butcher shop, a beauty care section and a 3,000 square foot outdoor garden plaza with umbrella-protected tables where patrons can order their favorite dishes from Tianguis' own kitchen.

his market, "scattered in various northern Virginia and Maryland suburbs and towns as well as in the District itself."

Klamer notes that there have long been enclaves of Washington area residents "from every Latin American country. We celebrate 23 different national independence days on our air, including the Fourth of July. But today some of these enclaves that were once relatively small are no longer so small. This market has a great many Cubans and Colombians now. And since 1982 we've had a great influx of Salvadoreans."

Summing up, Richard Tobin, president of SRC, observes, "Hispanics are no longer quite so concentrated in the central cities of their markets of entry like San Diego, Los Angeles, San Antonio, Miami and New York. Hispanics have started spreading out, even beyond Denver and Chicago. We're surveying Hispanics now in markets like Tampa and Orlando, Washington, Detroit, Milwaukee, New Orleans and even Hartford, Conn."

But Tobin adds, "At least as important as expansion into new ar-

eas and growth per se is the quality of more and more of our newcomers. We're seeing more coming in from the middle class, fleeing the internal problems in Central America.

"They're relocating here looking for new business opportunities. Some are entrepreneurs, some are shopkeepers and others are middle management. And there's skilled labor: the drivers and mechanics that come with the construction machinery and farm machinery that more Mexican-based businessmen are renting out to contractors and farmers on this side of the border during planting and harvesting seasons. And every time we do another survey, we find more businesses owned by Hispanics. So far we've found 24,000 in Florida, 29,000 in California and 31,000 in New York State. And of course they all employ Hispanics."

Special market

At BBDO Doug Allgood, vice president, special markets, says the criteria he applies to determine whether a market segment is "special" include distinct demographic characteristics, significant size, population clusters, identifiable purchase patterns and unique media habits.

But on top of these, Allgood points out that Hispanics here have one more attribute so unique that none of his other special markets have it: "The Koreans, Vietnamese and other Asians each have their own separate language. They have to speak to members of each of the other Asian nationalities, as well as to all the rest of us, in English. Only Hispanics, whether their country of origin is Mexico, Cuba, Puerto Rico or Peru, can hang on to their language in this country and use it to talk to each other."

Meanwhile, another trend reported by UCLA's Estrada is "the tremendous number of Latinos, including adults, now attending classes in English as a second language. The question is the use to which they will put English. Is it strictly to get and hold a job? Do most of the adult students of English currently hold an internal job and wish to switch to an external job?"

He explains that an "internal" job is one with a Hispanic business serving a largely Latino clientele. In such a job English helps but is not essential. But he says, "External jobs in the general market, with both Hispanic and non-Hispanic customers, require a higher level of fluency in English."

Dr. Estrada says that one assumption that calls for further investigation is that the recent start of competition between Univision and Telemundo will result in a greater degree of Spanish language retention: "Before Telemundo, if a Latino viewer didn't like what was on SIN, he'd switch to one of the English channels. Now he can switch from Univision to Telemundo, then back to Univision if they don't like the next program that follows on Telemundo. Or the increasing numbers of Latinos now wired to cable can switch to Galavisión."

One measure of the prevalence of the Spanish language in this country is the energy thrown into the countereffort by non-Hispanic groups from California to Florida to turn out the vote for referendums mandating English as the state's "official" language." Said a front-page story in the Oct. 26 *New York Times*: "With 300,000 Hispanic immigrants a year pouring into the south and west, Spanish has supplanted English in some areas, and many Americans who say they feel like aliens in their own country are stepping up the battle to reaffirm English as the language of public life."

More formal backing for the proposition that advertising to Hispanics works better in Spanish is available in the number of studies commissioned by Univision, Telemundo, Spanish language radio groups and reps and Spanish lan-

Jesse Wilson



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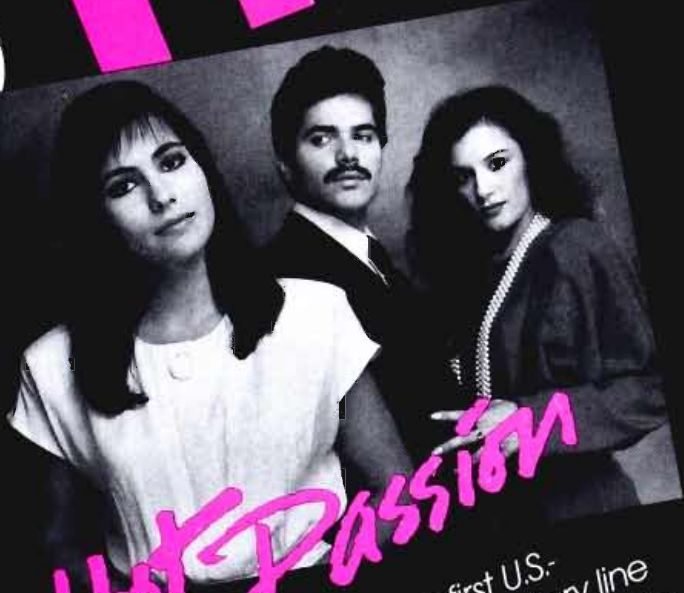


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Top 25 metros ranked by Hispanic population, 1988

1.	Los Angeles-Long Beach	2,373,480
2.	New York	1,509,420
3.	Miami-Hialeah	648,126
4.	San Antonio	586,631
5.	Chicago	533,743
6.	Houston	481,811
7.	Riverside-San Bernardino	399,175
8.	El Paso	352,549
9.	San Diego	341,507
10.	Anaheim-Santa Ana	332,358
11.	McAllen-Edinburg-Mission	306,762
12.	Phoenix	266,797
13.	San Jose	251,579
14.	Dallas	222,840
15.	Oakland	209,996
16.	Brownsville-Harlingen	202,632
17.	Denver	190,325
18.	San Francisco	181,211
19.	Albuquerque	179,590
20.	Fresno	179,041
21.	Corpus Christi	176,396
22.	Jersey City	143,493
23.	Oxnard-Ventura	136,170
24.	Austin	134,431
25.	Tucson	131,101

Source: National Decision Systems, Encinitas, Calif.

guage specialist agencies over the years. But on top of all these are new studies from academia and voter groups, with no commercial reason to slant a survey in one direction or the other. Findings of both support the proposition.

KCOR San Antonio passed along a story from *The San Antonio Express-News*, June 21, 1988, reporting that the Southwest Voter Research Institute conducted a poll of 1,939 Hispanic Texans during the March 8 primary elections. *The Express-News* said the study "showed that a movement to establish English as the official state language is adamantly opposed by Hispanic voters. Over half speak both languages equally well."

KCOR reports that the Research Institute's detailed tabulations showed that "Only 2% of the respondents said they spoke English only. Fifty-three percent said they spoke Spanish and English with equal ease, and 83% said they listen to Spanish radio."

Two other studies of ad selection, ad preference and ad comprehension among matched groups of

Hispanics and non-Hispanics were reported by Dr. Richard A. Feinberg of Purdue University at SRC's February Hispanic Market Seminar in New York.

From flipping quickly through a series of ads in both languages, one comparison confirmed that in 80% or more of the cases Hispanics chose product information presented in Spanish.

In a second comparison, this one of ad comprehension, Feinberg found Hispanics "suffer information overload and made poorer and less effective, less optimal consumer decisions when the product information was presented in English than when presented in Spanish. Both studies confirm that Hispanics are more likely to choose and prefer ads with information in Spanish than English, pay more attention to ads in Spanish than English, and recall ads in Spanish better than ads in English."

And as Feinberg also pointed out, "Success of marketing strategies requires that consumers are exposed to, attend to, and properly comprehend the information you

present. If consumers fail to comprehend information properly, advertisers are wasting a good deal of money and time. Unwise consumer decisions hurt the advertiser and hurt the consumer."

Meanwhile, the latest advance report from the Bureau of the Census is *The Hispanic Population of the United States: March 1988*. It reports Hispanic high school and college attainment levels this year are at all-time highs. Just over half of Hispanics age 25 and over completed four years of high school or more in 1987 and 1988, the highest level to date. Also, 10% of Hispanics 25 or more completed four or more years of college, another record. However, despite these improvements, the report notes that the proportion of non-Hispanics completing high school stands at 78% and that 21% of non-Hispanics complete college, so Hispanics still have a lot of catching up to do.

Slow income gains

The Census Bureau report puts 1987 median Hispanic family income at \$20,310, "not significantly different from 1986, after adjustment for a 3.7% increase in consumer prices. The real median for non-Hispanic families grew about 1% to \$31,610."

Thus, says the report, since the end of the last economic slump in 1982, "Real median Hispanic family income has risen by 6.9%, compared to 12.3% for non-Hispanic families. And at the same time, about 26%, or 1.2 million Hispanic families, were living below the poverty level in 1987, compared with 10% of non-Hispanic families.

On the other hand, the census statisticians found March 1988 unemployment rates for Hispanics at 8.5% and for non-Hispanics at 5.8%, in both cases for persons 16-plus, and in both cases at their lowest levels since March 1983.

The census people also found labor force participation rates for Hispanic women growing from 48% in 1982 to 52% this year. For non-Hispanic women the rates rose from 52% to 56%. However, participation rates for men dropped from 81% in 1982 to 79% this year for Hispanics and from 75% to 74% among non-Hispanics. □

Advertising in the big league

General market agencies put Hispanic into mainstream

By EDMOND M. ROSENTHAL

A sure sign that Hispanic advertising has fed into the mainstream is the increasing activity of major agencies in the marketplace—those that have formed their own Hispanic subsidiaries as well as those that have acquired or affiliated with Hispanic agencies. And these agencies are becoming a major factor in bringing in new clients plus adding more professionalism in such areas as research and media buying.

Still independent, but acknowledging an affiliation could be in his future, Carlos R. Montemayor, president of Montemayor & Asociados, San Antonio, asserts, "The general market agencies realized the Hispanic market is not going to go away, so they had to react to it in one way or another."

While independent agencies still have the edge with major advertisers seeking to do business with minority entrepreneurs, big-agency resources are changing the approach to Hispanic advertising. In the words of Daisy Exposito, senior vice president, general manager and creative director of The Bravo Group, Hispanic market subsidiary of Young & Rubicam, "A lot of it has been judgment calls in the past. You can no longer just say, 'I'm Hispanic, and I know my market.'"

The big-agency edge

Apparently the market is now getting too big for that. According to *Hispanic Business* magazine, more than \$490 million was spent in advertising to U.S. Hispanics in 1987, a 23% increase from 1986 and double the amount spent five years ago. Meanwhile, *The Lempert Report*, a periodic marketing analysis by The Lempert Co., Belleville, N.J. advertising agency specializing in the food industry, estimates ad expenditures in the Hispanic market will grow about 25% a year for the next five years, compared with overall ad spending increases of about 8% annually.

Started in the mid-'70s as Young & Rubicam Latino, The Bravo Group was the first Hispanic division of any general market agency, according to Exposito. She says being associated with a general market agency "opens up a whole range of resources." While Bravo operates independently, it can tap into Y&R's public relations, promotion, and direct mail subsidiaries, for example, "and consult with these people and adapt some of that knowledge to the Hispanic market." It can also look to Y&R's agencies in Mexico and Puerto Rico to gather information on how certain product categories are mar-

keted by them.

About 75% of Bravo's business comes from Y&R clients, Exposito reports. Among them are Warner Lambert for Certs and Dentyne, Chef Boyardee and the U.S. Army. Accounts that Bravo has strictly on its own include Gillette and CPC products.

For Y&R clients, the Hispanic campaigns are fully integrated with those for the general market, says Exposito. She points out, for example, "Hispanics watch both general market and Hispanic TV, and our clients want the campaigns on both to be coordinated."

In some instances, it's the clients

Enjoyment of good food vs. health implications is the message for Mazola from Young & Rubicam's Bravo.



San Jose Associates shows why floors need the shine and protection of Johnson's Future.



that are pushing the agencies into the Hispanic market. For example, Isaac Lasky, vice president—Hispanic marketing for W. B. Doner & Co., Southfield, Mich., said his division was formed in May of last year because “Current clientele were beginning to get interested in the category.” Expressing a need were Eckerd Drug Co., a retail chain, and Campbell Soup Co., which had been a client for Vlastic products but also had its Casera Mexican Foods division.

In the meantime, Doner had become involved in some tactical projects in Texas for Southland Corp. (7-11 Stores), although it has another agency-of-record.

“It makes it a whole lot simpler for the client to have it all under one roof,” Lasky contends. “It seems to be less threatening to them if they don’t have to go and

repeat their strategy to two separate groups. We can also achieve economies of scale—better capability to negotiate with the media, research suppliers and production suppliers.”

Co-op advertising

Lasky believes the outlook is excellent for bringing new advertisers into the Hispanic market, and he adds that retailers are a particularly good category. Recently his agency was able to convince Highland Superstores, Plymouth, Mich., of the opportunities in the market, he says, and Doner is now in the final creative stages of the chain’s campaign.

Even though retail is a fast-growing category, few Hispanic agencies appear to be even thinking about utilizing co-op advertising funds.

Lasky is the exception, saying, “I see co-op being used very efficiently. In our retail accounts, it’s part of life—but, for Hispanic advertising, it’s still in its super-infancy. Manufacturers don’t supply funds as willingly for the Hispanic market; it takes some convincing by the retailer.”

Meanwhile, acquired and affiliated Hispanic agencies appear to be operating more autonomously than those formed within the general-market agencies. For example, Publicidad Siboney has a strong tradition of its own. It was formed in Cuba in the early ’50s, shifted its base to Puerto Rico in 1962, subsequently spread to 11 Latin American countries and opened shop in the U.S. in 1981. About three years later, it became involved with Foote, Cone & Belding, which has majority ownership of Siboney internationally and a minority position domestically.

Total autonomy

Sara Sunshine, Siboney’s vice president—creative director, says, “They have resources that are very helpful, but we still have total autonomy concerning the output of our work. We have accounts in common, but our advertising is totally catered to the needs of the Hispanic community.” She says a common account’s general market campaign will be analyzed to see if it’s appropriate for the Hispanic market, “but most of the time it doesn’t work.”

In the case of Conill Advertising, according to Carlos Rossi, chairman and CEO, the only difference between being independent and being part of the Saatchi & Saatchi Affiliate Group in the U.S. is that, “We have employee benefits that we may not have had in the past.” Conill, which had been one of the most substantial independent Hispanic agencies, initially went under the AC&R/Rossi banner in a joint venture with Ted Bates but became part of the Saatchi Affiliate Group when Bates was sold to Saatchi two years ago.

Rossi says Conill has no interface with the general market agencies in the Saatchi stable: “We could, but we feel we would lose our autonomous status. We have picked up

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some clients that just happened to be Saatchi clients, but I'm not sure we don't get the same amount of referrals from Saatchi's competitors."

Rossi points to a major benefit of autonomy: "There are often questions as to whether you're Hispanic owned and operated. That question is coming up more and more from quasi-government operations—anyone who has a government contract. These are people who have to fill out a paper showing they're doing business with companies owned by minorities.

"We're first Conill; we're not Saatchi & Saatchi/Conill. We don't have any management over us saying we can't do this or that. There are no questions of conflict of interest. As part of a larger agency, you end up just being an adjunct to a bigger plan, and you're not sure that you ever get the client's com-

mitment. We still have to fit into the client's overall objectives, but the execution is our own."

To Montemayor in San Antonio, the movement of larger agencies into the Hispanic business is cutting off the supply lines for the independents. "If the client is served by a larger agency, he's going to go with what they recommend," he notes. "The ones that seem to be working best is where a large agency buys all or part of an existing shop."

He believes that most successful Hispanic agencies will be bought by general market agencies in the future, noting, "The options for me are either to leverage the one national client I have—Chrysler—into more national business or go into a larger agency." He discloses he's had some talks with larger agencies but that "nothing concrete" has evolved.

Siboney says, "Colgate—because you have someone to smile for."



At another independent, San Jose & Associates, Chicago, executive vice president Jesse G. Wilson sees the big-agency movement as generally beneficial to Hispanic media: "They're responding to their clients' needs, and they can bring in new clients from their existing clientele. There aren't that many new Hispanic-owned agencies out there that can bring in that volume of business. It takes at least five years to get to the point where you can bring in major accounts."

And he doesn't see the arrival of the major agencies as dangerous to the smaller agencies: "When they buy out the Hispanic agencies, they impose a general market approach. We still offer a different flavor, which emanates from the Hispanic approach to doing business. It's more from the creative side."

Adequacy of research

While the larger agencies may be attempting to bring a greater degree of sophistication into such areas as research and media buying, they're encountering some frustration. Exposito of The Bravo Group says, "Quantifying sales of products to Hispanics is still difficult, and Hispanic agencies still have to get more sophisticated in developing strategies."

Audience measurement still doesn't give a true picture of the Hispanic listener, she says, noting that, with Strategy Research Corp's door-to-door measurement, for example, "you can get 400 gross rating points with only two spots a week, and we all know that two spots a week are not enough."

Bravo's media supervisor Olga Hoffman says there's been an improvement in audience measurement since Arbitron, Birch and SRC have all been doing radio measurement. "We're now using Arbitron—strictly as a guidance tool—but we don't consider it the be-all and end-all," she comments. She notes Bravo is now in discussions with the Y&R research department to have it evaluate which of the services comes closest to accurate measurement.

Additionally, Hoffman asserts, "There's little available to help us track Hispanic sales. The smaller items—mostly drug items and oth-

er non-foods like cigarettes—tend to be bought in areas where Hispanics work vs. where they live. Their purchases in non-Hispanic parts of town may have been motivated by Hispanic advertising, but they're not credited to it."

"Nobody is truly satisfied with the research available," contends Lasky of Doner. "The Hispanic media are lacking in certain research such as psychographics; the same research in the general market has taken 30-40 years to compile."

Rossi of Conill points out that Arbitron and Birch measurement rely on demographics based on percentages of the general market Census sample, which results in a sample so small that there are large variances from one rating period to another: "A station can be No. 1 in one book and totally disappear in the next. Except with SRC's door-to-door technique, which may show a 50 rating and suggest that you can achieve your objectives with one spot, radio ratings tend to be understated."

"We still tend to adjust what we get from the rating services with other reasons for buying a station. Instead of saying we're glad they're so cheap, we insist on good programming and cost-effectiveness. For clients that have been there for a while, you're able to establish a certain number of GRPs needed for the product."

Grass-roots marketing

TV and radio stations are doing a better job of giving the advertisers reasons to buy them, Rossi notes: "In the past, they just sold on the basis of the advertiser having to be in the Hispanic market. Now, they can give them something more tangible. They're providing such things as product indexing and better coordination with the client in terms of adapting the programming to the client."

In San Antonio, Montemayor is better able to measure results through grass-roots marketing than with ratings. He points out that KCOR(AM), "the oldest Spanish-language station in the U.S.," has been prominent in the market since its launch in 1946—"yet it can be way up in one book



Hispanic star Lucy Pereda stands up for Eckerd drug stores in Miami in W. B. Doner spot.

and nearly disappear in another."

Station promotions tell a more accurate story, Montemayor observes: "If a station puts on a fair and 45,000-50,000 people show up, that's evidence that it has an audience. We do a lot of in-store promotion where we can see how the stations drive people into the stores."

Wilson at San Jose says, "When major accounts come in and spend \$1 million or \$2 million in Hispanic media, they're going to use more sophisticated quantification techniques. But you'll still find agencies like us that buy more in terms of programming, positioning of the stations and the number of spots needed to achieve reach and frequency."

Despite research inadequacies, agencies still agree that broadcast is by far the medium of preference for reaching the Hispanic market. But Bravo's Exposito sees print getting more of the budget as better vehicles are developed. For now, she notes, "There's still a need for a Hispanic publication with a major circulation."

She notes the newspaper insert, *Vista*, and *Hispanic* magazine are both in English. So far, *Selecciones*, the Spanish-language *Reader's Digest*, has the biggest circulation—about 130,000, but Exposito observes there are more than

20 million Hispanics in the U.S. For now, she says, the best print buys are "some very good local publications in Miami."

On the plus side for broadcast, according to Bravo's Hoffman, is the fact that it's tailoring itself better to Hispanics who live in the U.S. and to specific demographics. She considers Telemundo's U.S.-produced novela about Hispanic life in the U.S., *Angelica, Mi Vida*, to be the forerunner of a major and vital trend.

In radio, she says, the splintering into such formats as *ranchero* (Hispanic country & western), oldies and international—and more English-language music for younger listeners—is making demographic targeting easier. "Now, you don't just buy one or two Spanish stations in a market. You target a demographic," she points out.

Lasky at Doner estimates broadcast is getting 90% or more of the Hispanic media budget, but adds, "I think it will diminish a little bit as a percentage as new print media are developed." Montemayor says that in Texas, a radio buyer can almost put together an unwired network in the Tejano (Texan) format. He says nearly every market in the state has a station that concentrates on this rock 'n roll music with a Mexican-American beat. □

Markets showing greatest gains tend to be the oldest and biggest

National radio sales growth shows a spotty picture

National radio billings targeted to U.S. Hispanics last year reached \$48.8 million while local radio dollars aimed at Hispanic listeners came to \$114 million, according to estimates by *Hispanic Business* magazine.

But how national spot is faring this year on Spanish-language radio depends on which rep one asks. Caballero Spanish Media and Lotus Hispanic Reps, which pioneered national sales for Spanish-language radio, both report '88 billings to date ahead of last year's but not dramatically. The new boys on the block, Katz Hispanic Radio Sales and the house rep for Spanish Broadcasting System, say they're

doing much better. They have shorter station lists, more concentrated in the larger Hispanic markets. Rick Kraushaar, president of Lotus, says so far this year the stations Lotus sells for are only a little ahead. But for the future, he adds, his client stations "have two things going for them. One is the new programming we'll be supplying our satellite-connected affiliates. The other is the more professional image now associated with Spanish-language radio industrywide and the growing recognition of the importance of Spanish-speaking consumers as a market."

Also looking ahead, Eduardo Caballero, president of Caballero

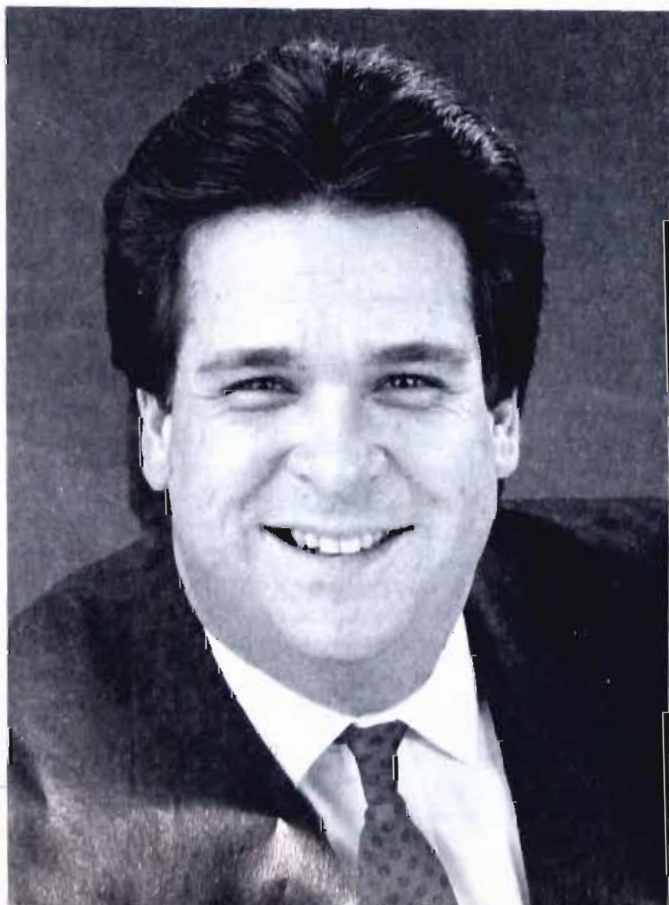
Spanish Media, sees Spanish radio getting a better shake in the ratings now that "Birch is following the recommendations of the SRAC [Spanish Radio Advisory Council] and will be improving its sampling methodology."

But right now, says Caballero, the economies of Texas' "older" Hispanic markets—San Antonio, El Paso and other markets along the Rio Grande Valley, are doing better than those of the "newer" Hispanic markets like Houston and Dallas-Fort Worth. The latter have become significant Hispanic population centers only within the past 20 years.

The result, he says, is that radio's business has been good in the Rio Grande Valley markets but not that good in Houston. "And it's been good for our California markets and for our Florida markets."

Katz Hispanic general manager Gene Bryan describes his stations' business as "terrific: The major package goods corporations like Procter & Gamble and Colgate are on Spanish language radio. Their brands are among our hottest categories, along with fast food chains, health and beauty aids, movies—both Spanish- and English-lan-

Gene Bryan, Katz Hispanic



Major package goods brands are hot on Spanish-language radio, along with fast food chains, health and beauty aids, English- and Spanish-language movies and major retail chains.

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"It's surprising that it's taken Spanish radio so long to sign up the bottled waters. 'Montezuma's revenge' is not unique to Yankee tourists. It hits everybody."

guage films—and major retail chains like Sears, J. C. Penney and Montgomery Ward."

Julio Omana, who heads the rep division of Raul Alarcon's Spanish Broadcasting System, reports business for the SBS stations in Los Angeles, New York and Miami "approximately 30% ahead of last year." And he says he's close to signing additional non-SBS-owned stations for his rep arm in two or three more markets.

Caballero meanwhile has been upgrading its station list, resigning some weaker clients and picking up stronger stations in their markets. In Chicago, Caballero will be representing new station WMXA, expected to bow before year's end.

Caballero observes that, while the bulk of Hispanics are still concentrated in their traditional high density areas, more powerful stations like WMXA will reach those who do move farther from the central cities. The same, he adds, applies in Los Angeles "where the stronger signal of combinations like KTNU/KLVE(FM) enables them to be heard in outer areas where some of their competitors cannot."

Meanwhile, Katz Hispanic has added KALI Los Angeles, and Bryan reports such major Hispanic markets as Los Angeles, New York, Miami, San Antonio and Chicago "showing major increases." But, he adds, "So are markets like Tampa, where Spanish language broadcasters sponsored research to show the dimensions of their market there. Since this SRC [Strategy Research Corp.] study was published, advertisers have increased their Spanish language ad investments in Tampa almost 50%."

Bryan says he "can only encourage stations in other markets to get behind studies like Tampa's. Even if they are competitors, it will pay every Spanish station, radio or TV, in a market to join forces to support research on their market like Tampa's. This is the kind of thing that can make this whole business grow and prosper."

SBS' Omana says six to 10% of his stations' revenue gain is from returning advertisers, "but the bulk of our 30% increase is from new advertisers such as Boar's Head premium deli meats and four new advertisers from the bottled water category."

Omana adds, "It's surprising that it's taken Spanish radio so long to sign up the bottled waters. 'Montezuma's revenge' is not unique to Yankee tourists. It hits everybody. So bottled water has long been a common and familiar consumer product in many Latin countries."

Manny Ballesterio, national sales manager at Caballero Spanish Media, notes that more movies are being produced that are relevant to Hispanic audiences. He says the distributors "are using Spanish radio more often these days and coming in with bigger budgets."

Among the bigger box office draws in Hispanic communities have been *The Milagro Bean Field War*, *Stand and Deliver*, *La Bamba* and *Salsa*. Ballesterio says the distributors "have joined the growing number of other categories who have seen for themselves that radio follows its listeners wherever they go: in their cars, at their places of work, in the stores where they shop, in the beauty shops and even out on the street with their headsets."

Caballero reports some agencies asking for specific demographics,



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Rick Kraushaar, Lotus

There's a more professional image now associated with Spanish language radio.

“though not to the extent that they do in the general market. Our slice of the ratings services’ samples is not yet large enough to assure the accuracy needed to split up a Spanish station’s total reported listening by subgroups and do it reliably in a way that shows stability from one book to the next. However, we should do better in the future with the new Birch sampling changes. When demos are specified, it’s most often for women 18 to 49 or for adults 25 to 54.”

Like Caballero, Omana also says more buyers are requesting specific demographic targets but warns, “What works in the general market may not always work the same way in our market.

“Take toys for young children. In the general market, the target is often young mothers, 18 to 34. But in close-knit Hispanic families, it’s often the grandmother who spoils the kids and buys the toys. In our case, a broader, 18-to-54 target that includes the grandmother can work better.”

Katz’s Bryan sees more advertisers and agencies “now aware that Spanish radio has grown, that more stations are on the scene, and that more of them are now differentiating themselves by format to reach different age and income groups. This means that in more cases we’re finding buyers receptive to a conceptual sell as well as to the straight numbers sell.

“This means even in markets where our station may not always be No. 1 in every book, we can point

to their format and audience differences, their facilities, personalities, promotions, and anything else a station does that makes it not just different, but different in a way that makes it special to its listeners. This is the same thing people selling general market radio do to get their stations on the buy. Agencies and advertisers are interested. They’re receptive to qualitative information along with the quantitative. They’re taking the time to look at both.”

Meanwhile, adds Bryan, “We continue to work to educate two more target advertiser groups: those currently using general mar-

ket radio but who are not yet on Spanish radio, and those using Spanish language television who are not yet on Spanish language radio.”

Caballero is chairman of the 4A’s Hispanic Committee for a Drug Free America Council. As such, he’s organized Spanish language radio stations, TV stations, newspapers and specialist agencies to pitch in and says, “we’re all glad to help. We welcome the 4A’s invitation, both to help in this important effort and as a sign of wider recognition by more general market agencies of the need for Spanish language messages to *unsell* the Hispanic public, just as English-language messages are needed to *unsell* the English-speaking part of the public away from drug use.

“Yet, at the same time, some 4A’s member agencies keep trying to persuade their clients that they can advertise effectively to Hispanics with English-language messages in general market media. I suppose half-recognition of the need for Spanish-language advertising is a welcome step toward eventual full realization of marketing reality. In the meantime, we will continue to urge advertisers to ask themselves how relevant their messages created for their English-speaking customers sound to their Spanish-speaking customers.”

—George Swisshelm

Eduardo Caballero



The economies of Texas’ “older” Hispanic markets are doing better than “newer” ones like Houston and Dallas-Fort Worth.

TV webs go North American

U.S. productions seen wooing viewers back from Big 3

By ROBERT SOBEL

“Made in the U.S.” appears to be the slogan being adopted increasingly by both Telemundo and Univision, the two major over-the-air Spanish-language networks. In fact, Telemundo is boasting that some 45% of its programming—including local efforts by its owned stations—is U.S. produced, while Univision asserts that its U.S.-made programs represent about 30%, using the same yardstick.

The reasons for the acceleration in going U.S. in production, either by their own hands or in acquiring outside product from other producers, is obvious: the Spanish-American market is reaching new heights in both viewership and advertising, and programming has begun to reflect that shift.

Room for two

But despite their competing operations, Telemundo and Univision executives believe there is room for both to not only survive but to do well. Telemundo Group's Donald G. Raider, chief executive officer and executive vice president, says “There is clearly room for both networks. There are more than 20 million documented Hispanics in the U.S. We see our major competition coming from the three major networks—ABC, CBS, and NBC—independent stations and cable systems that might attract the Spanish viewer.

“Our job is to bring back those viewers to Spanish-language television, and I would trust that Univision would feel the same way—as to that's where our competition is.” At Univision, Rosita Peru, vice president, director of programming, also sees things the same way. “The Hispanic market is very large,” she says, “and needs a large supply of entertainment and news.” The market, she points out, is growing five-and-a-half times faster than the general population. It's younger; its disposable income

is growing, which means there are a number of ways to attract this marketplace.

“Ultimately, the viewer ends up being the winner, because they have options, and they have more advertisers going after their disposable income. And when there are more advertiser dollars being spent in the Hispanic market, it means the quality of programming will improve. Once we move past the 1% of advertising dollars that is spent in the Spanish media, you will continue to see the progress and development of Spanish-language TV programming.”

As to competition, Peru views the Anglo broadcast networks and the other groups as “first and foremost” rivals of Univision because of the large number of options available to U.S. viewers. “And given the generational spreads in the Spanish community, it's Univision's challenge to maintain strong Spanish-language viewership among all Hispanic demographic groups.”

But despite the claims of coexistence by both network executives, there's little doubt that both continue to sharpen their programming, making changes that reflect competitive positioning. At Telemundo, Raider says the network has cut down its novela program-

ming to three from some 10 or so of a year or two ago, giving Telemundo more of a balance of programming that not only focuses on core product traditionally used in Spanish-language broadcasting but on grabbing more U.S. Hispanics that are younger and more forward-looking.

He maintains that this is being done by going heavier with programs that are originated and produced in the U.S. for the Hispanic viewer. Of the 71 hours of programming run each week, 45% are of domestic origin, he says. “We feel that that number will be at least on that level as we go forward into the next period.”

But Peru at Univision maintains that its network, too, has a large number of domestically produced shows—as noted previously, some 30%. “There is a lot of diversity on Univision. The 24-hour, seven days per-week schedule confirms that. And novelas continue to consistently get the highest ratings. Among the top 10 shows, four are our novelas.”

Univision has gone U.S. via such things as *Hablemos de Cine*, a half-hour weekly series, airing on Sundays, that reviews and rates English- and Spanish-language upcoming and current movies. The production, which began on Oct. 16

Telemundo novela is shot in New York, Miami and San Antonio.

“Angelica, Mi Vida”



Katz exec sees local programs filling gaps

John Cuddihy, director of Katz Hispanic TV Sales, the only outside sales rep for Spanish-language TV stations on an ongoing basis, sees the southwest providing an opportunity for Spanish-language programs in markets where Univision and Telemundo are not penetrating heavily. In its fold are the Lorimar Television owned station in Caguas, Puerto Rico, WLII-TV, Spanish-language outlet which airs a quantity of dubbed programming from Lorimar, plus eight stations in the U.S. Cuddihy notes that the eight stations consist mostly of network affiliates that run Spanish-language programs.

One program Cuddihy points to is the locally produced weekend show, *Domingo*, which has had a 25-year run on KIII(TV), ABC affiliate in Corpus Christi. "The show does gangbuster, double-digit demo ratings among Hispanics," says Cuddihy. *Domingo*, which airs on Sundays, from 11 a.m. to 12:30 p.m., is the No. 1 Spanish-language show in Corpus Christi, according to Arbitron.

Domingo, says Cuddihy, stars two local disc jockeys and features primarily music but also includes news and information.

Another show that Cuddihy is particularly high on is *Aqui Rogelio*, which airs on Sunday mornings on KGBT-TV, CBS affiliate in the McAllen-Brownsville, Texas mar-

ket. The program is hosted by Rogelio Botelio Rios and has been running for 15 years. *Aqui Rogelio* also consists mainly of music, but, in addition, Rios interviews local community figures.

Here's Johnny. Another host and another program that Cuddihy considers as top-line are Johnny Canales and his hour program, *The Johnny Canales Show*, on NBC affiliate KGNS-TV Laredo, from 10:30-11:30 p.m. on Saturdays, which has been getting 8 and 9 ratings. The station is so bullish on the Canales show that it preempts *Saturday Night Live*.

The strength of Univision and Telemundo are not in the southwest, notes Cuddihy. "It seems to be in Florida, New York and Cali-

John Cuddihy



fornia, so Spanish-language programs "provide a real service to the Hispanic community, particularly the music/variety type, to fill that need. The programs have real local appeal."

In demos, programs such as *Domingo* are hitting a target audience, continues Cuddihy. Not only is *Domingo* getting a 10 in household ratings, but in women 18-plus it's achieving a 15, and in men 18-49, *Domingo* gets a 19. It also does very well with teens, he says.

Dubbed off-network shows are also drawing some attention, according to Cuddihy, and in El Paso, KVIA-TV, ABC affiliate, has begun airing Spanish-dubbed versions of *The A Team* and *Knight Rider* in a two-hour block from 8:30-10:30 a.m. on Sundays. "Viewers have just begun to sample the programs, so the acceptance of the shows is still too early to judge," he points out.

Cuddihy sees more local shows similar to *Domingo* and *Aqui Rogelio* being produced. He adds, "Although our stations deliver a high Hispanic viewership, we know that the Hispanics speak English as well, so some of these shows will probably have a lot of English in them—as well as Spanish—down the line. For example, we will probably see an English version of *Domingo* that is geared to the Spanish market."

at 5 p.m. (EDT), is done in Hollywood. The pilot had aired on KMEX-TV Los Angeles, one of the Univision-owned stations, and was an instant success, says Peru.

Another Hollywood-produced series, *Desde Hollywood*, comprising celebrity interviews, show business news and film previews, made its debut in March. The weekly show runs on Tuesdays at 2:30 a.m. But perhaps one of its bigger audi-

ence-getters is *Sabado Gigante*, TV game show, which began on the network in November 1987, jumping 62% in total household ratings and earning a 47 share in the February 1988 sweep. The three-and-a-half-hour Saturday block is seen by more than 3.9 million viewers of Univision, according to Peru.

Also, Univision airs *America* from Washington on Thursdays from 10:30-11 p.m., with segments

produced from various parts of the country. One of its newest domestically produced programs is *TV Mujer*, a magazine show which made its debut on the network on Sept. 12. The one-hour noon program is geared to Hispanic women and offers a diverse range of topics such as cooking, health, child care and personal beauty. It's cohosted by Lucy Pereda and Gabriel Hudson-Artigues.

Among the Telemundo made-in-the-U.S. shows are a cooking show, which starts off Telemundo's schedule at 11:30 a.m. and is produced in Hialeah, Fla. at Telemundo's studios; game shows; a magazine series; and a novela, which is shot on location in various U.S. cities.



"Voltron" on Univision



Laura Fabian *Angelica Mi Vida*
Braulio Bralio *Angelica Mi Vida (Theme)*
Julia Iglesias *Music Specials*
Emmanuel *Music Specials*
Jose Luis Rodriguez *El Puma*
Lana Mantalban *Informador 47*

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Source: Arbitron 1972 through 1988 to date.



Telemundo's "Cocina Crisco"

In the magazine area, the network airs *Dia a Dia*, from 5-6 p.m. daily, with a format that contains segments on beauty, health, news, sports and weather.

The novela, *Angelica, Mi Vida*, shot in New York, Miami and San Antonio, was introduced a few weeks ago on Telemundo and airs in the 8-9 p.m. time slot daily. Raider calls *Angelica* the "first true novela that depicts the lives, loves and trials, primarily of three families, Mexican, Puerto Rican and Cuban, living in the U.S."

In a marked departure from other previously aired novelas, the talent used for *Angelica* was not made up of well-known novela actors. "We introduced for the first time in the U.S. all new Hispanic-American talent, who had either been on the stage or commercials or had appeared in similar types of novelas. All told, there are 21 people coming to the screen. Lora Fabian is the female lead, and Carlos Montalvo is the male lead.

"The program has come out of the box quicker than our expecta-

Univision's "TV Mujer"



Telemundo gains in coverage

Telemundo's affiliate lineup is growing sharply and now totals 13. All-in-all, including its owned stations, the network's coverage currently exceeds 71% in U.S. Hispanic households.

Two of the most recent licensees of Telemundo are XHRIO-TV, the dominant station in the McAllen-Brownsville, Texas market, and XHIJ-TV, serving El Paso. Before becoming Telemundo affiliates, both stations were represented by Telemundo for advertising sales.

Two other stations recently signed affiliation agreements with Telemundo: KLDO-TV, ABC affiliate in Laredo, and WSNS-TV Chicago. Also in Texas, Telemundo is financing the construction of a \$6.5 million TV station in San Antonio, which will become a Telemundo affiliate when the station airs in June 1989. The network has an option to buy the station.

Don Raider, executive vice president and CEO of the Telemundo Group, sees the addition of the stations as strengthening Telemundo's presence in the southwestern U.S.

Together, the McAllen-Brownsville and El Paso markets represent 5% of the U.S. Hispanic households and are, respectively, the eighth and ninth largest Hispanic markets in the U.S. Both will carry the full Telemundo programming schedule.

With the addition of San Antonio, the network will have stations in the top 12 U.S. Hispanic markets, including Albuquerque, which is expected to begin airing in December. Telemundo owns and operates in five of the seven largest Hispanic markets in the U.S.: New York, Los Angeles, Miami, Houston-Galveston, and San Francisco-San Jose.

tions and is doing super-well in all the markets." While there was concern initially because the novela is considered a breakthrough, in that not only are unknown actors used, but that novelas have been imports traditionally, it is strongly supported by P&G, Coors and other advertisers. "*Angelica* has come out with higher ratings than any other novela introduced on the network," says Raider.

The cooking show, *Cocina Crisco*, which begins at 11:30, comes on before the lunch period, notes Raider, "for the housewife who can see new and exciting recipes of various Spanish cultures." Also, a celebrity does a recipe. Raider believes the name of the program is instrumental in attracting viewers and advertisers. "It is primarily underwritten and sponsored by Procter & Gamble, which makes Crisco."

The game shows run in a one-hour block, beginning at 4 p.m.: *Uno Nunca Sabe*, a hidden camera show, followed by *Adivinelo Consenas*, charade-type show. Both have exceeded 50% of the share of the audience in that time period, says Raider. Both shows are produced by Intertel Espan. Dan Enright is one of the principals in Intertel. On Fridays, Telemundo car-

ries *MTV Internacional*, which began running about two months ago, from 9-10 p.m., with a repeat on Saturday plus a fight card from 10-11.

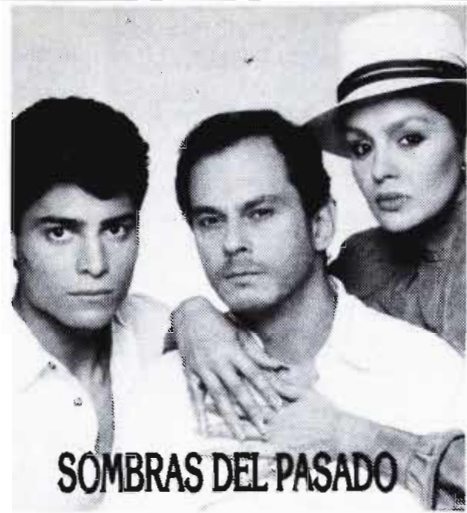
MTV Internacional, according to Raider, will be produced by MTV and is a show that combines Anglo and Hispanic videos by artists such as Los Lobos and The Miami Sound Machine. The Friday night bouts premiered on Oct. 14 in a fight-of-the-month, produced exclusively for Telemundo. Venues include Atlantic City, and Las Vegas.

Weekend sports

The deal is with Top Rank Sports, and Raider says the show represents the first live U.S.-Hispanic produced fight of the month on TV. After the October bout, November and December will be dark, but fights will pick up again in January and will run every month thereafter.

Also in sports, the weekends contain a two-hour block, *Des Sportez del Telemundo*, long-running sports program, from 4-6 p.m. Events are soccer, baseball and a summary of sports played during the week. The show is produced by Telemundo's facilities in Hialeah.

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**"Día a Día"
on Telemundo**

Resumen Semanal is the name of a weekend summary of the highlights of the news of the week. It airs on Saturdays at 10 p.m. and is produced by Telemundo and CNN.

On Sunday, U.S.-produced shows include a 4 p.m. show, *Su Estrella Favorita*, from Miami, via Chego Productions, a music/variety program. *Estrenos y Estrellas*, an entertainment and soft-news show, is also produced in Hialeah, and another U.S.-made product is a music/variety show.

In non-U.S. produced shows, Univision has a full slate, including a new checkerboard of 10 sitcoms from 2-3 p.m. Introduced on Oct. 3, the block consists of such programs as the amorous antics of a doctor, *El Doctor Candido Perzi*, *Pirruiris Presenta*, centering on a renowned Mexican comedian, Luis de Alba; *Hospital de la Risa*, about a hospital warden and his assistant; and *Cachun Cachun Ra Ra*, a farce based on *Happy Days*.

Also new at Univision is *Residencias 33*, a half-hour sitcom which started on Oct. 3 at 3 p.m. The serial comedy is set in a condominium occupied by celebrities.

Upcoming on the Telemundo menu is a large plate of first-run Mexican movies. The movies, which are the result of a long-term agreement made between Telemundo and Million-Dollar Video, which owns the Million-Dollar theaters in Miami and has other exhibition facilities in the U.S., will air beginning in December in the 9-11 p.m. slot from Mondays through Thursdays.

What makes the deal so significant, says Raider, is that movies which scored well in the box-office

will be available to TV viewers. Titles available for the Telemundo showings, to be called *Cine Millonario*, total 500. The initial group chosen includes 147 titles, says Raider.

Meanwhile, news continues to be an ongoing story at both networks. Telemundo, back in April, tied into the CNN service and now runs a half-hour of news, *Noticiero, Telemundo-CNN*, for Telemundo's affiliates from 6:30-7 p.m., following a half-hour of local news from stations. The network had been airing news via the Hispanic American Broadcasting Corp., news service formed by Gustavo Godoy and other key newsmen who resigned from Univision (known as SIN at that time).

In hooking on to CNN, Raider feels the new tie gives Telemundo much greater coverage than it was getting as an HABC affiliate. "We are now able to utilize the electronic newsgathering service of CNN for worldwide coverage. What happened, too, is that the two HABC anchors both went with CNN."

Guillermo Martinez, vice president/news director at Univision, says his operation has 11 correspondents, plus a half-dozen stringers. "Also, we use all of the correspondents from all our affiliates in the U.S."

In the presidential and vice presidential debates, Univision was alone in the Hispanic coverage, says Martinez. Also, for election night, "We are starting with a five minute break-in at 7 p.m. And at 8 we will broadcast live, until we have a new president, from eight

Univision personality Humberto Luna



**Telemundo's
"Noticiero/CNN"**

different locations throughout the night. We will have New York, San Antonio, Miami, two locations in Los Angeles, Puerto Rico and both Dukakis and Bush headquarters."

"We started presidential coverage on Oct. 25, when we began traveling with all four candidates. And on Oct. 26, we started a series, *The Crucial States*, consisting of a daily report from each of the states."

As to its usual daily news broadcasts, at 6:30 and at 10 p.m., the programs now feature a weekly mini-documentary honoring an Hispanic of the week, and live coverage is being increased.

Children's programming

When it comes to children's programming, Univision continues to be practically the only Spanish-language game in town. The network at present offers a five-hour children's block on Saturdays beginning at 7 a.m., including two popular series shown on U.S. commercial stations. The shows, which were introduced on Oct. 8, are *Captain Power and the Soldiers of the Future*, syndicated by MTS Entertainment, and World Events *Voltron*. *Power* airs from 10:30-11 a.m. and *Voltron*, from 8:30-9.

Also new at Univision is another sci-fi animated series, *Ulysses 31*, which is carried from 7-7:30 a.m. on Saturdays. One of its Saturday morning occupants, *Pobrecito el Payaso*, was replaced on Oct. 15 by a miniseries, *Inki—Cometa Radiante*.

Besides its weekly kids' block, Univision airs a children's strip, *El Tesoro del Saber*, from 7-7:30 a.m. But Univision is planning to ex-

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Whole new ballgame for Galavision

Galavision, the Spanish-language cable network which began life about seven years ago as a pay entity, looks forward to its new life as an all-news-and-information basic cable operation.

The new Galavision service premiered Sept. 1 over the network's 300 cable affiliates, reaching 1 million Hispanic homes. And, according to John Pero, director of advertising sales, the service, called ECO, has a full and complete 24-hours-per-day menu of programming featuring top Hispanic journalists who are specialists in specific fields.

ECO airs from Monday through Saturday. On Sundays, notes Pero, the schedule consists of movies and sports. In sports, Galavision carries Mexican and Spanish soccer, boxing and wrestling from Mexico. Gone are such fare as novelas, musicals and variety shows, which were on the network when it was a pay-TV service.

Pero admits that ECO is hard to sell. "It's a new concept in the Spanish market, and there are two over-the-air Spanish networks, so it makes it more difficult for us to sell. That's especially true for this time of year, when budgets are winding down in the Spanish market. Agencies are preparing for 1989.

"However, my experience over the past few weeks of going around the country is that the reception has been favorable for our service and to the idea. We are very close to getting three or four big accounts in the next few months." At this point, ECO has the Mexican Tourist Office and Miller Brewing, plus several retail accounts.

The right sources. As to ECO programming, which originates in Mexico, Pero notes that the anchors are known in the U.S. Also, he continues, "We have bureaus all over the world, and we are taking from sources in Mexico that have had tremendous success with news in the past, so there is no reason why ECO won't be successful today."

The big problem, he says, is increasing the subscriber list, "and showing that we have a first-class product. If you look at it, you would think it's CNN, but in Spanish. It's a shame that New York City is not wired and we aren't on any system in the Manhattan area."

Pero says that, while the service originates in Mexico, it receives a great deal of information from the U.S., and events are filmed in the U.S. as well. "As we get on with the program, we'll do more U.S.-oriented segments."

A typical programming day starts at 6 a.m. and winds up at midnight, at which time the news is repeated. Each segment is redone fresh every hour, includes sports, news, entertainment, weather and interviews. One recent broadcast, Pero says, was with an Argentine painter, interviewed by Jacobo Zabudovsky, former anchor on Univision's *24 Hours*.

Univision's
"Desde Hollywood"



pand its daily kids' schedule via a one-hour block, to start next year, according to Pero. Just what time period the shows will take are undetermined at this point, and Peru was unwilling to furnish details on the programs. However, she says the hour block will be produced in the U.S.

However, Telemundo is looking to compete in the children's programming arena, although it's Raider's feeling that the kid audience is not very large at this point. On Oct. 16, it introduced a 7-8 p.m. block via two half-hour shows. One is described by Raider as a *Double-Dare* type, and the other is based

on *Juvenile Jury*.

Being developed is a kids' show that will mix English and Spanish, which will be live-action and be introduced sometime in January. Raider gave no specifics on the show's format for competitive reasons. Also, according to Raider, kids' programs are being tested on the Miami and Los Angeles stations. The shows represent some Televisa programming of comedy strips that come out of Mexico and some dubbed product.

Raider says that animation is very expensive and will not yet pay off in kid audiences or in advertising. "In Spanish-language TV, it's been difficult to attract advertisers of kids' products," he says. But, he adds, Telemundo has attracted its first toy tie, Fisher-Price Toys.

He says, however, the toy manufacturer is not "going after the children. They were trying to get the mothers, who buy the toys. The target are 18-35, women."

In Puerto Rico, Raider says, the situation is different. "We will have a great fourth quarter because of the Christmas buys by Mattel and Fisher-Price and others which advertise on WKAQ-TV. "But in the continental U.S., there hasn't been that much excitement yet for us to create children's blocks that will attract that advertiser."

What Raider explains that Telemundo will do is get programming that will attract children and then "go on to see if we can get the advertisers. If the testing we are doing in the two markets is successful, we will have some network children's programming." □

Jorge Elias on Univision's
"Hablemos de Cine"



Stations say, 'Viva diversity,'
as advertisers go target marketing

Hispanic formats go forth and multiply in '80s radio land

By JAMES P. FORKAN

It's not just Hispanic radio any more.

Today radio programming for Latino listeners has in some ways become nearly as diversified as in the Anglo market. Stations are narrowcasting their programming, especially music, to very specific demographic segments of the Spanish audience.

And the advertising community, already attuned to the target marketing strategy in the general marketplace, seems to be buying the concept.

Not everyone, however, agrees that Hispanic radio formats are becoming more segmented. Nor does everyone agree that national advertisers are applying targeted marketing to Spanish-language radio. In some cases, a lack of ratings data makes stations' sales efforts an uphill battle. But that can be true even when ratings are available that show which Latino outlets are held in highest regard by their audiences.

"Stratifying by age and sex—that's something that's happening

all over the country," says Herb Levin, senior vice president at WADO(AM) New York. Such segmentation is "a natural evolution" and "very healthy," in his view.

There is fragmentation "but not to the extent of Anglo radio," says David Lykes, Dallas-based senior vice president of Tichenor Spanish Radio. "But we're getting there.

Advertisers always like alternatives they didn't have before."

Raul Alarcon, Jr., president, Spanish Broadcasting System, Los Angeles, also feels that Hispanic radio is "not at that level [of fragmentation] yet" but he too feels "We're getting there. There already is a certain specialization."

Deborah Folga, general manager at WTAQ La Grange, Ill., stresses that even among Spanish listeners, not everyone likes the same kinds of Latino music any more than, say, all Anglo women 18 to 34 listen to the same format in Chicago's general radio spectrum. "Everyone has different tastes."

"Our biggest strength is in women," particularly 25-plus, says Sam Murray, vice president and station manager at Tichenor's KCOR(AM) San Antonio. The station's top 40 format offers "total

WJIT New York distributes toys to children in a park.



KCOR San Antonio "Dia de la Raza" celebration features Arlette Pacheco from Mexico City.





Raul Alarcon, Jr.

variety," he notes: an hourly mix of modern contemporary and ranche-ro.

Generally in the southwestern markets, the emphasis is on Tex-Mex, Chicano, ranche-ro and other Mexican-American sounds, for example, at KGBT(AM) and KIWW(FM) Harlingen, Tex.; KVVA(FM) and KPHX(AM) Phoenix; KDCE Albuquerque, N.M.; KXEW Tucson; and KRMX Pueblo, Colo.

But those regions also are served

by KELP El Paso, with its "Chris-tian Spanish" music for all age groups; KVOZ Laredo, Tex., with a mix of hits since the '50s and La-tino MOR; and KTLN Albuquer-que, whose blend includes ranche-ro, salsa, bolero and new disco.

Contemporary Spanish is domi-nant at stations ranging from WOJO(FM) Chicago and KBRG(FM) San Francisco-Oak-land to KQVO(FM) Calexico, Calif.; KEAP(AM) and KGST(AM) Fresno; and KCVR(AM) Lodi, Calif.

Age targets also vary widely. Though most are pursuing the 18 to 49 demographic, KIBL(AM) Bee-ville, Texas wants those aged 25 to 65, while KIDI(FM) Albuquerque wants those 15 to 54; XLTN(FM) San Diego, 25 to 54; KALI(AM) San Gabriel, Calif., 35 to 54; KLOQ(AM) Merced, Calif., 18 to 60; KRMX(AM) Pueblo, 20 to 60; KBNO(AM) Denver, 18 to 39; and KQVO(FM) Calexico, women 25 to 49.

A mixed bag

Within the Tichenor group alone, KBNA(AM, FM) El Paso of-fers adult contemporary for Mexi-can-American baby boomers, while its KCOR San Antonio broadcasts mariachi, ballads and top 40; KLAT Houston airs ranche-ro, nor-teno and ballads; and KGBT Mc-Allen-Brownsville, Texas, blends contemporary, MOR and top 40. The diversity seems to be paying



John Lohmann

off, with TSR's Lykes boasting that all its stations lead in their respec-tive markets' ratings.

Sometimes stations seek differ-ent demographics during different parts of the day or night. WJIT New York is heavily talk-oriented until 2 p.m., with shows like *Cafe con Leche* and *What Dr. Ruth Didn't Tell You with Dr. Jose*, af-ter which it switches to music. Starting with "contemporary, salsa and Caribbean," WJIT at night switches again, this time to dance

Herbert Levin



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music appealing to Puerto Ricans and Dominicans.

WTAQ's Folga says her station is geared for adults 18 to 49 but some programs are tailored for the young, such as "a teen hour" of modern Latino hits and a Saturday morning show, including nursery rhymes, for children. Kid-oriented promotions include a Halloween show at a local theater, with 3,000 tickets given away via a McDonald's tie-in, and a yule event at which Santa Claus hosts a party for 600 kids.

Despite all that, Jimmy Jimenez, general manager at WKDM(AM) New York—which zeroes in on 25 to 44 listeners (mainly women) with contemporary hits—maintains that Spanish radio is "not becoming fragmented. There's no such thing as Spanish radio, the same as there's no such thing as English radio. There is Spanish contemporary, CHR, urban, country and news/information formats, the same as in Anglo radio."

The format differences are largely regional, according to John Lohmann, general manager at WLVA(FM) Hartford, Conn. "If you go through the U.S. listening to Hispanic stations and you find a heavy concentration of Mexicans, you'll find two formats: *ranchero* (our equivalent of country and western) and then one with international music, from South Ameri-

Audience measurement progress being made in both radio and TV

There's *mucho* activity in Hispanic audience measurement currently, and that covers both TV and radio. It appears that the people meter will make its debut for Hispanic TV ratings and, on the radio side, Birch is becoming a major factor in Hispanic measurement by upgrading its service to meet most of the recommendations of the erstwhile Spanish Radio Advisory Council.

The TV development involves an ambitious effort by the two major Spanish networks—run by Univision Holdings and the Telemundo Group—to set up a national rating service employing a people meter panel of 800 to 1,100 households. An expensive venture for the Hispanic market, the rating service could cost—over the life of a five-to-seven-year contract—somewhere in the neighborhood of \$25 million, according to one estimate. (See also *Final Edition*, October 31 issue.)

Superintending the project is a Spanish Television Research Committee with members from both network companies and from Norman Hecht Research Inc., with the head of the latter acting as chairman. Norman Hecht is a veteran researcher who once worked for Arbitron and was a consultant to AGB Television Research when that British-based company was testing its people meter service. He has an exclusive research consultancy arrangement in the Hispanic field with Univision but has a dispensation to act as chairman of the STVRC.

Studying proposals. The research group is now examining proposals from Nielsen and Arbitron to conduct a Hispanic people meter service. AGB had also been in contention for the project before it folded.

A decision on which of the two services will get the nod is expected sometime during the middle of this month. But a pilot test in Los Angeles would precede the launching of a full-scale service. However, if a full-scale service succeeds, there may be efforts to extend people meter measurement to some of the bigger local markets, such as Los Angeles, New York and Miami.

In radio, Birch Scarborough Research has benefited from the recommendation of the now-dissolved SRAC that the telephone is the device of preference for audience measurement, in particular compared with the door-to-door personal interview method. While broadcasters generally prefer the door-to-door method, which generates higher listening numbers than the telephone, strong advertiser/agency pressure in the SRAC brought about the phone recommendation. The most widely used service in Hispanic radio measurement has been Arbitron with its diary, mainly due to that rating service's dominance in radio. However, there is no strong support for the diary methodology.

Sample size. Birch has taken a number of steps to conform with the recommendations of the SRAC, the most pronounced being an increase in sample size. This is part of an overall Birch sample size increase starting this fall, which will, among other changes, double the overall weekend sample in markets below the top 10.

Sample sizes in the top 16 Hispanic markets are being increased to SRAC minimum levels, with full effect in the September-February Hispanic reports. One effect of this is to permit the release of Birch's Hispanic Target Market Reports (HTMRs) on a quarterly basis.

These quarterly figures, however, will utilize a six-month rolling tabulation base. HTMR reports have been coming out for about a year, covering 19 markets starting with the March-August '87 period. Thomas Birch, chairman/CEO of the research firm, reports that, while no stations have subscribed to the HTMRs, he is confident that the situation will turn around with the changes in Hispanic measurement.

However, a number of agencies and advertisers are now using Birch for buying Spanish radio.—**Al Jaffe**



Maura Donohue

ca, Mexico, the Caribbean and Spain. In Miami, they're into news and the flavor is Cuban."

But Lohmann says, "I don't see us getting into CHR, MOR, 'Music of Your Life' and things like that, as much as Anglo radio."

Awaiting new FM

The introduction of SBS' new FM station could fragment the New York Spanish radio market still more, some fear, though most seem unconcerned.

"I don't anticipate the new FM will be a major problem," says WJIT's Joanna Ghiggeri, general sales manager. "There's not the same bias for FM as in the Anglo market." In any case, Latino FMs elsewhere are not always ratings leaders, she notes, adding that many AMs often beat them. "[SBS] could end up fragmenting its own [AM] audience," she adds.

SBS' Alarcon said near presstime that by now WUKQ(AM), its temporary AM New York station, should be sold to Forward Communications at the same time as Forward's WEVD(FM) is sold to SBS and is rechristened WSKQ-FM.

Thus, SBS will be able to sell WSKQ as an AM/FM combination, he says. The AM will become more news, talk and "traditional music," and its audience will skew "slightly older," while the new FM offers international adult contemporary music for a "slightly younger" audience, mainly 18 to 49.

Spanish Broadcasting System al-
(Continued on page 40)

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Hispanic glue: radio merchandising

By **JESSE G. WILSON**
and **ELAINE HARTONG**

Executive vice president and account supervisor, respectively, of San Jose & Associates, Chicago advertising agency

Over the past several years, an increasing number of advertisers have been using regional or micromarketing strategies to bolster sales in opportunity markets where their brand development indexes are less than the national average. As part of this micromarketing approach, savvy advertisers are including Hispanic marketing programs in areas of high Hispanic population. Chicago, Miami, Houston, Dallas, New York, and Los Angeles are all examples of markets where the Hispanic population's purchasing power can influence a brand's overall market performance.

More often than not, these regional strategies—either Hispanic or non-Hispanic—are based on price discounts aimed at consumers; direct mail coupons, prepacks, instant redeemable coupons and deals to the trade are often included. However, a handful of general market companies and an even fewer number of Hispanic ones have developed and executed "value added" programs which integrate promotional media activity with consumer product promotions.

These media-driven, "value added" services have traditionally in-

cluded the orchestration of many consumer promotions such as on-air contests, live remote broadcasts, giveaways, special community event appearances and sponsorships. With regard to community involvement, Spanish-language radio stations have always been more involved with this type of activity as a natural programming integration of the Hispanic culture. Association with these events of high cultural significance evokes positive consumer response for the advertiser.

More recently, aggressive Spanish-language radio stations have been focusing on retail merchandising as a "value added" service, thereby integrating benefits to the advertiser, the trade, the consumer and the stations themselves simultaneously. This transition is occurring because of the advertiser's needs, rather than from radio station positioning in the market.

Advertisers know that gaining retail display space has a direct correlation to sales increases. While the consumer is still "king", the retailer/trade has become a very powerful force to reckon with in the marketing chain, as trade support or lack of it can make or break a brand before it even reaches the consumer.

Therefore, the advertiser who places merchandising dollars, in addition to regular media dollars, with a radio station offering this "value added" service of retail mer-

chandising can help leverage the trade in its favor.

In cities of high Hispanic concentration, for example, the majority of local chains and independent retailers are actively seeking stronger Hispanic programs to help solidify their relationships with this consumer segment. Chain retailers already regularly buy product on deal and look for strong advertising schedules to back up product movement. Therefore, any "extras" specifically directed at the Spanish-speaking consumers can encourage endorsement of a product through display activity.

30:30 programs

One very potent combination offered by Spanish-language radio is a 30:30 retail merchandising program coupled with a consumer promotional activity such as an in-store product demonstration and/or sampling program. The 30:30 program allows the retailer subsidized promotional airtime in conjunction with the individual advertiser's on-air product promotion, tying the two together. Offering the subsidized airtime, in addition to product demonstration activity, encourages chain and independent retailers to buy incremental cases to build displays in anticipation of increased traffic in their stores.

Generally, the independent retailers have been easier to work with in setting up merchandising, as they are smaller and therefore, more flexible. With the Hispanic market being an urban-concentrated population, with 85% living in cities, the independent inner-city retailer is an important element in enjoying Hispanic sales growth. As an example, in a recent rollout in Miami for a household product, 5,000 cases were sold in for display through 50 independents, while negotiation for displays with major chains was not possible.

These combinations of consumer promotions and trade merchandising programs have led to a "win-win" situation for all involved. The Spanish-language radio stations

Future floor polish demonstration and couponing as part of a 30:30 radio program in New York.



offering trade/consumer promotions have more ability to bring in incremental advertising dollars which may not have been originally designated for media investment.

For example, Hispanic community event promotional dollars may be reallocated to a specific station that offers a better total media and event promotional package—thus providing not only the media reach and frequency around a special community event, but also the direct impressions made at the event site itself. Spanish-language media advertising dollars which may have been spread across a number of stations within a market may thus be consolidated into the one offering the best merchandising program.

The retail trade benefits from these programs by receiving a subsidized airtime schedule which, in conjunction with a regular media schedule for a product, encourages increased store traffic and sales. And of most importance, the advertiser benefits from consumer promotions and most directly from retail merchandising featuring display-building and, therefore, in-

creased product sales.

An interesting consideration regarding all this is that consumer/trade merchandising promotions *should* be easier to develop with Spanish-language radio than with general market stations. In the general market, radio listenership segments are fragmented by social, economic, demographic/lifestyle and other variables, with programming targeted to specialized audiences. Meanwhile, the Spanish-language radio stations within any given market are fewer, and therefore, concentrate the bulk of radio listenership among a handful of stations in each market. Furthermore, the stations' programming is generally targeted to the 18-34 age bracket, the largest in terms of U.S. Hispanics.

No instant success

However, Hispanic market broadcast consumer promotions and retail merchandising are not a yellow brick road to instant success. The difficulty within the Spanish-language broadcast indus-

try at present is the shortage of station personnel who have an understanding not only of effective Hispanic market consumer promotions, but who are experienced in retail merchandising *and* who also have the retail contacts to implement these programs effectively.

The best results have in fact been produced by a select number of Spanish-language, full-service advertising agencies who, first of all, have worked closely with the advertisers and therefore have an understanding of the advertisers' overall marketing and advertising objectives. Secondly, their overall marketing expertise—which includes a thorough understanding of both retailer operations and Spanish-language radio offerings as they relate to client objectives—is an invaluable asset in creating effective programs. Such agencies are in the position to select and orchestrate creatively the promotional and merchandising programs via the broadcast media, ensuring the most effective results for their clients. □

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Hispanic formats

(from page 37)

ready sells AM/FM combos to advertisers in Los Angeles and Miami. Moreover, Alarcon discloses, SBS is pursuing "one or two" other station acquisitions in undisclosed markets.

The new FM's entry into New York is "long overdue," says WADO's Levin. "It's the last major market to have one." WSKQ-FM's presence, he feels, should prove "great for the market" because the improved sound "should bring in new listeners and make the aggregate [Hispanic] share go up."

TSR's WIND(AM) and WOJO(FM) in Chicago target "different and distinct groups," says Maura Donohue, the FM outlet's general sales manager. The FM is "younger and offers a lot of music, music from all over, and less talk. The AM is [geared] entirely for the Mexican market, with rancho and traditional, but no old, music."

In response to such specific formatting, she says, business has been "very good" at both stations.

Bullish sales outlook

As Spanish stations are "getting more fragmented like Anglo radio," says KCOR's Murray, "They're bringing in more advertisers." He describes the Hispanic radio outlook as "very positive." WADO's Levin agrees that, whether it's due to format-targeting or not, "There's a strong move into Hispanic radio, period. We're now able to fit our

Sam Murray



Latino stations radio-active with good deeds, links to communities

Hispanic radio stations' community ties range from helping neighbors in need with food drives to entertaining their listeners with free concerts.

Since 1960 WJIT New York has been involved in everything from neighborhood cleanup campaigns to Thanksgiving food drives to walkathons for crippled Puerto Rican children, says Joanna Ghiggeri, general sales manager.

WKDM New York gives away Thanksgiving turkeys for the needy and elderly as well as Christmas toys for poor youngsters, says Jimmy Jimenez, general manager.

At WADO New York Herb Levin, senior vice president, says its efforts have included food drives and collecting clothing and toys for the poor, whether in New York or in Latin America.

WTAQ La Grange, Ill., has been sponsoring an annual health fair for three years in conjunction with local hospitals and clinics. This year 7,000 people took advantage of the free eye and foot exams, inoculations and the like, says Deborah Folga, general manager.

At WOJO(FM) Chicago events have ranged from food drives and parades to supporting several community festivals. WIND(AM), meanwhile, backs more traditional Mexican-appeal events like Cinco de Mayo festivals.

WMDO(AM) Washington promoted the March of Dimes' Walk-America '88 walkathon, a fund raiser for the National Capital Area Chapter of the March of Dimes Birth Defects Foundation.

Tichenor Spanish Radio's David Lykes, senior vice president, says its stations in Texas collected do-

nations for Hurricane Gilbert victims that totaled 180,000 pounds of food, household products and medical supplies. TSR also has given Hispanics \$200,000 in college scholarships to date, he notes.

KGST Fresno helps raise funds for United Cerebral Palsy and the National Hispanic Scholarship Fund, says Dan Crotty, general manager.

On a lighter note, TSR's KCOR San Antonio has enjoyed enormous success with several special events, from Mother's Day and Cinco de Mayo to the Hispanic State Fair in July and Fiestas Patrias in mid-September.

Blue-chip backers. Miller Brewing Co., Pepsi-Cola Co. and Colgate-Palmolive sponsor all those events, and Miller and Pepsi already have renewed as the top two backers of the 1989 Hispanic State Fair, discloses Sam Murray, KCOR station manager.

The fair, staged at La Villita, a three square block historic preservation near the Alamo, had 12 exhibitors last summer, including Lincoln-Mercury and McDonald's, which featured Ronald McDonald in its "McDonaldland Kids Area."

Raul Alarcon, Jr., Spanish Broadcasting System president, backed a special event Sept. 16 at Belvedere Park in Los Angeles that drew more than 100,000 attendees and a health fair that attracted 60,000.

Alarcon has just formed SBS Promotions to organize fairs, outdoor concerts and other special events. "I like to diversify into related businesses and not put all our eggs into one radio basket."

station to certain demographic targets," he observes. "That's long existed in Anglo radio. Sophisticated agencies deal with that all the time."

Levin adds that he's never felt as confident about Latino radio's sales prospects. "There's a realization coming to corporate America. The Hispanic segment is large and growing, but also will stay culturally separate—though not everyone

embraces that."

For years, Levin recalls, Procter & Gamble "wouldn't even let us in the door. Now it's my biggest customer."

Among other accounts cited by Hispanic Marketing Research & Communications, San Antonio, as having successfully used Spanish radio, are McDonald's, Coca-Cola Co., Miller Brewing Co. and Anheuser-Busch. "Radio," the re-



David Lykes

searcher adds, "is clearly the most effective media tool when targeting the Hispanic population because... it is a companion of the heart, a close, personal friend."

Ad sales in New York Hispanic radio alone should climb from \$18 million in 1987 to almost \$20 million next year, predicts WKDM's Jimenez. Without offering specifics, TSR's Lykes agrees that the sales outlook is "excellent. The future is bright. Some [marketers] have their toe in. Now we have to get the whole leg in!"

"Increased sophistication is being brought to this marketplace," Lykes continues. "Historically, it was a concept sell and to a degree it still is... With research it's now documentable upfront. Now [advertising] people say, 'I can back up this decision. I have justification.' So research is the silver bullet."

Although the Spanish market is in effect "a market within a market," WJIT's Ghiggeri contends, "We still get only token budgets" in Spanish radio. Research is part of the problem, since this market is admittedly "difficult to measure."

Although "I'm certainly not a

Joanna Ghiggeri



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WADO New York sends van with personalities to boost store traffic.

proponent of any ratings service," Ghiggeri says a lot of agencies, from BBDO to Conill Advertising, are using the telephone-based Birch radio ratings. Arbitron's diary-based data, on the other hand, "doesn't work in the Hispanic market," she believes. "Hispanics don't fill out diaries." As for Strategy Research, WJIT bought its ratings at the outset but "they did a lousy sales job on it" and agencies didn't use the data, she adds.

Although WTAQ's sales are "excellent" in the Chicago market, Folga complains, "There's a serious lack of knowledge about the Chicago Hispanic market from the out-

side. Chicago is a microcosm of the Hispanic population of the U.S." That, she claims, "makes it an excellent test market." Yet most advertisers seem to prefer California and Texas, she adds.

The ratings are not helping matters, she adds. "I don't think the ratings are reflecting a lot of what's going on in Chicago. Arbitron is not reaching the true Hispanic community" with its sample. WTAQ's telephone responses to contests and promotions demonstrate far stronger loyalty than the ratings indicate, she says. The station's "Fiesta Club" for instance, has 30,000 members, with 2,000 more

waiting for cards. These card-carrying "members" can use the cards to win prizes and get discounts on purchases in participating stores.

Dan Crotty, general manager at KGST Fresno says his station does not subscribe to the rating services, though "I'm told we're doing well with 25 to 54, our main target," and also with 18 to 34. "It's so hard to get acceptable numbers in the Spanish market," he notes, adding that response to special events and promotions can be a "better barometer." KGST backs Mother's Day, Father's Day, Cinco de Mayo and other events each year.

At the 50,000-watt WL VH, Lohmann says he does not sell by the ratings numbers. Rather, he uses "conceptual selling," calling attention to its having "the most powerful signal in southern New England, including Anglo stations."

The exec adds with a laugh, "People think there are no Hispanics here [in the Hartford area]."

Ramsey Elliot, vice president and general manager, KRCX(AM) Sacramento, agrees with the ratings critics. "I look at a rating book and it's meaningless. I look at our results and they're excellent," referring to ad sales. The outlook is bright since the Hispanic population is "in a growth cycle, with California numero uno," he notes. □

Manning March of Dimes WalkAmerica checkpoint: WMDO Washington execs, l. to r., Allan Klammer, Tony Aguilar, Samuel Galvez.



Some new entries in radio syndication

On the radio syndication front, UPI Radio Noticias, Texas State Network's Spanish Information Service and Cadena Radio Centro are about to get some new competition in the Spanish language radio news business. In January, Lotus Satellite Network and Gannett plan to launch its USA Today Spanish News Service.

Rick Kraushaar, president, Lotus Hispanic Reps, says the service will kick off with five 5-minute newscasts daily, on the hour, via satellite. "And from five a day, we'll work our way up to 10 or 12 newscasts a day with a target of the top 30 Hispanic population markets." He says the service will originate out of Gannett's news center in Washington and that the stories will be edited for Hispanics living in the USA. And it will have the prestige and stability of Gannett behind it.

This, says Kraushaar, "will enable us to compete for new network radio dollars we haven't been able to approach until now."

Sports and music

Down the road, Kraushaar says, Lotus is also looking at the possibility of moving into more national sports networking, including coverage of major fights, and is considering satellite delivery of musical programming to the stations it represents.

Meanwhile, Texas State Network's Spanish Information Service has just signed Raul Alarcon's three AMs, WSKQ New York, KSKQ Los Angeles, and WCMQ Miami as new affiliates effective Jan. 1. That will give SIS 41 affiliates in eight states, including 18 in the top 20 U.S. Hispanic markets.

Scott Savage, TSN vice president, general manager, also reports SIS recently adding a station in San Diego, a stronger affiliate in San Antonio, and says SIS is in negotiation for a stronger affiliate in Houston.

SIS feeds five minute newscasts on the hour, Monday through Friday, from 6 a.m. to 9 p.m., plus sports three times a day. The week-

end schedule is newscasts on the hour from noon to 7 p.m.

Savage reports this year's ad sales 25% ahead of '87, year to date. He says the gain is a combination of a rate increase based on having more affiliates, "plus the bigger audience that comes with more affiliates making us more attractive to more advertisers." Most of the advertisers are package goods brands, plus some automotive, some political, some telephone services and some beers.

UPI Radio Noticias reports ad business up 40% this year. Robert Gutierrez, president of Production 19, Ltd., which reps the news network, attributes the jump to "demand by more advertisers as we expand from our previous Monday through Friday schedule to add Saturday newscasts."

New advertisers include McDonald's, J. C. Penney, Lincoln-Mercury and Toyota. Gutierrez says the satellite-connected network now has 39 affiliates in "every major Hispanic population center in 14 states. We're now on KALI in Los Angeles and we've added affiliates in Boston and in Lompoc, Calif. And we are now on two Miami stations, one AM and one FM." He also reports upgrading by moving to stronger affiliates in San Antonio; Austin, Texas; and Bakersfield, Calif.

Cadena Radio Centro is a fast-growing satellite-connected 24 hour music, news and feature network "recognized by Arbitron for

the first time in its summer book as a national radio network, right in there with ABC and Westwood One's networks," says Cadena president Carlos Aguirre.

He explains that, though Cadena started up in the U.S. in 1986, it took time to line up the first of its current 26 affiliates in 23 markets (three are AM-FM combos) and install their satellite receiving dishes. But now, says Aguirre, Cadena's affiliates cover 74.3% of U.S. Hispanic households. That, he adds is 10,330,900 Spanish speaking persons, 12-plus—"double the coverage we enjoyed only one year ago."

Cadena retains commercial availabilities in newscasts that kick off each hour, and in sportscasts, long-form concerts and in the three-minute feature, *Fuente a Fuente*, or *Face to Face and Take off Your Mask*.

Local spots only

Aguirre describes this as two celebrities facing each other in confrontational three-minute interviews with a commercial in the middle: "Celebrity No. 1 asks the second a gossipy, personal question, which the second answers. Then the commercial comes on. After the commercial, No. 2 asks and the first celebrity replies. Most of the celebrities are well known musical artists, but some are athletes and some are stars from the novelas."

He says Cadena's newscasts are

"Adelante" host Henry Cisneros, c., flanked by Starstream's promotion manager Pedro Megarejo, L, and its pres. Gary R. Firth



In the Picture

Joanne Burke



New corporate director of media research at Foote, Cone & Belding Communications discusses the evolution of media measurement and some of the experimental devices currently on the drawing board. She also points to new advertising opportunities overseas as more channels open up in more countries.

FCB media researcher provides agency resource that can stretch ad budgets

Joanne Burke, who's taken over from veteran Hugh Zielske, now semi-retired as vice president, corporate director of media research at Foote, Cone & Belding Communications, sees media research as "a discipline that's grown in importance."

The reason, she says, is that "Some of the biggest changes in this business have been in how media audiences are measured as we've moved over the years from diaries to set meters to people meters. And we're still trying to invent a practical passive meter."

Burke says prototype passive meters currently being tested include devices that can sense differences in body heat generated as a household member enters a room where a set is on and detects movement in and out of the room. She adds, "Passive devices are a long way from being perfected, but they're one of the highest priorities on the industry's research agenda."

Another change she points to is development of single source methodologies "to address the issue of media accountability: Can we use single source techniques to get closer to accurately measuring the effect of advertising on product sales?"

Burke explains that so far single source applies only to television but that work is being done on passive measurement for print. On the drawing board, she says, are devices designed to read the UPC codes on magazines "and even one hoping to use small computer chips inside magazines. These are supposed to emit signals to a signal collector, either in the room or possibly installed in a wristwatch-like device worn by the reader."

Down the road?

She says one problem will be how to edit out what registers when someone wearing such a device walks by a newsstand. The ideal, she adds, "would be a gadget that could also record emissions from the frequencies TV and radio sets are tuned to, as well as the computer chips embedded in magazine pages. But all this is probably a long way off."

Burke works with such industry groups as COLTAM—Committee on Local Television Audience Measurement. COLTAM is still working to improve such low-tech and no-tech devices as the common viewer diary. She observes that both Arbitron and Nielsen are working with COLTAM to design a personal viewing diary, as opposed to the present household diary, which is expected to be easier for viewers to fill out, in the interests of pushing response rates up.

Burke expects to be part of the agency's new business presentations and calls media research "one of our key resources." She says a strong media research presence "adds to an agency's full service credentials. Our expertise enables the agency to carry out certain kinds of proprietary work so we can go into a new business presentation and show a prospective client 'Here are the kinds of things media research can do for you to make your dollars go farther.'"

International opportunities

Burke says that at FCB she'll be moving into international advertising for the first time: "With government deregulation of television spreading to more countries, more channels are opening up and more satellite-carried program services are being made available to viewers all over the world. In working with program suppliers and broadcasters overseas, agencies will even be working with some companies controlled by people like Rupert Murdoch, who own broadcast and print media in this country as well as in countries overseas."

She explains that one of her projects in the international arena will be to cross-reference how media are measured and reported in different countries: "Our planning system is based in part on case histories. We can learn from successful experiences both here and overseas and see what steps that worked well in one place can be adapted and applied to other markets in other countries. We can learn from what's been done in other countries, just as they can learn from us. I expect to be doing my share of traveling to facilitate this learning process."

Burke comes to FCB from N W Ayer. There, as media research director for the New York office, she used to "put in quite a bit of time checking out data in the reports the broadcast and print sales people would bring in to our buyers and planners. Then I'd pass back the word on how reliable I thought it was."

But she doesn't expect to be doing too much of that in her new job: "Here, instead of trying to figure out whether a particular numerical claim seems to make sense, I'll be more involved in broader policy questions: Does this or that methodology make sense? What should our agency point of view be on issues like commercial wearout?"

On questions like these, she explains, "I'll review the existing literature on the subject and write up a report saying 'Here's what's been done before in investigating commercial wear-out. This source thinks A. That source believes B. Now here's the way I believe makes the most sense, and here's why.' I'd either select and recommend one of the alternatives, based on existing literature, or possibly recommend a blend of the best of a couple of the existing ideas."

Legislation aims to stiffen equal employment requirements

The staffs of Reps. Mickey Leland (D-Tex.) and Cardiss Collins (D-Ill.) expect to have ready for them soon proposed legislation to require broadcasters and cable operators to provide jobs to women and minorities equal to their ratio of the local work force.

Currently, FCC rules require only 50% of parity, below which the station is automatically looked at to see if it has been making its "best effort" to recruit women and minorities.

The Leland/Collins bill, according to Patrice Johnson, Leland's

chief of staff, also would shift around some of the job category names that some blacks suspect are being used to hide widespread failure to move minorities into significant positions at stations.

Supporting their claims somewhat was the FCC report on equal employment opportunity trends in the industries. The report paints a favorable picture of across-the-board improvement, but a close study of the changes within categories offers confusion.

For example, while changes in

the marketplace

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most categories between 1987 and 1988 amounted to only a percentage point or less, the report shows a dramatic 21% jump in the number of female employees in "service" jobs in the cable industry.

In 1987, there were only 235 such jobs available throughout the U.S., and women held 27.1% of them, males 72.8 percent, minorities 28.9 percent. In 1988, however, there were 342 jobs listed under that category.

Of those 342, 48%, were held by women, men now held only 52%,

and the minorities dropped to 21.1%. Hispanic females more than doubled their ratio, from 1.7% to 3.8%, while the number of black males in those jobs fell from 11.9 percent to 7.9 percent.

Johnson says there is a need to change the job category definitions to make them more reflective of today's broadcasting and cable companies.

The most controversial thrust of the Leland/Collins bill, however, will be a requirement that cable television systems, broadcasters,

networks and others would have to be certified every year "at 100% of parity. If you fail more than once to qualify for certification during the appropriate review period, you are designated for investigation," Johnson says.

If the investigation happens to coincide with license renewal time, the renewal application would be suspended until the investigation is complete.

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Washington Report

Future reduction of station paperwork: It's a matter of form

When Ronald Reagan handed the keys to the Oval Office to George Bush, he also handed him a tough act to follow so far as broadcast deregulation is concerned.

Relaxation of ownership rules, a reduction of the burdens of comparative renewals, or abolition of the requirements of the fairness doctrine may all have won the plaudits of the industry, but nowhere is President Reagan's effort more apparent than in the sheer reduction of paperwork and other reporting requirements.

Actually, an emphasis on paperwork reduction was a legacy handed on to Reagan by his predecessor, but the greatest strides were made during the eight Reagan years. A recent report by the General Accounting Office to its parent, the U.S. Congress, provides a snapshot of some of the Reagan legacy to Bush by centering on the fate of five forms that used to be the bane of broadcasters and/or cable operators—301, 323, 324, 325, and 326.

Self-produced regulation

The report also tends to show how much regulation is self-produced: A rule in one area requires a report from the regulates so that a check can be made on compliance. Eliminate the rule and the need for the report also is eliminated.

For background, the report says, "In the past, FCC required reports of financial qualifications from broadcast license applicants so that it could evaluate the ability of applicants to build and operate a broadcast station.

"FCC also required annual financial reports and annual ownership reports from broadcasters. FCC used the annual financial reports for cases and decisions in which the financial condition of a broadcaster was at issue or economic injury had been claimed.

"FCC used the ownership reports, maintained as files on approximately 11,000 broadcast stations, to monitor compliance with its rules governing multiple ownership of broadcast stations. FCC also required limited general financial and ownership information from cable television operators."

With that stage set, the report goes on to outline the fate of Form 301, imposed on certain broadcast entities in 1965, at a time it was considered that precious spectrum space may go dark because some broadcasters were not financially able to last for more than a year.

The UHF medium provided the impetus for the rule. It required reports from those seeking UHF construction permits in communities where there already were at least three commercial stations operating, and by applicants for all other broadcast entities.

"This new standard emerged from an FCC opinion

expressed in the case of Ultravision Broadcasting Co. and Superior Broadcasting Corp.," the GAO report notes. "In the opinion, FCC stated that it wanted to stimulate the earliest possible development of the UHF medium, but acknowledged that this goal might be impaired if the financial failures of the early years of UHF broadcasting were repeated."

With that in mind, the FCC wanted applicants to project their estimated annual revenues over the next three years and provide "evidentiary proof" for those forecasts. Then it required a "realistic" estimate of construction costs and operating expenses so the agency could be certain the station could operate "in the public interest."

The agency still relies on Form 301 as the primary instrument to evaluate an applicant's ability to build and operate a broadcast facility, and it is a factor in the comparative renewal process.

Making it simpler

After Reagan came into office, however, the FCC decided to revise the form, voting in June 1981, to make it shorter, primarily by rephrasing questions so they could be answered by a "yes" or "no." As expected by some at the time, abuses occurred in the use of the shortened form, and the FCC instituted a system of random checks of financial qualifications of applicants.

A request by the Federal Communications Bar Association that the commission make substantial revisions in the form in order to help curb alleged abuses in the competitive renewal process is a major part of the commission's consideration of major changes in the process, expected to be dealt with at a meeting in late February.

The association asks that the information on the form be limited to estimated cost of construction, estimated cost of three months of operation and the source and amount of financing. Forms 324 and 326 died in 1982 to the cheers of broadcasters and cable operators. Form 324 required annual information on the revenues, expenses and property of broadcasters, and even required a balance sheet to accompany the report at one time. Similar information was required from cable operators on Form 326. Form 323 still lives, but has been altered because of other ownership changes made by the FCC.

The form lists the ownership of stations, including, as the GAO describes it, "the names of all officers and directors, with specific data on their stockholdings, citizenship, and dates of election, and names of all partners and stockholders," information on any other broadcast interests the licensee and its principal parties and their families might have, and requires an annual listing of all stock transactions for the property.

That left Form 325, the ownership information report for cable. It required information similar to that required of broadcasters but existed in many versions over the years as the cable industry underwent constant change. The commission proposed in 1985 to eliminate half the information required on the form but has not acted yet.—Howard Fields

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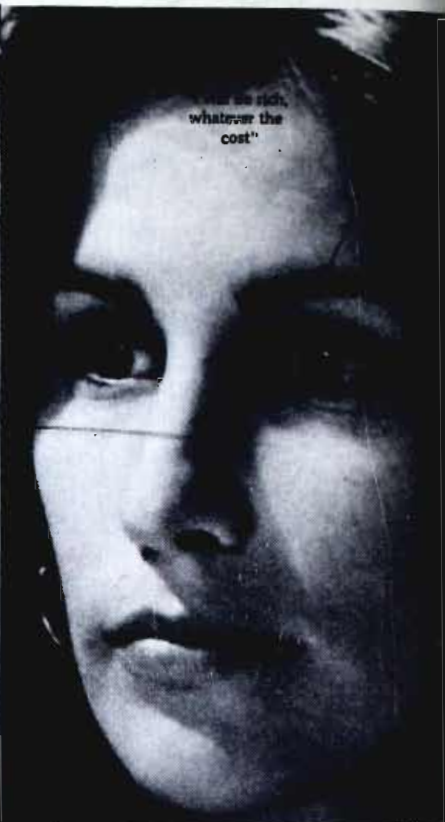
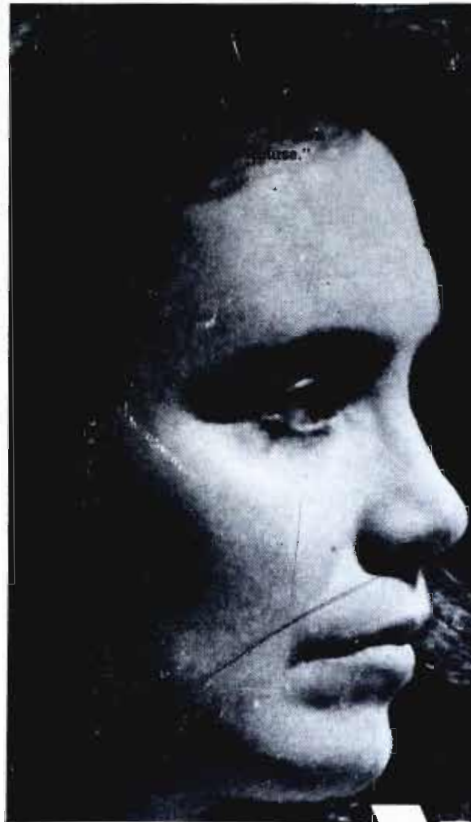
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Arthur Doty

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The rest of Cadena's transmission is music with no network commercials, but within which affiliates can sell their own local spots.

Aguirre says that since Cadena is "still in our startup growth stage, total revenue is still relatively small. But it's four times what it was last fall, only four months after we first started selling advertising in July 1987, and we had only half our current number of affiliates."

He says Cadena's advertisers include beers, shoes, telephone services, government—the armed services and the immigration service—fast food restaurants, softdrinks, pharmaceutical companies and, this year, political advertising.

New at Caballero Spanish Media is a contract with Jorge Camara, president of the Los Angeles Film Critics Association, to produce *Camara en Hollywood*. The daily five-

Jose Luis Madrigal, SIS newscaster



minute radio show is scheduled for a November start, featuring interviews with celebrities from the worlds of movies and music. It's designed to air twice a day, Monday through Friday.

Caballero president Eduardo Caballero says his company continues with its coventure with CBS to provide stations with Spanish language play-by-play of the World Series and All-Star Games—broadcasts, he adds, that enjoy "a good lineup of sponsors." He says Caballero is also planning some more sports shows and is preparing a new fashion program, *Moda a la Moda* (loosely, *Fashionable Fashions*), produced by Gladys Rodriguez-Dod.

And Starstream Communications has gone bilingual with both Spanish and English versions of its new *Adelante* (*Forward*). The Monday-through-Friday two-and-a-half minute program targeted to Hispanics bowed Oct. 31 in the top 30 Hispanic markets. Host of the program is San Antonio Mayor Henry Cisneros.

Broad subject matter

Starstream president Gary Firth says the program will explore such areas as Hispanic economic progress, Hispanic heritage and traditions, concerns about bilingual education, political issues, affirmative action programs, immigration and permanent residency, and include salutes to prominent Hispanics of the past and profiles of today's Hispanic achievers and celebrities.

Starstream is offering 30-second and full-minute availabilities within each program to national advertisers and is offering the program on a barter basis to participating radio stations.

In addition to its joint venture with Gannett for a new Spanish language news service, the Lotus Satellite Network currently transmits the 90-second *Su Cocina* (*Cooking Tips*), sponsored by a food product, in 15 markets.

With the playoffs and World Series, Lotus just wound down its Los Angeles Dodgers Spanish Radio Network for 1988 and, in California markets only, distributes a show on the California state lottery.

Meanwhile, Santa Fe based Hispanic Radio Network has extended its coverage to the top Hispanic markets including Los Angeles, New York and Miami. Altogether, the network's syndicated *El Dicho del Dia* (*Saying of the Day*) and *Buscando la Belleza* (*Search for Beauty and Health*) are heard on 60 radio stations.

National sales manager Jeff Kline reports *El Dicho* is sponsored on alternate days by the U.S. Army and that *Buscando*, hosted by Consuelo Luz, is sponsored by various Procter & Gamble brands and by Campbell Soup. And he stresses, "We do not compete against our affiliates for spot dollars. We insist our advertisers fund us separately from their spot buys."

Kline also reports that HRN this year became exclusive sales representative for the Spanish news and public affairs programs produced by Radio America in Washington, D.C. These include *Desde Washington*, *Enfoque en las Americas*, *Contrapunto*, *Reflexiones* and *Personajes*.

Besides being on the air, *El Jefe's Top Latin Hits Countdown* is also, literally, in the air. Art Doty, president of its distributor, Spanish International Marketing, says it's the first Latin music program accepted for Eastern Airlines' in-flight programming and that it reaches approximately 2 million passengers every two months.

Back on the ground, SIM barter the show to 34 stations and sells commercials on it to national advertisers. Doty says advertising increased 66% this year over 1987 and that the sponsors include AT&T, Cannon Films, Warner Brothers, McDonald's, Mundo Artístico, Ralphs, Vons, Reebok, Roman Meal Breads, Tylenol and Tune-Up Masters. □

Carlos Aguirre



New York production facility producing Hispanic syndie shows

Times Square Studios, the New York production facility, has become an independent producer of Hispanic programming with the launch of two new hour series—one a daily talk show, the other a weekly medical/health broadcast.

Marcelino Miyares, president of Times Square Studios, and who also will serve as executive producer of both shows, says the Spanish-language shows will be offered in syndication to U.S. Hispanic as well as English-language stations and will be satellite fed to Latin America and Spain.

"The ever increasing Spanish-speaking population, as well as Anglo advertisers, are requesting new American-produced Hispanic programming," says Miyares. He hopes to have both shows ready for delivery in January 1989.

Produce only. While Times Square Studios will produce the shows, it will not distribute, says Miyares. He's in negotiations with U.S. distributors now.

If the series fly, Miyares hopes to produce 39 weeks of the yet-to-be-named talk-show strip and 52

weeks for the untitled weekly health series. Both shows probably will be sold in a cash plus barter mix, although Miyares says this may vary by market. Both shows will involve a live studio audience.

The two pilots are being taped at TSS and will be unveiled to stations in a satellite news conference on Nov. 29.

While the talk-show host has yet to be decided, Miyares has selected the host for the health show, Dr. Tirso del Junco of Los Angeles.

Geraldo's home. TSS is home for the *Geraldo* first-run syndication series and also is the studio where Geraldo Rivera shot *Devil Worship* for NBC. Miyares hopes to transform the studio into one of the largest TV production facilities in the east, and to do that he needs to move aggressively into the production business himself, instead of just leasing his facility.

"I wish I could produce more," says Miyares. "We want to continue to do more things and become a major independent producer and supplier of Hispanic programming in the U.S. and to Latin America."

L. to r., Bill Vassar, v.p. marketing and program development, Times Square Studios; Ron Tarasoff, v.p. production and broadcast services; Marcelino Miyares, president.



Radio Audience Measurements-Spanish

Strategy Research Corporation announces its Radio Audience Measurement Study for the U.S. Hispanic market.
(RAMS)



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The TV sales pitch changes

General market approach emphasizes station research

Advertisers are no longer using Spanish-language TV stations just because they feel they owe it to the Hispanic community. They're being sold by these stations on the basis that they owe it to themselves. And it's working. The consensus of station managers is that advertising sales are up about 25% for the first nine months of this year, compared with the same period in 1987.

For example, speaking of his station's gains, Daniel D. Villanueva, president of KMEX-TV Los Angeles, reports, "A great portion of it is from new advertisers as opposed to other years when the acquired were increasing their tithes. Some of it was symbolic, but many were finding out they had a hidden treasure."

And from Emilio Nicholas, Jr., general manager of WXTV New York: "We're just trying to get them to accept us as another television station with viewers who have the same needs as other viewers."

Spanish-language stations are also putting a lot more behind their sales efforts by upgrading their sales staffs, both through training and through hiring salespeople with appropriate general market background. This is also evident in Puerto Rico, where stations are beginning to operate more and more like their counterparts in the conti-

mental U.S. (See accompanying story).

They're spending more heavily on research as well, giving advertisers hard evidence of where Spanish-speaking Americans are spending their money and how much is being spent. As Jose Cancela, vice president and general manager of KWEX-TV San Antonio, explains, "How can you ask an advertiser to invest in you if you're not investing in yourself?"

Despite their growing similarity in sales thrust to general market stations, these outlets are not turning their backs on an approach they've traditionally excelled in—merchandising and special-event promotions. In fact, advertiser packages including the likes of festivals, concerts, parades and in-store tie-ins are on the increase.

Network input

In operation for 21 years and becoming part of a network only two years ago, WNJU-TV New York, owned by Telemundo, is benefiting substantially from the network tie, according to Carlos Barba, president and general manager. For the first nine months, the station is up 22% in ad sales, he reports. Revenues including brokered time are up 32%, he adds.

While the station has less time of

its own to sell, as an owned affiliate, the network's success with major accounts has carried over into national spot sales with such advertisers as Chrysler, Slice, Burger King and Boar's head meat products.

But Barba's major concern now is maximizing local sales. He notes, "I don't know why the New York market is not as big in retail as Los Angeles, Miami and Texas. Here, national spot is about 60-65% of our income," about the reverse of what's seen in other markets. "We're working to change that."

Invisible Hispanics

One difference he notes is that, "In Los Angeles, it seems like there are 150 car dealers showing up on Hispanic television." In New York, he continues, there is not only the perception that Hispanics are not automobile buyers but also that they therefore don't travel the necessary distances to patronize certain retailers. He adds that Hispanics, being more clustered in the New York market, are less visible to local advertisers.

The station is attempting to carry over traffic-creating events that have been used in conjunction with Hispanic stores into such Anglo accounts as department stores, Barba says. "The big retailers had not been as open to our story previously, but they're listening to the whole story now."

In addition to selling with Arbitron and Strategy Research Corp. (SRC) data, WNJU is also making use of a Telemundo-commissioned study with Market & Opinion Research (MOR) that shows Hispanic buying habits. Barba says salespeople are now meeting with 10 general market stores to discuss the commissioning of specific research with the Hispanic customers who come into their stores.

While many other Hispanic stations have increased their number of special events, WNJU's have leveled off to seven or eight. One

WXTV New York announces car winner in parking lot.



example recently was a Pepsi Cola-sponsored evening at the Palladium, promoting Puerto Rican rock star Safire in conjunction with *MTV Internacional*, an MTV-licensed program appearing on the station. Clips of the event were used on the program.

As it expands its push for more retail business, WNJU is going to find its competitor, Univision-owned WXTV New York, working the same side of the street. According to Nicolas, the station is about 30% ahead in sales for the first nine months and expects to finish up the year similarly.

"We're taking a new approach to the market," Nicolas says. "We're looking at the larger retailers on a local level. We recently brought in Seaman's Furniture, and now we're targeting department stores, electronics chains and other furniture chains."

Nicolas, who had been president and general manager of Univision affiliate KDTV San Francisco, joined the New York station last April and "was shocked at the lack of representation of major retailers in any Hispanic medium in the market. I think they just hadn't been approached properly."

Significant data

His salespeople are now busy explaining to major retailers the significance of SRC studies on Hispanic viewing, and the station has commissioned some consumer usage studies in the retail categories being targeted.

As WXTV pushes primetime for major accounts, Nicolas discloses, this means "using a little better inventory control" for the smaller, existing accounts. This translates "charging more appropriate rates for primetime" and showing the smaller accounts how the other time periods suit their purposes.

While attempting to upgrade its primetime advertisers and the commensurate rates, the station has also been upgrading its selling staff, according to Nicolas, hiring more experienced account executives: "We've recently hired a couple of them who have experience in the general market but are accustomed to approaching the client with something he ordinarily might



WNJU-TV New York DJs Daisy & Eddie with Safire at the Palladium

not have considered—like smaller market English-language stations or specialty print media."

Meanwhile, WXTV has increased its merchandising events from about 10 last year to 15. This includes street fairs with attendance of more than 1/2 million. Clients have booths at these events, and the fairs are typically covered with two-minute inserts on the station throughout the day.

Viewer participation is a major draw in programs like *Vea y Gane* (*Watch and Win*), where clues are given for phrases to be repeated when viewers are called. Recently many of the approximately 30,000 final entrants for a drawing for a new car lined up in the station's parking lot to watch the winner's name drawn from a cement mixer.

Research pays off

At Univision-owned KWEX-TV San Antonio, Cancela reports sales ahead 30-35% for the first nine months and says the nation's oldest Spanish TV station is finally developing its true potential. Cancela, who joined the station a little over a year ago, says all San Antonio Spanish media had become too dependent on being part of the No. 1 Hispanic test market in the country—and those easy dollars had diverted them from plumbing local sales potential. He notes that, at this point his station is still bringing in 2 1/2 national dollars to every local dollar.

Cancela has concentrated on restoring a stable sales force, which the station hadn't had for a few

years prior to his arrival, and using research to bring in new local accounts.

While markets like Los Angeles, Miami and New York had been using SRC studies on demographics and psychographics, this hadn't been done in San Antonio until recently. This research, Cancela reports, "showed that this market is not as assimilated as people may think." He says the research, costing about \$50,000 for 800 in-home interviews and compilation of other data, was well worth it.

In conjunction with the research, SRC put on a full-day seminar, which involved slide presentation of the study's results and panel discussions of the Hispanic market by outside experts, particularly those from Hispanic advertising agencies. Even with attendees being charged \$45 apiece, more than 250 advertiser and agency representatives showed up. Cancela explains, "It would have been inappropriate for us to put it on as a station because that would dilute the viability of the study—and it benefitted all Spanish media."

While noting that a station has to first sell the dimensions of the Hispanic market and then the station's ratings, Cancela says it can go beyond being a pure numbers buy if it works with the advertiser in merchandising. A recent example was putting on a *charriada* (Mexican rodeo) for Gatorade. Coupons, headbands and samples of Gatorade were given out to about 3,300 persons who paid \$3 each to attend the event, with those funds used to subsidize participants.



KWEX-TV San Antonio hosts a special event.

On Sept. 15—Mexican Independence Day—the station created a three-day event at Sea World, selling exhibit space and station time to several national and local sponsors and producing a two-hour program from the event. Sponsorships run from \$5,000–\$12,000, typically including promotional spots on the station for the event, spots in TV specials based on the event, mentions during the event and booth construction and signage.

New awakening

In Los Angeles, Villanueva reports KMEX-TV is running about 16% ahead of last year for the first nine months. He attributes gains primarily to new advertisers who are awakening to the potential of the Hispanic market. He says professionals that have been unfettered from codes prohibiting advertising have been the most significant new advertisers. Lawyers are

foremost among them, advertising a range of legal services including immigration assistance, and Villanueva says they have bypassed furniture retailers and auto dealers to become the station's biggest category.

Medical services have also moved into the top five categories, he reports, including chiropractors, dentists and health maintenance organizations. Supermarkets and fast foods continue to be healthy categories.

"We get the majority of major supermarket chains in the area," he notes, "because Hispanics have larger families and their average grocery expenditures are somewhat bigger than those of Anglo families. We do regular consumption and consumer preference studies by case lot movement so that retailers can compare the results after advertising.

"This year we're getting political advertising from Democrats, Re-

publicans and proposition sponsors, and this was negligible in the last election. We're getting banks again; we hadn't had them for about four years; we were the first to be cut back when there was an economic downturn.

"All of this is a byproduct of the size and buying power of the market and of Hispanics moving upward in income. Agencies and clients are now asking us to come and make presentations. People are now buying us on our numbers. We've become more general-market oriented vs. being an emotional sale."

Villanueva says KMEX is now hiring salespeople from the general market—people who have been brought up in a highly competitive, numbers-driven environment: "We're becoming every day more like a general market station."

Among the research sources used are SRC and San Diego-based Market Development as well as some input from supermarket chains like Alpha Beta on case lot movement: "We can see how certain products are selling in Hispanic stores vs. non-Hispanic stores." He discloses the station is spending about 28% more on research this year than last, having shelled out more than \$325,000 this year.

Head-to-head competition

"A big change in the industry during the past three years," the station manager says, "is that promotion budgets have increased dramatically. We're in the promotion business because advertisers want both a spot schedule and an involvement schedule. We've budgeted 12 events this year vs. 10 last year and three the year before." These include concerts, parades and special promotions at Disneyland, Universal City and Knott's Berry Farm.

One sign that promotion is a big deal at KMEX is the fact that it now has a regular special events staff of three persons.

Last Sept. 15, for Mexican Independence Day, a station-sponsored concert in a city park drew more than 100,000 attendees.

Perhaps one of the reasons KMEX now stresses hiring sales-

KMEX-TV Los Angeles float for Mexican Independence Day



people who come from a competitive environment is that it's become fully aware of the head-to-head competition coming from Telemundo's KVEA-TV, which went on the air in November 1985 and became part of Telemundo in January 1987.

Frank Cruz, vice president/general manager of KVEA, sees some advantage in being the second station in the market, as well as being part of the second Spanish network: "All of our people had to sell competitively to begin with. We try to get people who can combine knowledge of the language with knowledge of TV and sales."

In seminars and workshops conducted by both the station and Telemundo, salespeople are learning how to sell competitively based on programming and demographics.

Cruz projects sales of \$20 million for 1988, up 43% from last year's \$14 million and says, "National is what has really picked up in 1988. Last year we were about 60/40 in favor of local, but we're close to 50/50 now. The major advertisers of America now see Hispanics as a critical mass that they must reach."

He adds that advertisers are impressed that major companies have taken a risk and invested in Spanish stations—Reliance Capital with its Telemundo, and Hallmark Cards and First Chicago Venture Capital with Univision. Additionally, "They're seeing significant increases in the number of Hispanics and in the media incomes of His-



KVEA-TV Los Angeles promotion in Tianguis Hispanic supermarket

panics."

In addition to making use of Telemundo studies, the station has commissioned focus group studies in the market to establish what viewers like and don't like about specific programs. These are not only used in programming but also in sales—for example, to show why consumers may prefer the station's newscast to others.

Cruz notes, "One of the underlying philosophies of the station is to be very strong in terms of counter-programming—for example, if they have soaps, we run movies. The second is to have a very strong newscast. And the third area is community involvement."

The station has seven or eight events a year, having decreased

them somewhat to concentrate on those that are most salable to sponsors. KVEA has, for example, become the official station of the Los Angeles Marathon. Viewers are told to go to a certain location during the marathon for entertainment and a "bag of surprises" filled up by such sponsors as Beech-Nut baby food, Procter & Gamble and Eastman Kodak. The surprise bags are given out at several events during the course of the year.

In-store contests are also important. For example, in a promotion with the Tianguis Hispanic supermarkets operated by the Von's chain, some 150,000 coupons were filled out at the stores in the course of three or four weeks.—

Ed Rosenthal

Leading stations in Puerto Rico see sunny days

Puerto Rico's two leading TV stations are making the most of a soft marketplace. For top-rated WKAQ-TV, this means a major thrust in new business development. And for WAPA-TV, which has improved its audience share substantially with new local programming, station management is looking for a big payoff in ad sales.

Gary Anderson, president/general manager of WAPA-TV San Juan, reports audience share went from a 14 in November 1987 to a 32 in August 1988 in primetime (6-10 p.m.) Monday-Friday. The inde-

pendent station, owned by Pegasus Broadcasting, recently completed a major programming overhaul, emphasizing locally produced programming vs. imported.

Primetime for the station now consists entirely of locally produced programs: two half-hour sitcoms in the 7-8 p.m. time period, a one-hour *novela* at 8 p.m., news at 9 and a 9:30-10:30 checkerboard including political satire, talk shows and variety.

Anderson reports that in the first six months of this year, no increase in ad sales was seen because the

station was still selling off the "disastrous" November book—on top of the fact that Puerto Rico has been a flat market and also a "negotiable market—with a great deal of packaging, bonus spots and where we very rarely sell off rate card."

He's hoping, though, to show a good increase at the end of the year. The increased ratings, he says, are now making for both new advertisers and rate increases and have "lured back many of the large accounts that had cut back their budgets with us."

To offset the expense of heavy local production, WAPA is "in the process of signing a contract with another company to distribute our programming internationally," Anderson reports. "We had been selling station-produced shows on a hit-and-miss basis to other countries." The station still uses a fair amount of Univision product, and its *Sabado Gigante* variety show is particularly successful.

WAPA recently had \$50,000 worth of research completed by Gaither International, San Juan, dealing with consumer viewing patterns and attitudes. This and a "partnership" approach with advertisers and agencies is helping the sales effort.

Special events are part of the mix. For example, Schaefer beer recently sponsored a Houdini-type escape event staged near a major hotel in the Condado area, and this was sold to Schaefer as an element inside the station's 4-9 p.m. Sunday *Domingo de Oro* (*Hour of Gold*) show, which involves variety and games. The show sells segments vs. spots, with each element sponsored and sets identified with the sponsor.

While WKAQ has been moving ahead rapidly in U.S.-style marketing approaches, the typical Hispanic approach to merchandising is something it has been little involved with, but this will change, according to David E. Murphy, vice chairman and CEO of Telemundo Puerto Rico.

"We'll be getting into merchan-

dising next year," Murphy reports. "We'll look at things like cooking shows, where the product can be integrated into the show. We'll also start putting on sponsored concerts around the island, which will be taped and played back as specials." A preview of this thrust recently was a celebration of the fourth anniversary of the Saturday 4-9 p.m. *Super Sabados* at Roberto Clemente Coliseum. Featuring "the best of Puerto Rican talent" in this live broadcast, it drew a crowd of about 18,000.

New business development

But the station appears to be doing just fine with more-traditional sales approaches, and Murphy says that, for the first nine months of the year, sales increased "in the low teens" over the previous year's like period. He adds, "Most people think the market is flat, but I think it's growing on the average of about 7% for television. I also hear newspaper and radio sales are growing. This is one of the unique markets where there's more billing in television than in print. The market is very electronically oriented."

About \$2 million of the station's sales increase reportedly comes from new business, with the station having started a new business development department a year ago. As part of this, New Jersey-based consultant Noll & Co. advised WKAQ on how to bring in co-op money. Murphy says this is just beginning to pay off.

"Mostly," he adds, "we've been expanding the categories we've had—convincing smaller retailers with three or four stores that TV is affordable and showing them how we can produce a commercial efficiently. This way we've been able to divert money from print."

Many of the commercials are produced at Cosmovision, the Telemundo commercial production center that Murphy is also responsible for. Also in his domain are a program production center, Telemundo International Program Sales and network-type sales for WORA-TV Mayaguez, an affiliate covering western and central Puerto Rico.

The Puerto Rican ratings service, Mediafax, measures the entire island as a market, so separately owned WORA counts into WKAQ's ratings, having made for a 44 share sign-on to sign-off in last August's survey. There are 10 stations in the market. Murphy notes that, if Puerto Rico were ranked along with U.S. markets, it would be about the 22nd.

In the past year, the sales department for the station has been expanded from six to 10 persons, and general sales manager Joe Pagan has set up a formalized in-house sales training program, conducted on a weekly basis. Included are sessions on the art of negotiation, research and packaging. "As the market gets more sophisticated, we want to keep ahead of the game," Murphy concludes. "We expect to go to meters around 1990." □

Escape artist at WAPA-TV event



WKAQ-TV makes "Super Sabados" an event.





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Viewpoints

Gene F. Mater



For many years a senior officer of the CBS Broadcast Group, Mater took early retirement in 1986. He is now affiliated with John Adams Associates, a Washington international public affairs and management consulting firm.

Network death wish: putting standards in others' hands

Once upon a time my business card noted that I was the senior vice president, policy for the CBS Broadcast Group. In that capacity, one of the areas reporting to me was program practices.

From time to time, others in the CBS hierarchy would ask why we couldn't cut the staff from the 70 or so to a more manageable, and less costly, 50 or 30 or so. And I would patiently explain why not and then justify the higher numbers, covering both program and commercial clearance.

After all, we were talking about the last people to pass on a program and approve a commercial before feeding the affiliates and the audience. Indeed, no salesman or sales vice president, no program executive or president of entertainment, no similar ranking individual in sports, could unilaterally overrule program practices. Now all that has changed. The numbers are indeed manageable and less costly, down to 30 or less at CBS and the other networks. The watched will be doing the watching. And broadcasting and the viewing public will be the losers.

The people in program practices at CBS basically served as the conscience of the industry. They were, in fact, traffic cops who tried to keep Hollywood and Madison Avenue at a 55-mile-per-hour speed limit. A mile or two or three or four above that might be acceptable, particularly in the hours when traffic was light—late night, for example. But they blew the whistle when the speedometer reached 60 or 65.

Further, at CBS—and undoubtedly at ABC and NBC—program practices personnel weren't simply blue-nosed censors who ordered the deletion of the four-letter words on pages 15, 18 and 20 of a script or arbitrarily rejected commercial announcements. They worked with the writers and producers and ad agencies to come up with alternative ways to communicate the message.

By the way, scripts did, probably still do and always will come in with real, honest-to-goodness four-letter

words sprinkled throughout. The reduction in program practices staffing doesn't mean that those four-letter words soon will be on the screen but...

There are those of my former colleagues in broadcasting who feel that Hollywood will be able to police itself. And there are indeed many fine people in Hollywood, but I'm not sure that I would put my trust in the producer who used to argue that television would never come of age until it showed full-frontal nudity. Or the one whose justification for the proposed use of some blue language in a miniseries was that the words were in the Nixon tapes. Remember, dear station manager, that these two gentlemen—and their friends and neighbors—have no licenses to protect; you do.

The program horror stories are many and generally sexier than those involving commercial clearance, but there are tales of woe there, too. On a shelf in my workshop in Virginia stand some samples of products that we turned down completely, such as the over-the-counter guaranteed cure for herpes.

Then there are the subtleties that aren't always immediately obvious. Like the commercial that showed the happy young couple heading off into the country on a motorcycle, she clutching a picnic basket while a six-pack of a noted beer was strapped to the carrier in back. Hey, guys, asked program practices, does that mean that they go off into the woods, eat the food, drink six cans of your beer and then get back on that bloody bike? And so another commercial died.

Reel show in Congress

Actually, the best of the material—programs and commercials—that never made air frequently were strung together on show-and-tell reels to offer up to House and Senate committees to demonstrate how good the networks were in excising nudity, violence and other frowned-upon aspects of proposed television fare. We also showed reels of commercials that we wouldn't air—and didn't air—thanks to our ever-alert program practices staff.

Now I would like to show those same cassettes to all the station managers who feel that the answer to the network action is simply to be a little more vigilant on the station level. Those 70 or so people at CBS program practices—and the similar individuals at ABC and NBC—were busy people, working for you. You'll have a hard and costly time replacing them.

But there is another problem that should be addressed.

The republic will not fall because program practices staffs have been decimated. However, the probability of a downturn in program standards and in the entire commercial acceptance process is very real. Who will be the first regulator, congressional or federal agency, to try to step in to fill the void?

I spent too many happy years at CBS to play industry sould at this late date. However, this issue was too close for too long. Eliminating, or even simply drastically cutting back, program practices seems to be exercising a death wish by inviting the intrusion of government and the outcries of special interest groups.

In the immortal words of Pogo, "We has met the enemy, and they is us."

Programming

Marketplace spurs new negotiations between producers and syndicators

The tough marketplace in syndication is causing some marked differences in the way producers and syndicators/distributors do business with each other, throwing out some of the standard business practices on several levels.

While both producers and syndicators generally keep their negotiations sub-rosa, a few syndicators were willing to give out business dealings information, so long as it wasn't for attribution.

Before the marketplace took a downturn a year or so ago, the clearance game for distribution rights from a producer worked like this: Syndicators either received a flat fee based on clearances, or about \$2,000 per percentage point of the country covered. For example, if a syndicator cleared New York, it would get about \$16,000, because New York represents about 8% of all the U.S. TV households. The distributor would stand to get as much as \$200,000 per program, based on 100% clearances.

When it comes to all-barter shows, the syndicator has been getting an average 10% of the sales it brings in to the producer. Obviously, however, the actual commission is based on potential revenues and the type of show.

To handle both the clearances and the sales of a barter program, the distributor has been getting about 35% of the show's profits from license fees and barter time. In the case of the offnetwork *Cosby Show*, for example, Viacom will wind up with a 32.5% distribution fee, while Group W, via its barter syndication entity, will get about 2.5% for selling the barter time.

But conditions in the marketplace being what they are, the face of negotiations has changed, the sources say.

More deals. "There are more deals now," says one syndicator. "The standards of the business have changed immensely now. Now everything is negotiated. Look at the competition you have as a result of the alliances. Orbis Communications, LBS Communications and others like that are all selling time for others.

"If the standard is 10% of sales for a good show, someone else will do it for 5 or 6%. The big companies have the clout to be able to negotiate. They have the people in place and, having to keep paying for the overhead, they will take on any large number of clients."

Even the smaller distributors

have cut their prices as well, points out another source. "They have had to undercut the usual prices to compete with the bigger syndicators, as well, which cuts the margins of what the small company can make."

All this has surfaced, he continues, because it's getting "tougher and tougher in the marketplace in terms of time periods. In clearances, it's even tougher. When you sell the time, it's against guaranteed CPM's."

Another way. Another way in which business practices have changed because of the soft climate is that syndicators are more reluctant to risk their own dollars in putting up a guaranteed portion of production money requested by the producer. "However, now a lot of syndicators won't give the producer the guarantees he wants," according to one of the sources. "We now put our own yardstick on the show—what kind of a rating it will do, who we can sell the time to, and which stations would clear it. We may tell the producer, 'Don't spend \$100,000 on a show. Make it for \$50,000, and we'll help out and you will make a profit.'"

One on-the-record comment comes from Paul Siegel, president of LBS Entertainment, who says that producers are looking for programming that is cost-effective more than previously. "They can't afford to pay an exorbitant amount for production costs, so the producers are more responsible now in looking for ways to reduce production, whether it's through foreign coproduction or nonunion.

"Distributors are saying to the producers they can't afford to help in funding the production unless it's brought in at a certain price."

Regarding lowering of fees, Siegel says a syndicator is better off just putting money in a bank, then taking the risk of helping to finance the show while taking less than the normal fees.

In fact, it's noted that usually a syndicator/financier gets some additional considerations in financing a show. In the case of *Family Feud*, LBS is understood to have put up a hefty \$20 million guarantee for the production costs. One source says he believes that LBS



The new "Family Feud," game show introduced the past fall by LBS Communications, which put up a reported \$20 million in production costs. The program has just been renewed for a second year of production. Series is produced by Mark Goodson Productions.

must be getting a higher rate of compensation for clearing and selling the game show, plus "a piece of profits over and above, and some of the ancillary rights. Remember, in effect, the distributor is guaranteeing the production of the show. LBS didn't put up all that money just for a simple fee arrangement."

Siegel declined to comment on the deal with *Feud's* producer, Mark Goodson Productions.

Product example. One example of syndicators becoming more reluctant to take on product without careful scrutiny is *D.C. Follies*, which was distributed by Syndicast Services before it went out of business several months ago. The series, which wound up being distributed by Raymond Horn Co., was just tied up by Cannon Entertainment via the show's creators, Sid and Marty Krofft, to produce the future shows.

But, according to sources, *Follies* was being shopped around, and several of the smaller syndicators determined the series to be a financial risk. One source puts it this way: "They wanted someone to guarantee the money to produce the shows, something like \$100,000 per week. If you look at five half-hours, and say I get five 30s a day or 25 per week at a 2 rating, what can I sell it for? We looked at the economics of it and said that even if you work your tail off, you're lucky to come out even. We are not in the business of working for nothing or deficit-financing producers."

—Robert Sobel

Henson Associates now Henson Prods.

Henson Associates, New York, has been renamed Jim Henson Productions "since production is our main focus," says Bob Beitcher, managing director.

The Henson name also will crop up on a forthcoming NBC prime-time series, *The Jim Henson Hour*, due "in early 1989." Several agency sources expect it to bow in January.

The NBC series, a commitment since early this year, will include at least one semiregular segment—*The Storyteller*, which had been airing as periodic half-hour specials.

NBC to unveil miniseries, 'Pursuit,' in December in flood of genre debuts

Yet another miniseries is due on the network TV primetime schedule before year's end, NBC's *Pursuit*, in December.



Veronica Hamel in "Pursuit"

That two-parter thus will be the eighth first-run miniseries slated to air between October and December. NBC's planned air dates are Dec. 11 and 12. Part one will oppose ABC's *Roots: The Gift*, due as an AT&T Presents special.

Pursuit is a fiction drama about an SS officer (Ben Cross) who evades prosecution as a Nazi war criminal by disguising himself as a Jewish concentration camp victim. The ex-Nazi, who later falls in love with Veronica Hamel's character, becomes a founder of Israel—only to have his secret uncovered. The project was coproduced by Larry White, a onetime NBC vice president of programming at Columbia Pictures Television.

Strike delays one NBC 'wheel'

ABC's *Saturday Mystery Movie*, one of two "wheel" series planned for this fall, has been delayed considerably by the writers' strike. ABC now is hoping for a January start.

NBC's *Magical World of Disney*, the other wheel anthology (TV/RADIO AGE, June 13), will start its rotating *Davy Crockett* series element on Nov. 20 with a two-hour episode and *The Absent-Minded Professor* a week later.

Both projects, each with several alternating "spokes," were given relatively high marks last summer by ad agency buyers, based on programs' premises and scheduling. NBC has been filling in with Disney specials and oldies like *Dumbo*, while ABC has been airing two-hour *Police Story* episodes, remade from old scripts from the 1970s. (At that time, *Police Story*, like the *Columbo* element of the *Mystery Movie* package, aired on NBC.)

Peter Falk's *Columbo* is the "farthest along," with several scripts already written, according to John Sias, president of the ABC-TV Network Group. Burt Reynolds' untitled private-eye series, on the other hand, has yet to finish its first teleplay, he adds. Lou Gossett, Jr.'s entry, *Gideon Oliver*, is "somewhere in between."

Sias says, "You better believe we're concerned" about the slow

pace of the *Mystery Movie* productions. Still, the executive expresses confidence that the package could boost viewership once it appears on Saturday nights.



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USA Network looks to new partnerships on West Coast for more coproductions

USA Network's new programming office in Los Angeles is looking to the local creative community for original projects because "this is a 24-hour network, and it eats up programming like crazy."

That's the explanation for Thomas Piskura's presence in the company's Century City office where he's meeting to discuss programming ideas and to get development deals rolling. David Kenin, USA's senior vice president, programming, who headquarters in New York, says the coast office is used to discuss film scripts, series ideas and licensing of programs coming off the networks.

USA's latest venture is its first coproduction, *Not a Penny More, Not a Penny Less*, a four-hour miniseries with Paramount, BBC and Revson of France. The show will be shot in London, Paris, Boston and in the south of France. "We're looking to do more international coproductions if it makes sense," notes Kenin.



David Kenin

Being discussed is a project with Dick Clark. USA already is in production on three new series: *Ray Bradbury Theater*, *Alfred Hitchcock Presents* and *Diamonds*, all of which are being done in Canada. Also, in preproduction are several new episodes of *The Hitchhiker*, which started on HBO.

Deals signed. The cable company has signed deals for action, science-fiction and entertainment films with Paramount, MCA and the new Gulf & Western owned Wilshire Court. G&W owns Para-

mount, which in turn is 50-50 partner in USA with MCA. One film area USA will stay away from, according to Piskura, is "socially-conscious" films.

Global TV is the financial partner in both *Hitchcock* and *Bradbury*. Three game shows for the network are also being done in Canada: *Jackpot*, *Bumper Stumpers* and *Chain Reaction*. Lower production and crew costs are the reasons these shows are done north of the border.

"As for the film deals, Kenin asserts, "We're making 26 movies in Los Angeles, and that's more than ABC is making. Our money spends just as well as any of the networks." He says USA's licensing deals are competitive, avoiding specifics.

"We feel 1989 will be a substantial year for the production of original programming for us," Kenin says. Production is nearing completion on 41 new, exclusive episodes of *Alfred Hitchcock Presents* in Toronto. Twenty-five of the new half-hours will have aired by the end of this year. USA acquired 26 off-network episodes of the mystery series in 1986 and then commissioned 13 original, exclusive shows which were produced prior to the commitment for 41 additional stories.

Piskura stresses USA is "picking its shots. It is not looking to create programs on a wholesale basis across primetime."

Piskura says USA is not looking to create shows on wholesale basis

Currently 40% of its programs are of an original nature, according to the two officials. Kenin says the company's objective is to get to the 80%-90% original level. "If we could produce every hour with original programming we would. But when you're averaging a 1 rating

sign-on to sign-off, you can't do that."

Whether USA was running the old *Hitchcock*, which aired on NBC, or the made-for-USA segments, Kenin notes, they equally drew 2 and 3 ratings.

Primetime hit. What will give USA the explosive ratings lift it needs as it grows financially? "A primetime hit," responds Kenin. "It will take one or two hit shows, and the entire value of basic cable will be enhanced."



Thomas Piskura

One criticism of basic cable is that it is purchasing off-network series too readily and is becoming a carbon of over-the-air broadcasting. Shows like *Miami Vice* and *Murder, She Wrote*, which USA airs, "are part of the mix that helps draw people," explains Kenin.

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Television/Radio Age

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USA Network looks to new partnerships on West Coast for more coproductions

USA Network's new programming office in Los Angeles is looking to the local creative community for original projects because "this is a 24-hour network, and it eats up programming like crazy."

That's the explanation for Thomas Piskura's presence in the company's Century City office where he's meeting to discuss programming ideas and to get development deals rolling. David Kenin, USA's senior vice president, programming, who headquarters in New York, says the coast office is used to discuss film scripts, series ideas and licensing of programs coming off the networks.

USA's latest venture is its first coproduction, *Not a Penny More, Not a Penny Less*, a four-hour miniseries with Paramount, BBC and Revson of France. The show will be shot in London, Paris, Boston and in the south of France. "We're looking to do more international coproductions if it makes sense," notes Kenin.



David Kenin

Being discussed is a project with Dick Clark. USA already is in production on three new series: *Ray Bradbury Theater*, *Alfred Hitchcock Presents* and *Diamonds*, all of which are being done in Canada. Also, in preproduction are several new episodes of *The Hitchhiker*, which started on HBO.

Deals signed. The cable company has signed deals for action, science-fiction and entertainment films with Paramount, MCA and the new Gulf & Western owned Wilshire Court. G&W owns Para-

mount, which in turn is 50-50 partner in USA with MCA. One film area USA will stay away from, according to Piskura, is "socially-conscious" films.

Global TV is the financial partner in both *Hitchcock* and *Bradbury*. Three game shows for the network are also being done in Canada: *Jackpot*, *Bumper Stumpers* and *Chain Reaction*. Lower production and crew costs are the reasons these shows are done north of the border.

"As for the film deals, Kenin asserts, "We're making 26 movies in Los Angeles, and that's more than ABC is making. Our money spends just as well as any of the networks." He says USA's licensing deals are competitive, avoiding specifics.

"We feel 1989 will be a substantial year for the production of original programming for us," Kenin says. Production is nearing completion on 41 new, exclusive episodes of *Alfred Hitchcock Presents* in Toronto. Twenty-five of the new half-hours will have aired by the end of this year. USA acquired 26 off-network episodes of the mystery series in 1986 and then commissioned 13 original, exclusive shows which were produced prior to the commitment for 41 additional stories.

Piskura stresses USA is "picking its shots. It is not looking to create programs on a wholesale basis across primetime."

Piskura says USA is not looking to create shows on wholesale basis

Currently 40% of its programs are of an original nature, according to the two officials. Kenin says the company's objective is to get to the 80%-90% original level. "If we could produce every hour with original programming we would. But when you're averaging a 1 rating

sign-on to sign-off, you can't do that."

Whether USA was running the old *Hitchcock*, which aired on NBC, or the made-for-USA segments, Kenin notes, they equally drew 2 and 3 ratings.

Primetime hit. What will give USA the explosive ratings lift it needs as it grows financially? "A primetime hit," responds Kenin. "It will take one or two hit shows, and the entire value of basic cable will be enhanced."



Thomas Piskura

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cess, *Betcha*, which will be produced by Murray Schwartz Enterprises and offered on a cash-plus-barter basis. Marjoe Gortner and Marlise Ricardos, current Miss California, will host.

Select Media Communications/The Maltese Companies will syndicate the fifth annual *Mrs. of the World Pageant* in a window between March 15-April 16, and the 23rd *Victory Awards* in a July 15-Aug. 27 window. *Pageant*, a two-hour special, has a 12/12 barter split, and *Victor*, one-hour program, has a barter split of 6/6.

Republic Pictures Domestic Television has added six markets to its Color Image feature film package. New stations are WRGB-TV Albany, KOKI-TV Tulsa, WFLX-TV West Palm Beach, KLRT-TV Little Rock, KNMZ-TV Albuquerque, and KCCI-TV Des Moines. Barter sales are handled by TeleTrib.

Zooming in on people

Richard Buck has joined **International Advertiser Sales** as senior vice president. He comes to I.A.S. from TeleTrib, where he was an account executive handling shows including *Entertainment Tonight*, *Star Search* and *Lifestyles of the Rich and Famous*.

Barry J. Stoddard has been promoted to manager of research at **Group W Productions**. He joined Group W a year-and-a-half ago as research analyst. Prior to Group W, Stoddard held marketing positions at the Wrangler division of Blue Bell, and International Rectifier.



Barry Stoddard

Stuart Walker has joined **Columbia Pictures Television** as account

executive, syndication, midwestern division. Before CPT, he was an account executive at Petry Television since 1986. From 1984-85, Walker worked in the sales area with CBS Affiliate WCIA-TV Champaign-Urbana.



Stuart Walker

Jay Leon has been promoted to research manager at **Camelot Entertainment Sales**, and **Jeanine M. Troisi** has joined Camelot as a research analyst. Leon previously was a research analyst at Camelot. He joined the company in January and was an analyst at Petry TV before that.

Jack Flowers has been named senior vice president, marketing, at **American Film Technologies**. He had been sales vice president since 1986, in charge of the Los Angeles office. Flowers was the first employee hired in 1985 to market the company's securities. AFT produces color versions of motion pictures originally produced in black-and-white.

Neil London has been named vice president, marketing, **Winner Communications**. London previously was managing director of Eyewitness Marketing International.

Al Schwartz has been promoted to senior vice president of production at **Dick Clark Productions**. He has been a vice president of production for 10 years. Among his credits are producer of the CBS series *Dick Clark Presents...* and of many specials. Previously, Schwartz was coproducer of the *Bloopers* series.

Steve Mills has been appointed senior executive vice president, programming, **Qintex Entertainment**. Mills most recently was vice

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president, motion pictures for tele-
vision and miniseries at CBS En-
tertainment, a position he held
since April 1979. Before that, Mills
was vice president in charge of se-
ries for three years.

Jon M. Nottingham has been pro-
moted to president of distribution
station sales at **LBS Communica-
tions**. He had been executive vice
president, sales and marketing.
Prior to joining LBS in September
1987, he spent eight years at Arbi-
tron, where he completed his ten-
ure as vice president, television
sales.

Dennis Franklin has been pro-
moted to eastern division manager
at **King World Productions**. He
joined KW in 1986. Before that,
Franklin was advertising sales
manager at Comcast Cable and was
also director of sales for the Michi-
gan Panthers.

Jim Martz has been appointed
vice president, research and sales
development, at the domestic TV
division of **Paramount Pictures**.
Martz joins Paramount from Co-
rinthian Communications, where
he worked for 15 months.

Bill Sheinberg has been named
vice president, development at
MTM Television. He comes to the
television division from MTM Mo-
tion Pictures, where he was vice
president.

Cable programming

ESPN's 10th season of televising
NCAA basketball will total 211
games, its biggest ever, including
173 live regular season games fea-
turing all of the 1988 NCAA tour-
ney's final 32 games. Coverage be-
gins Nov. 18.

Turner Broadcasting System's
Headline News segments on busi-
ness and financial news will be
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clude the latest stock market and
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the personal finance report, will air at 15 minutes every hour and half-hour; segment C will be devoted to sports news; and segment D will consist of entertainment, personal and lifestyle news.

The **CBN Family Channel** has completed the reorganization of its programming department with the appointment of two executives. **Terry Botwick** has been named director of original programs, and **Mike R. Gwartney** has been appointed program executive for feature films and research.



Mike Gwartney

The Slap Maxwell Story, recently acquired by the **A&E Cable Network**, will premiere on the network on Jan. 7, 1989 at 11 p.m. It joins the network's roster of TV comedies, *Cult Comedy*, shown late night. Others in the program series are *Buffalo Bill*, *United States*, *The Associates* and *Police Squad*. All had been on the networks.

Gary Keeper has been appointed senior vice president, original programs, **Showtime Networks**. Keeper joined Showtime in February, 1985, as production executive. Before that he produced a pilot for CBS and Universal Television and was vice president of program development at Paramount Television.

AFT in new color pact with TBS

American Film Technologies will Colorimage as many as 180 black-and-white films from Turner Entertainment Co. over a five-year period, under an expansion of the agreement by the two parties.

According to the terms, AFT will deliver a minimum of 24 Colorimaged films per year over the next three years. The value of the extended contract, covering 72 films, is estimated to be \$32 million.

In addition, Turner has the options to order up to 12 additional films per year over the three-year period, and for an additional 36 films per year for the fourth and fifth years of the agreement.

Four syndicators involved in alliances

Alliances among syndicators are heating up again. Two new agreements have been reached over the past few weeks.

These are:

■ **LBS Communications** and **Columbia Pictures Television**, in a multimillion dollar distribution agreement giving LBS distribution rights to *The Real Ghostbusters*, *What's Happening* and *Crazy Like a Fox* plus series classics from Columbia's programming library.

■ **Camelot Entertainment**, in a three-year agreement with **Joslyn Entertainment** whereby Camelot will sell advertising time for all Joslyn's syndicated live "Super Events."

In the case of LBS and CPT, the deal involves the takeover of the distribution in terms of clearances and sales of the three series *Real Ghostbusters* is offered via barter; *What's Happening* goes for a cash license fee; and *Fox* will be offered on a 72-week barter basis, available for March 1989.

According to Paul Siegel, president of LBS Entertainment, the arrangement with CPT was made for two major reasons: an extension of its previous tie with Colex, and because CPT's distribution concentration at this time is toward its off-network properties now coming into focus. "Their organization has the expertise in that area," says Siegel, and "we have the expertise in a lot of syndication first-run properties, plus some of the classics."

In the case of *Ghostbusters*, Siegel says LBS is strong in the kids' area. "Columbia has never distributed that kind of property, so we feel our expertise will help out. The kid marketplace is still very strong, and with a property such as *Ghostbusters*, we expect to do well. There is still a good advertiser base, and kids are still a very important part of the advertising income coming to stations. I'm not talking about toy advertisers as much as I am about advertisers selling to kids.

"More and more package goods advertisers are finding that children—particularly those between 9 and 14 control what is bought." And, Siegel adds, LBS is looking for young teen and teen-oriented properties that reach that kind of advertiser. *Ghostbusters* has cleared 90% of the U.S., and in several markets the stations have been upgraded.

In the case of *What's Happening*, Siegel explains, the sitcom is a known product to LBS. "We have a financial interest in it and have been involved in it for a few years, handling the ad sales. We like the property and decided to continue with it." *Crazy Like a Fox* "was sitting in the Columbia library and not doing anything, so we suggested to go out with it. It had a reasonably good network run and has a great cast."

Both *Ghostbusters* and *Happening* clearances had been handled by CPT, while LBS had been responsible for the ad sales.

In the Camelot (King World barter division) situation, Joslyn will handle the production as well as distribution of its Super Events specials. The first special to be produced will be *Treasures of the Third Reich*, which, according to John Joslyn, took more than two-and-a-half years to be developed.

The special will not only trace the large loads of gold, art, jewelry and money secretly lifted from Germany, but a Nazi U-Boat containing war booty will be salvaged. Also, the program will explore locations where the Nazis stored plundered loot and will go to South America to expose art that has been stashed away for 50 years.

The Fox and Gaylord station groups have made longterm commitments to the specials.

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but raise ears/121

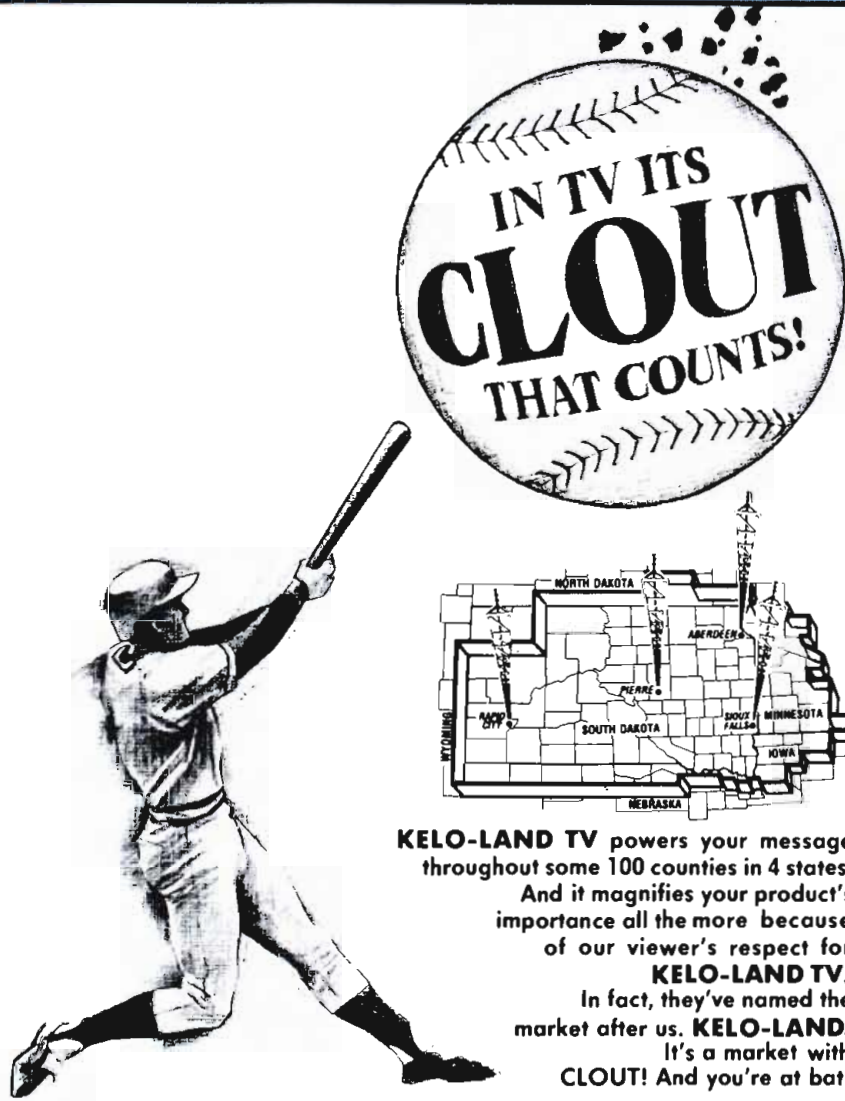
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Cleveland's WZAK discovers ratings go much higher as bottoms draw ire; goody-goody promos no big aud draw

WZAK(FM), the Cleveland urban contemporary station that once brought its listeners "Four-Play"—four records, back-to-back with no commercial interruptions, has gone that promotion six better by offering "10 back-to-back hits" with no time outs for advertising.

And again, it's getting complaints by local groups about the way WZAK is promoting it: billboards and bus-shelter posters showing off the bikini-clad backsides of a row of 10 beach lovelies.

To placate the critics, WZAK's promotion people had the bikini bottoms on each poster covered with a big "Censored".

But one group, the Grass-Roots Political Action Committee (G-PAC) of Cuyahoga County, still complained that the signs are "sexist and morally unhealthy," and called for advertisers to boycott the station.

G-PAC says it isn't trying to censor WZAK: "We're just trying to appeal to its sense of decency," said a spokesman.

But WZAK program director Lynn Tolliver claims, "It's not our listeners who are complaining. During the first 10 weeks our posters were up we got only three calls complaining about them."

Mike Hilber, vice president,

"It's only when we do stunts that some may consider outrageous that we get recognition."

sales for the Zapis Communications station, says that when WZAK asked its female listeners if they felt offended, most said no, though a few allowed as how the posters "may not have been in the best possible taste."

Hilber adds that, though WZAK's community service projects have included funding two scholarship programs and promotion of such organizations as the United Negro College Fund, the

NAACP, the American Cancer Society, the American Heart Association, the Hunger Task Force with Mayor Voinovich, and the Cleveland Board of Education's Perfect Attendance campaign, "Experience has taught us that such activities bring little or no recognition to the station. It's only when we do stunts that some may consider outrageous or do semicontroversial ad-



Bottoms up. Cleveland's WZAK(FM) had some fun and a little controversy over its "back-to-back hits" campaign.

vertising that we get real recognition and attention. Recognition increases our chance to gain more listeners. After our public service commitment, building our listener base is our most important job."

Hilber also observes, "It's not as if our station was the first business enterprise in the country to invent using pretty women in advertising. Blue jeans companies do it. Soft drinks do it. Health clubs do it, and cosmetic companies do it. Look at Jovan Musk. They built a whole campaign around very graphic suggestions of 'What sexy is.'"



WXTV(TV) boosts Spanish Advertisers

"As consumers, it is important to you to know the difference between similar products, services and retail outlets. The advertisers you see on this station distinguish themselves by supporting our culture and our identity, only in Spanish. We ask that you consider this when deciding where to spend your money. That is why we say, when you

Emilio Nicolas, general manager of Univision affiliate WXTV New York, goes on the air urging viewers to support advertisers "that enable us to remain in business."



see these companies and their products here on Channel 41, support them. They are with us."

General manager Emilio Nicolas, Jr., gets on camera and says this himself, in Spanish, to viewers of Univision affiliate WXTV(TV) New York. Nicolas is the man who's brought his practice of delivering his own station editorials from his previous post as general manager of Spanish-language KDTV(TV) San Francisco-Oakland, "to show that our station is with its viewers, working for the benefit of its viewers with editorials on such subjects as saying no to drugs, explaining the benefits of bilingual education in working to stem the alarming school dropout rate, warning of the danger of AIDS, exposing the facts in incidents of police brutality, and urging parents to make sure their kids have a special, regular place and time to do their homework, even if it's only one end of the kitchen table.

When he editorializes, stresses
(Continued on page 122)

Nicolas, "It's for attainable goals that people can easily understand, and goals that are ultimately for their own good. In the same way, we feel that urging our viewers to buy products they see advertised on Channel 41, supplied by companies who care enough to sell them in Spanish, is also for the good of our viewers," Nicolas said.

"After all, these are the compa-

nies that enable us to remain in business. Staying in business is the only way we can be in a position to stand up for our viewers' best interests on the issues that affect them and their families. Our viewers know that if there's a problem that particularly affects Hispanics in the New York area, we're all in it together and that our advertisers are also on our side and theirs in fighting the good fight."

Oldies click for Viacom's Seattle FMer; 'Singing in the Shower' promo a splash

When Viacom bought its Seattle cable system for \$83 million and the sellers threw in their top-40 radio station, KNBQ(FM) for another \$6.5 million, just for laughs, there were three other top 40 stations in the market.

As a result, says bill Figenshu, president of Viacom's Radio Division, "We built a new tower and switched to oldies—but oldies strictly for Seattle's 25 to 54s—not any clone of anybody else's oldies."

Figenshu observes, "You can get a distorted view of the rest of the world working in Manhattan if you don't get out of New York once in a while. So I went out and lived in Seattle for three months, doing nothing but listening to the competition. Then we started our research. We talked to more people

than Arbitron does. The result was music that goes back as far as 1955 and up through the mid-'70s. Now we have a station that's built on emotion—great music and great memories. We play the Beatles. We're not afraid to play Andy Williams. We play Bill Haley and The Comets. We play Bobby Vinton from the '50s, Motown and the Mamas and Papas from the '60s, Chicago from the '70s. And we changed the call letters to KBSG."

There's a switch. He says that to promote the new station and its new format, "We tried honesty... We don't mix in a lot of top-40 like some of our competitors. And we invited listeners to call our request line for their favorites."

The wildest promotion was the



Bill Figenshu, president of Viacom's radio division, spent three months in Seattle, "doing nothing but listening to the competition." Then he launched KBSG(FM).

KBSG/Lever Brothers "Singing in the Shower" contest. Contestants performed in a customized "K-Best" tub with real running water: "But don't try this at home." And they sang their favorite oldies numbers in costume.

It was billed as "Another unique promotion for the radio station that plays the best oldies and keeps it clean between the songs—and from the company that keeps you clean—Lever Brothers."

Top honors. Winner Steve Henderson entered the contest at the Western Washington State Fair during the local semifinals. He took top honors with his hand-puppet rendition of "Hotel California". And later, when he went on to Beverly Hills for the national finals, Henderson took the \$5,000 grand prize and appearances on *Entertainment Tonight* and *Good Morning America*.

But singer Henderson wasn't the only winner. Figenshu says that when he got the Spring Arbitrons, "Our rating had climbed from KNBQ's 19th in the market to sixth in 25-54. Twelve-plus is great, but to me, it's a family reunion. Then the summer book showed us coming in third in Seattle in 25-54."



Singin' in the Shower. Shown l. to r.: Seattle's KBSG morning team, John Ross & Chet Rogers, vice president/general manager Bruce Raven-Stark, promotion & marketing director Suzanne Gregory, "Singing in the Shower" grand prize winner Steve Henderson and program director Ron Erak.

Appointments

Stations



John J. Dorkin has been appointed vice president and general manager of Blade Communication's WDRB-TV Louisville, Ky. The former vice president, news and programming for Corinthian Broadcasting has most recently been director of programming at Petry Television.



Thomas J. Reeve has been named to the new post of vice president, regional sales and corporate development, CBS Radio Networks. He joined CBS in 1979 as an account executive at WBBM Chicago and now moves up from Eastern sales manager and director of youth sales. He reports to **Stephen J. Youlios**, vice president sales, CBS Radio Networks.

Donna Fadal has been promoted to general sales manager of Sandusky Newspapers' KEGL(FM) Dallas-Fort Worth. She steps up from local sales manager to succeed **Gary Robb**, now general manager of Sandusky's KLSY(FM) Seattle.

John Dowd is now general sales manager at WSPA-TV Spartanburg, S.C. The former vice president, general sales manager for WOWT-TV Omaha has most recently been president of Broadcast Media Consultants.

One Seller's Opinion



More Hispanics means more sales for those who sell in Spanish

Escalante

Success is a very relative circumstance. To some, success may be the ability to purchase a new car. To others it may be a promotion to assistant supervisor. Yet to someone else, simply having a job, food and an education for the children is success.

In the latter sense, the United States is a synonym for success in many parts of the world, particularly for many Latin Americans, given the proximity of borders. To many in other countries, the thought of earning dollars, in any amount, is a dream whose materialization would be closely linked to success.

But this is at the low end of the social scale. The U.S. is also a frontier of opportunity for many middle-class and well-to-do Hispanics: teachers, accountants, nurses, advertising executives, secretaries, doctors and lawyers. It is a land that offers higher monetary incentives, more technology for the realization of creative ideas, and in the case of certain Latin American countries, freedom of speech and movement. With such hopes of liberty, justice and dollars, the Great Wall of China and the Iron Curtain combined would not be sufficient to deter immigration.

Lack of "breathing space" alone may instigate emigration. Strategy Research Corp. figures comparing the population of Latin America to the combined populations of the U.S. and Canada show that in 1950 the two population groups were neck-and-neck, at 165 million for Latin America and 166 million for the U.S. and Canada. This gave the former a population density (people per square mile) of 20.1 and the latter, 22.2. But by 1985 Latin America claimed 405 million people while the other two nations were at 264 million. Density: 49.4 Latin America vs. 35.4 for the U.S. plus Canada. By the year 2025, Latin America may well have reached 779 million with a density of 95.0. The U.S. plus Canada may then be at 345 million with a density of 46.2.

The place to go Clearly, there will be very little space and many fewer employment opportunities. Obviously, the Hispanic population of the U.S. will continue to grow. It will grow with enormous speed as a result of births to Hispanic mothers already here and legal, as well as from illegal seekers of the "American Dream."

All this translates into dollars. But those dollars will go almost exclusively to those businesses that have demonstrated a true interest in the Hispanic consumer and to those businesses who have communicated their interest in the language understood by these immigrants—their own. Remember that even among Hispanic Americans already here, virtually all of them believe the Spanish language is the aspect of their tradition that is most important to preserve.

We must also keep in mind that "no English spoken" does not necessarily mean no money to spend. The money is there, but they may not know where to spend it. The growth, and even the survival, of many a business will depend on its relationship with the Hispanic community. Let's show these people that we care. Let's speak their language and let them know they are welcome in our places of business.—**Manuel A. Escalante**, general manager, KIWW(FM) Harlingen, Texas

On-the-scene newshound gives KCBS-TV its exclusives

(Continued from page 20)

thing was a live shot. All of television is guilty of this—doing a live shot when it didn't need to be live. Now we only do it if there's a genuine need for it."

But Lopez has covered some major stories in which there was an absolute need to go live. On Oct. 1, 1987 a major earthquake damaged the city of Whittier at 8 a.m. Lopez got to the downtown area by 10 a.m. and discovered "there were no TV reporters anywhere in sight." The live remote truck from L.A. arrived around 11 a.m., and Lopez began reporting on the destruction

"All of television is guilty of this—doing a live shot when it didn't need to be live."

and injuries at that hour.

During his second report, he heard Dan Rather introducing his coverage. "Nobody told me CBS News was doing an insert," Lopez recalled. "I've been on the national news before, but never on a Rather broadcast. Had they told me beforehand, I'd have been terribly nervous." On that day Lopez did seven live reports.

Air disaster. On Aug. 31, 1986, a Sunday, while he was completing his vacation, the Cerritos air disaster occurred, in which a 727 flying from Mexico to L.A. and a private plane collided in midair around noon, with a heavy loss of life. Lopez was called to work, and from 1 p.m. until past 11 p.m. he did around 12 live shots, including one, he says, which was sent via satellite to 100 stations around the nation.

Lopez has covered major fires and other plane disasters, and since he's got a sports background, some sporting events. He admits to liking hard news stories best, and to trying not to let seeing so much car-

nage "bother me too much. It's made me appreciate more what I have." Married, he has a son 11 and a daughter 13. "I'm a sucker for a hardluck story," he admits, adding: "But I know life can be very cruel, and I see it every day. If you let it bother you, you can't do your job. There's a fine line where, if you get involved, you can't do a good job on the story. Sometimes it's real hard."

Having won several local Emmies, Lopez says the hardest story to cover involves "kids who aren't liked" and are brutalized by adults.

Happy ending. One recent story with a happy ending he reported focused on a nine-year-old who saved his four-month-old brother's life by pulling the infant from a bathtub and applying a form of CPR. "That was a ball to do," Lopez said with a wide smile. His reportage on the plight of a home for battered children, which was overcrowded and in need of assistance, years ago resulted in \$7 million being donated by private citizens and a new facility being constructed.

Lopez said the best thing about his job is putting stories on the air which can make people think ... and move them to action.

The object. In 1981, while covering a murder story, Lopez was himself the object of media coverage. He had interviewed William Bonin, accused of murdering 21 children, and during the exclusive meeting, Bonin confessed to the killings. Lopez admitted "it was basically off the record," but he brought the information to the prosecution, which put him on the witness stand. "I took a lot of heat from the media," he admitted, "and it was probably the closest I felt to putting my career on the line. I could not have lived with myself if I hadn't testified. I think the information helped convict him. I felt like a hypocrite by not testifying. You deal with the devil and you don't come out clean. Seven years later people still remember the incident." Bonin is today on death row.—**Eliot Tiegel**

New farm survey gives a boost to WPTY-TV

Steve Barry says he wasn't sure how the research would come out, "But the new Arbitron farm study we commissioned turned out to be a pleasant surprise."

Barry, director of sales for WPTY-TV Memphis, reports that the results "flew in the face of a lot of assumptions too many ag marketers have been making about UHF independents ever since the earlier Doane and Arbitron studies of farm viewing back in 1983. We found a lot has changed over the intervening five years."

Barry recalls that where the 1983 surveys found heavier farm viewing to early and late news on network affiliates, "Our new results turned up an upsurge in watching entertainment on our independent."

The \$1,000 study shows farmers in 16 of the Memphis ADI's heaviest agricultural counties receive WPTY's signal and that farm operators watch WPTY's programs.

Station upgraded. At least one reason for the improvement is that early last year WPTY upgraded facilities. It added a new three-million-watt Comark transmitter and a Harris TWS-30 Wavestar antenna to increase its signal coverage to 7,500 square miles. Barry adds that many area farmers have invested in "state of the art TV sets and antennas that bring them better reception."

The study compared independent 5 to 8 p.m. viewing to news watching on affiliates in the 16 of Memphis' 33 ADI counties that grow the most soybeans and cotton. Barry says these 16 counties account for 75% of all farm production in the ADI.

Steve Barry



Spotlight On...

Harvey Rabinowitz



*Vice president
Medical director
W. B. Doner and Company
Detroit*

Harvey Rabinowitz says W. B. Doner may be the 33rd largest U.S. agency, "But we invest approximately \$30 million of our clients' money in radio. That puts us just below the top 10 agencies when we're ranked by spot radio dollars."

Rabinowitz says Doner makes radio work for its clients by "looking much deeper than just the numbers in the ratings books. We look at each market and look at the relative pulling power of each station in the market, across the full spectrum of formats. And where a station has qualitative information we look at that, too, whether it's from MRI, Simmons, Scarborough or from International Demographics."

He adds that no matter what the client category, "We look at radio from the retailer's point of view because most products reach the consumer through some retail outlet. And the retail point of view is that advertising, whether it's delivered via broadcast or print, is expected to produce store traffic and sales the day after it runs."

Rabinowitz explains that in order to produce next day consumer action, "We match station audiences to each client's best customer and prospect profile in terms of demographics and qualitative audience characteristics. But in doing this we have to keep in mind that the characteristics of the clientele of even the same retail outlet do not necessarily remain uniform. It depends on what item the outlet happens to be featuring at the time. On any one given day, for instance, an auto dealer may be pushing top-of-the-line, but next week it may be his economy model. His target customer differs in each case. A food store may be featuring its gourmet specialties one day, and next week the big offer may be free cookie cards for the kids. A drug store chain may be advertising premium photo processing today, but tomorrow it may want to talk about its private-label economy generic line."

He says that when it gets down to selecting individual stations, "We consider the pulling power of each appropriate format and of each station's personalities, and also the credibility of the personalities. We listen to station tapes. We make sure there's nothing that some people might consider objectionable. Only after all this are we ready to start negotiating."

In a word...
Quality



The First Name In Radio

WBZ, Boston WINS, New York KYW, Philadelphia KDKA, Pittsburgh
WMAQ, Chicago KODA, Houston KQZY, Dallas/Fort Worth
KQXT, San Antonio KEZW (AM) and KOSI, Denver KMEO-AM-FM, Phoenix
KAER and KFBK (AM), Sacramento KFVB, Los Angeles KJQY, San Diego

Westinghouse Broadcasting Company



Peg Kelly has been named station manager of Westwood One's WYNY(FM) New York. She had previously been vice president, general manager of WNBC New York, and before joining NBC in 1981 she had been an account executive for WCBS-FM New York.

Mike Mougey is the new national sales manager at KXTV(TV) Sacramento. He joins the Belo station from the sales force at Blair Television in San Francisco.

Robert Fein has joined WYOU-TV Scranton-Wilkes-Barre as national sales manager. He moves in from the sales staff of WTVT-TV Tam-

pa-St. Petersburg, and before that he had been an account executive with the Boston office of Blair Television.



Leon C. Collins has been selected as new general manager of the Pacifica Foundation's WPFW(FM) Washington. He was executive producer for WSUR-TV Ponce, Puerto Rico.

John Vera has been appointed to the new post of national sales manager for KSMS-TV Salinas-Monterey, Calif. He had been general manager of KCBA-TV Salinas and before that he had been with KMST-TV Monterey.

Representatives



Michael Chico has been named director, new business in the marketing department of Blair Television and is also responsible for generating new revenue for spot TV through use of unwired networks and vendor support. He joined Blair last year as marketing manager, moving in from Capital Cities/ABC National Television in New York.

Julie Ballard has joined CBS Television Stations National Spot Sales as manager of the Los Angeles office. She had been vice president/sales manager with MMT Sales there.

Pat Haggerty has been promoted to director of marketing services for TeleRep's Television Marketing Associates. She originally joined TeleRep as a research analyst and transferred to the TMA staff in 1980.

Doris Vignapiano has been named director of training for Petry, Inc., in charge of supervising all sales assistant trainees. She joined Petry in 1973 as a sales assistant and has most recently been a group manager assistant with Petry National's Blue Team. In her new training post she reports to **Marie Imbesi-Chieca**, vice president, director of personnel.

A real gabber for WCAU



Former Philadelphia mayor and tough law-and-order cop Frank Rizzo is on the right. He worked his way up to Police commissioner before becoming a two term mayor, and his third career as talk-show host on CBS-owned news-talk radio station WCAU Philadelphia kicked off Nov. 9, 4-6 p.m. daily, Monday-Friday. WCAU vice president, general manager Allan Serxner, c., reports his sales staff "has received nothing but positive comments" concerning Rizzo joining his station. "His show has generated commercial interest right from the moment it was announced we had signed our former mayor." At l., is Greg Tantum, WCAU's program director.

Sullivan honored

Joe Sullivan & Associates, which conducts senior level executive search and recruitment assignments in the radio and TV industry, has been named one of the 50 leading executive recruitment firms in the U.S. by *Executive Recruiter News*, monthly newsletter.

Wall Street Report

A mixed bag of outlooks for broadcast, cable and syndication stocks

Wall Street analysts seem generally bullish about broadcast, cable and distribution companies that have released quarterly reports in recent days.

According to Merrill Lynch, Knight-Ridder Inc. "remains an attractive, relatively low-risk investment with an upside potential of \$50 a share and a downside risk of \$40 a share." Earnings during the next several quarters, the analyst said, will be affected by the resolution of situations pertaining to *The Detroit Free Press* and *The Miami Herald* and the purchase of 15% of Storer Cable by KRI in a partnership with Telecommunications Inc.

Merrill Lynch is estimating that KRI's 1989 revenues will rise 3.3% to nearly \$2.3 billion, with net operating income climbing 9.2% to \$322 million. However, the analyst concedes its projections "could prove optimistic and reported earnings could be lower."

Times-Mirror potential

As for Times-Mirror Co., Merrill Lynch said that, although its stock "has lagged the market by about 20% since the beginning of the year," it should have a downside in the \$30 a share range with an upside potential of \$38 to \$40 a share—perhaps even \$45 or more in a year's time.

Primarily a newspaper publisher, TMC's "second most valuable asset (some might say the most valuable) is its cable operation" with 970,000 subscriber homes. "Cable is a cash flow business and does not make a substantial contribution to reported earnings," the analyst observes.

Third quarter results were "as expected—dismal," Merrill Lynch contends. Broadcast results "have been a real disaster with operating profits off 29% through the first nine months of the year," with its stations in Dallas and Austin "suffering from weak markets" and St. Louis' not competitive. But since broadcasting contributed 8% to total operating income this year versus 18% in 1982, that segment is "no longer a very critical element in TMC," which may "ultimately decide to exit broadcast television," Merrill Lynch notes.

King World reigns

On the production/syndication end, King World Productions reported record revenues and earnings for the fiscal year ending Aug. 31, with revenues up 16% to nearly \$280 million and net income up 79% to nearly \$61 million. For the fourth quarter alone, revenues dipped 1% while net income grew 8%.

Citing strong station and viewer acceptance of such syndicated hits as *Wheel of Fortune*, *Jeopardy* and *The Oprah Winfrey Show* and some station commitments for the next four to five years, King World predicted "strong future prospects."

Because of KW's aggressive development of new shows like *Inside Edition* and a strong barter outlook in a generally weak TV marketplace, Oppenheimer & Co. is among those recommending King World stock. One downer is that Merv Griffin, busy on a new game show called *Winfall*, for daytime network TV, may not have time to develop *Monopoly* for King World. While the company could develop the show internally, Oppenheimer says, "It appears this approach would be less likely to succeed."

In barter sales, King World spots were 98% sold for the fourth quarter of '88, and Oppenheimer says King World expects to do "even better in the first nine months of 1989."

Multimedia attractive

Multimedia Inc. boosted its revenues by 5% to nearly \$108 million for the third quarter as net earnings dipped to almost \$4,500,000. The broadcast division's revenues decreased slightly to \$33,439,000 while cable rose 12% to \$25,375,000 and the entertainment division grew 14% to \$15,874,000. Broadcast declined since WZTV(TV) Nashville was sold.

Goldman, Sachs & Co. sees Multimedia as an attractive stock since its TV affiliates have been outpacing the industry average in terms of ad sales growth and since its syndication arm is doing well with shows like Phil Donahue's.

Record for Jacor

Jacor Communications boasted record third quarter broadcast revenues, up 53.1% to \$20,912,000 and posted a \$124,000 net profit, versus a \$525,000 net loss a year earlier. For the nine-month span, Jacor enjoyed a 62.8% surge to \$54,693,000 in revenues.

However, the broadcaster notched a larger net loss for this year, \$3,424,000 versus \$2,702,000 a year ago "because of larger noncash charges and interest expense associated with recent acquisitions," such as two Tampa radio outlets and the station representation firm Eastman Radio.

Terry Jacobs, Jacor's chairman, predicts, "We look forward to these [favorable] patterns continuing through the remainder of the year."

Gains at Viacom

Viacom Inc. scored boosts in revenues and earnings from each of its operating segments for the third quarter and nine months.

Revenues rose 21% to \$311,600,000 in the third quarter, lifted by a 38% revenue hike by Viacom Entertainment and its domestic off-net work syndication of *The Cosby Show*.

MTV Networks, Showtime Networks and its other cable operations also sported sizeable revenue growth during the quarter as broadcasting boosted revenues 10%.

Viacom tallied a net loss of nearly \$40 million for the quarter, up from \$37,500,000, because "corporate overhead increased 123%, principally because of a noncash charge of \$11,500,000 for the third quarter of 1988, relating to a longterm deferred incentive compensation plan."

FEEDBACK

What is your feeling about the reverse compensation agreement between ABC and WPBF-TV in West Palm Beach, Fla.? Do you think this could lead to a change in the traditional network compensation arrangements?



"I was surprised... I have talked with some at ABC and been assured ABC's real motivation was not compensation per se but to gain the best position [in that market] longterm... I don't like the precedent it sets. I hope it doesn't portend a change."

*David Lane
President-general manager
WFAA-TV Dallas
(Chairman, ABC-TV affiliates
board)*



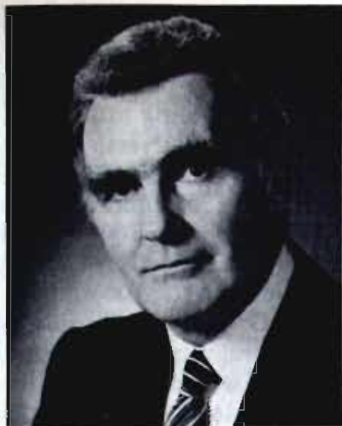
"I don't think it'll be 'reverse compensation.' The station may make an initial upfront payment but I don't think they'll pay an ongoing fee. I don't think it's going to be precedent-setting or become a trend in our business. [ABC wanted the affiliate because its owner is] a good company that runs a good CBS affiliate in Tallahassee. This is an interesting idea for markets where there are not a lot of alternatives. But even now network comp varies according to conditions market to market."

*G. William Ryan
President
WPLG-TV Miami
(Secretary, ABC-TV affiliates
board)*



"As I've been saying all along, Palm Beach is a unique situation since we didn't have an affiliate there. Over the past two years we started talking about reducing compensation a little here and there, so there's no news there. There has been a fundamental change in the business, and the networks don't have the profitability they used to. I think there are going to be continuing changes. I don't know how many situations like Palm Beach we're going to see, but where we have strong affiliates, they have nothing to worry about. Where they're marginal or poor, we may examine the situation as it arises."

*George Newi
Vice president of affiliate
relations
ABC-TV*



"I think in light of all the new competitive realities that both the networks and the affiliates should resist altering the ongoing relationship that has generated so much success. I believe it's impossible for the networks to benefit at the expense of the stations and vice versa."

*John McCarty
President
Times Mirror Broadcasting
Greenwich, Conn.*



"We had the opportunity six months ago to sell an affiliation in a market bigger than West Palm Beach. The station offered us a seven-figure amount, but we turned it down and decided to stick with our current affiliate since they were making positive changes and we wanted to give them an opportunity [to improve]. Though ABC was the first to sign such an agreement, as far as I know we were the first to receive such an offer, a bona fide offer. . . Every market is unique. It'll depend on the marketplace. The cost of production is going up. The networks have traditionally footed the bill [for entertainment, news and sports programming]. The question is how much is it worth to have an affiliation versus how much is it worth to be an independent. The marketplace could force a change where some independents might say it costs a lot to program this station [but it might be well worth paying for an affiliation]. There's change in the wind. That was the theme of our last affiliates' convention."

*Pierson Mapes
President
NBC-TV*



"It's intriguing and interesting. This is just one more startling example of how our business is changing. . . on both sides. Business is being done in nontraditional ways. [ABC's approach in West Palm Beach] is not necessarily applicable in every market, however."

*Tony Malara
President
CBS affiliate relations division*



"I'd be very saddened to see that policy start. I don't know enough about it to talk further."

*Clyde Payne
Vice president and general manager
WBKO-TV Bowling Green, Ky.
(Vice-chairman, ABC-TV affiliates board)*



"There is a possibility there might be. On the other hand, it might be an isolated situation. I can't really make any other comment on it. It's a private agreement between the network and another affiliate."

*John Behnke
President/CEO
Fisher Broadcasting Inc.
Seattle
(Immediate past chairman,
ABC-TV affiliates board)*

Long-term forecast *(from page 58)*

tion in program demand. The result will be slower increase in program costs.

With basic cable viewing growing faster than pay cable during the '80s, basic cable subscription revenues will grow faster than pay cable subscription revenues in the near term ('88-91), with the former rising 53.6% and the latter, 16.7%. By 1991, total subscription revenues will reach \$12.8 billion.

During the same period cable ad revenues will rise as follows: National revenues will climb from \$865 million to \$1,650 million, while local revenues will rise from \$215 million to \$450 million. That's equivalent to increases of 90.8% and 109.3%, respectively.

With cable construction having

begun in several large cities, including New York, WG sees a speedup in penetration during the '87-91 period. The forecast is for penetration to rise from 50% in '87 to 57% in '91.

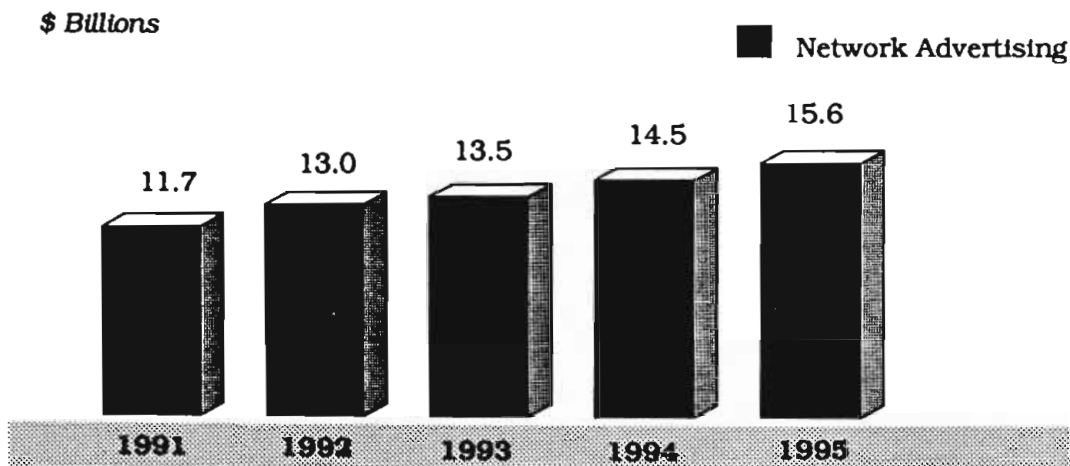
In peering at the long-term ('91-95), WG sees cable construction slowing in the '90s after the current wave of cable construction is completed. Household penetration will rise from 57% to only 60%. This conservative forecast, explains WG, "is based on the experience of potential cable operators facing unusual time delays in gaining franchise rights in urban areas. Thus, the anticipated growth in cable will take longer than many had originally expected several years ago."

Hence, subscription expenditures will climb only 25.6% for basic cable and 9.5% for pay cable, with the total in '95 coming to \$15.4 billion. As for cable advertising, national spending will rise 63.6% between '91 and '95, climbing from \$1,650 million to \$2,700 million, while local will rise 55.6%, going from \$450 million to \$700 million.

While WG sees the supply of syndicated programming continuing to grow, it will at the same time lead to a slowdown in syndication fees as the demand side slows. The consulting firm projects fees totaling \$2.2 billion by '91, up from \$1.5 billion in '87. That's a growth rate of just under 10%. However, during the '83-87 period, fees grew at better than a 14% annual rate.

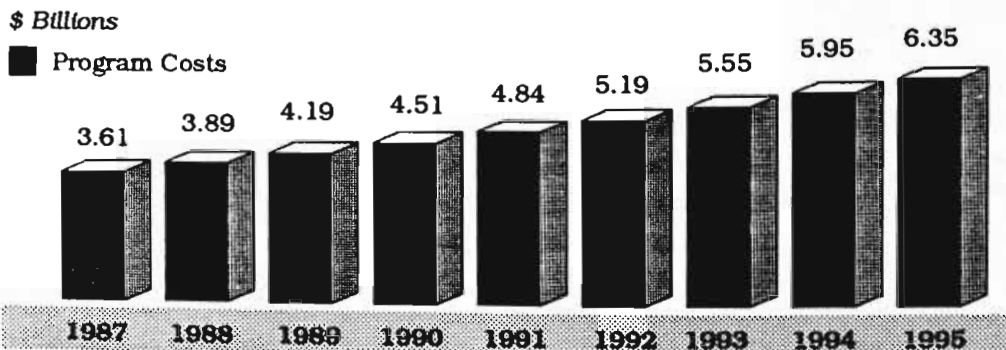
The slowdown in syndication fees will continue in the '91-95 pe-

Network Advertising, 1991-95



Source: Wilkofsky Gruen

Network Entertainment Program Costs



Source: Wilkofsky Gruen

riod, when growth will average less than 8% annually, says WG. Fees will rise from \$2.18 billion to \$2.94 billion.

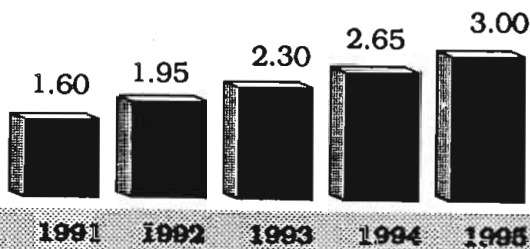
But barter syndication advertising will expand significantly, WG predicts. With the slowdown in syndication fees, barter represents an opportunity for distributors, it is held. The consulting firm forecasts a more than doubling of barter syndication revenues between '87 and '91, rising from \$700 million to \$1.6 billion.

The growth in the time available for barter will ease in the '90s, says WG, "as the relationship between the cash outlay and the barter component of program licensing settles into an equilibrium." But barter syndication ad revenue will remain strong. WG sees such revenues rising from \$1.6 billion in '91 to \$3.0 billion in '95.—**Al Jaffe**

Barter Syndication 1991-1995

\$ Billions

■ Barter Syndication

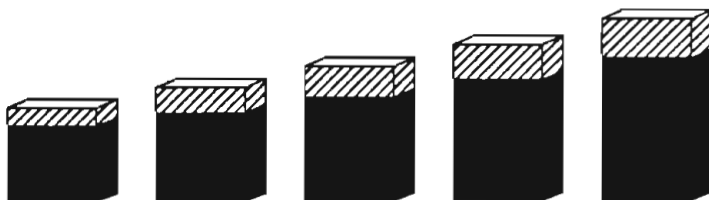


Source: Wilkofsky Gruen

Cable Advertising Expenditures 1987-1991

\$ Millions

▨ Local
■ National

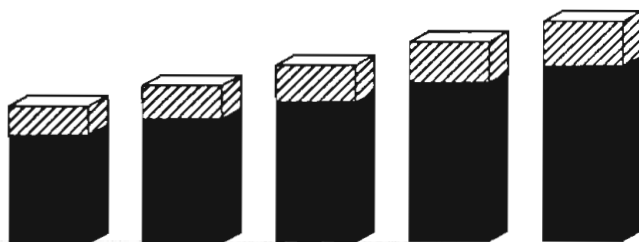


Source: Wilkofsky Gruen

Cable Advertising Expenditures 1991-1995

\$ Millions

▨ Local
■ National



Source: Wilkofsky Gruen

Reporting from Hollywood

Hispanic challenge to renewals of three Los Angeles TV stations

License renewals for three Los Angeles TV stations—independents KCOP and KTTV and public broadcaster KCET—have been challenged by Hispanic organizations.

The National Hispanic Media Coalition cites what it calls dismal hiring and advancement records at

KCOP and KCET in its filing with the FCC. A spinoff group of the coalition, Rainbow Broadcasting Inc., filed against KTTV, citing the same reasons. Station executives disclaim the allegations that they have not been sympathetic to Hispanic requests for more minority hiring and promotions on both

staff and management levels.

Media man: for the fourth time in six years, L.A. newsman Warren Wilson participated in the capture of murder suspects. The **KTLA(TV)** reporter recently was contacted by the mother of a male suspect in the shooting death of an L.A. police officer, flew to Las Vegas and drove back with the man and his girlfriend, also accused in participating in the incident. Police officials arrested the two on-camera at the station, and the incident was the lead, 18-minute story on the station's 10 p.m. news. It also made

the marketplace

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the front page of *The Los Angeles Times* as well as other local newscasts. Wilson's first two assists occurred while he was with KNBC-TV Los Angeles, and his third was last April. He's been with KTLA three years.

Another strike? Nov. 15 is when contracts expire between the **American Federation of TV & Radio Artists** and 37 different local and network radio and TV organizations. The L.A. chapter has already voted for a strike. Meanwhile, it's business as usual in Dod-

gertown after the Teamsters accepted a compromise deal with Hollywood production companies after 25 days of being on strike.

Westwood buy: **Westwood One** has made its first L.A. radio station buy, KIQQ-FM, from Outlet Communications for \$56 million. It's the sixth radio station to be sold in L.A. this year.

TV entries: Three new production firms have joined the L.A. community: **Ventura Entertainment Group**, which plans a variety

of film deals for TV and movies; **Cannon Films' Cannon Entertainment, Inc.**, which will market, promote and advertise *D.C. Follies*, the Sid and Marty Krofft half-hour syndicated comedy; and **Ascot Entertainment**, which makes horror films like *Halloween* and *A Nightmare on Elm St.* and has formed Ascot Syndication Group to acquire and distribute product.

On camera: **KCOP(TV) Los Angeles** reporter Saida Rodriguez has added *Falcon Crest* to the TV series where she plays a newscaster.

the marketplace

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In the Picture

Carol Ramos



Reporter and anchor for WBBM Newsradio Chicago describes work of new Chicago Association of Hispanic Journalists in "educating media management" and in inspiring high school youngsters to shoot for news careers.

Radio reporter heads group working for more media jobs for Hispanic journalists

We caught up with a very busy Carol Ramos during a rare breather between news assignments. Most of the time Ramos is a reporter and anchor for CBS-owned WBBM(AM) Chicago. Now she's also been elected president of the recently-formed Chicago Association of Hispanic Journalists, a group that works to advance Hispanic job opportunities in the media and encourage ambitious Latino high schoolers to shoot for careers in journalism.

Ramos' regular beats are Chicago's Municipal Housing Authority and Transit Authority. But much of the time her job is the kind of general assignments most reporters get in any big city newsroom, chasing down a story as soon as the desk gets wind of it, whatever it may be.

The day we reached her, she was just back from a meeting of one of suburban Chicago's town boards to cover a fight between pro- and anti-gun-control forces over restricting sale of firearms. It was one of many nearby towns where the question was suddenly pushed to the front burner again, following this summer's tragedy when a woman with a gun holed up in a Winnetka school room, holding a whole classroom full of kids hostage after shooting one eight-year old, wounding six other victims, and finally killing herself.

Colleagues at WBBM say Ramos has worked long and hard to help organize CAHJ as a new Chicago chapter of the National Association of Hispanic Journalists, bringing together fellow reporters and editors like *The Chicago Tribune's* Manuel Galvan, past president of the national association; Rafael Suarez and Ysabel Doron at NBC's WMAQ-TV; and Jim Martinez and Sue Ontiveros of the *Chicago Sun-Times*.

Educating management

And while CAHJ does work with aspiring high school youngsters, Ramos notes that the association "has other people to educate besides our kids. There's our managements at the stations, the newspapers and the magazines. They keep saying they'd like to hire

more Hispanics 'if only we could find some competent people.' Well, here's our whole association—40 or 50 very competent professional journalists and technicians. They can have their choice of very qualified people with a variety of national origins, of Mexican, Puerto Rican, Cuban, Central or South American heritages. We're all right here in Chicago, right now, already trained, already experienced, many of us with some very impressive resumes."

Asked about the news content of Chicago's media, Ramos cautions, "I wouldn't want anyone to get the idea our group thinks of itself as some kind of self-appointed watchdog of the press. But we do point out to our news directors and editors that there's more news in our Hispanic community here than gangs, street-fighting and political fighting over bilingual education."

She concedes that stories "about the thousands of kids who *do* stay in school and who *do* do their homework every night don't make big ratings and don't sell newspapers. But there are plenty of positive aspects that are news. For just one example, in the City of Chicago alone, Latinos make up 17 or 18% of the population. That's enough to be the swing vote that could decide the next mayoral election here. We're young. We have a median age of 20. We have more kids. So by 1993, we're very likely to reach 25% of Chicago's population."

National significance

She also points out that on the national level, Chicago is the biggest city in Illinois, "one of the states with a decisive number of electoral votes. So there's an important news story in the fact that the biggest voter registration drive in this city's history has just been completed in our community. Governor Dukakis thought our vote was important enough to speak to Latino crowds in Spanish. Mr. Bush thought it was important enough to trot out his grandchildren—the ones he likes to call his 'little brown ones.'"

Ramos describes CAHJ's work with the high schools as "seeking out kids with ambition and an interest in communications." She adds that this includes "behind the scenes, in the control rooms and composing rooms, editing the tape as well as talking into the mikes and being in front of the camera and chasing firetrucks and politicians. It's also showing these kids, 'Here we are, the role models. If we could make it, you can make it, too if you keep studying and keep fighting for a better life for yourself.'"

"We go to the schools and tell them this. We encourage them to try for summer internships. We invite them to spend a day with us, go out with us on stories, watch what we do out on assignment and back in the newsroom, and watch what the behind-the-scenes engineers and technicians do. We don't make it a requirement of CAHJ membership that every member does this. Not every member is in a position to take a youngster in tow. But we do encourage those who can to do it and help get a kid off the street and give him a push in the right direction. And we're also trying to get a scholarship fund started for those youngsters who do have the potential to make it in this business."

Washington Report

Not much good news as Congress adjourns; not much bad, either

True to its promise earlier in the year, Congress held the broadcast industry hostage to the dispute over the fairness doctrine and declined to pass any major legislation that the industry wanted. As part of that same fight, it also refused to give the FCC the two replacement commissioners it and the Reagan administration wanted.

But the ban on broadcast activity was not total, and a slew of measures were passed in the days before Congress quit its 100th term for the campaign trail. The industry didn't consider the legislation too onerous and, in fact, got some of what it wanted.

On the plus side was approval of changes in the FCC ban on advertising lotteries and other games of chance, legal or otherwise. The lifting of the ban is to take place in mid-1990. It will allow advertising and references to such things as bingo, raffles, and retail sweepstakes if they are legal and don't violate individual state laws.

The waning days also saw U.S. adherence to the 102-year-old Berne Copyright Convention, which is to give the nation more muscle in complaining about international piracy of U.S. copyrighted works. The legislation passed without the "moral rights" provision that some stations had feared would give their newspeople unwarranted control over the editing process.

Cable obscenity

On the negative side, at least for the cable industry, was the last-minute action on the omnibus drug bill that contained a section that bars "cable television obscenity."

The relevant section states: "Whosoever knowingly utters any obscene language or distributes any obscene matter by means of cable television or subscription services on television shall be punished by imprisonment for not more than two years or by a fine. . . ."

Over-the-air broadcasters already were covered by the ban under FCC regulations, but earlier, Sen. Jesse Helms (R-S.C.) won approval of a change in the FCC's indecency rules, strengthened earlier this year. Helms, in effect, eliminated the "safe harbor" for indecent programming that the FCC had allowed during hours when children do not normally watch.

The drug bill did pass, however, without including one provision that broadcasters fought against successfully. It would have required them to open their airwaves to government-sponsored antidrug messages at their lowest unit rate, much as they now have to provide access to political candidates.

Another last-minute measure was legislation to make changes in the Tax Reform Act of 1986. At one time a proposal was alive to limit the deductions that businesses could take on advertising, but that provision did not make it into the final bill.

Time ran out on Congress before it could do much with the issue of the amount and type of programming available to satellite home dish owners. What did pass on the penultimate day of the 100th Congress was legislation eliminating Copyright Act restrictions on the receipt of the signals of independent TV station signals and certain signals of network affiliates.

Back on the final day of Congress, it approved an authorization bill for the Corporation for Public Broadcasting that gives a shot in the arm to independent program producers who had complained of being shut out of the mill for noncommercial programming. Legislation approved creates a program fund for those independent productions.

A few days earlier, Congress worked out a compromise between warring Senate and House factions and approved a measure that would have limited the amount of commercial time that could be included in children's programming. Twelve minutes per hour was to be the limit on weekdays and 10.5 minutes per hour on weekends. What stations did in children's programming also was to be considered by the FCC at renewal time. But President Reagan vetoed the bill.

Broadcasters considered the children's television legislation a positive action because it was a watered-down version of other legislation they had considered much more onerous.

Both industries on defensive

On the other side of the coin, broadcaster and cable interests had begun the congressional term with a defensive posture—cable because its new position of industry dominance has made it the target of snipers, and broadcasters because they feared the retaliatory efforts of members of Congress angry over the broadcaster-supported repeal of the fairness doctrine by the FCC. Thus, they count as victories the fact that a lot of proposed legislation did not pass.

This past Congress went through another end-of-session marathon-legislating exercise last Christmas when it acted in a slapdash fashion on a myriad of important legislative efforts.

One of those efforts, which never got seriously revived through the second congressional session held this year, was the effort by Sen. Ernest Hollings (D-S.C.) to impose a transfer tax on the sale of broadcast properties. It was his angry response to the failure of Congress to prevail on the fairness doctrine issue.

Other victories by default include the failure of legislation that would do something about the level of violence on TV, reimpose the three-year holding rule on station sales, strengthen equal employment opportunity rules, require airlines to make certain consumer disclosures in their commercials, and impose limits on the creation of TV Marti, the government-sponsored programming aimed at Cuba, which broadcasters fear will lead to disrupting retaliation by the Cubans.

By the same token, the fairness doctrine squabble spelled defeat for broadcasters on some issues that they had wanted congressional action on: restoration of must-carry, a resolution of the satellite scrambling issue, help with high-definition television, and changes in the process of renewal broadcasting licenses.—Howard Fields



Definitely low browse. *This is a photo from the set of "Geraldo," where a riot broke out during the taping of the show featuring hate groups that Geraldo Rivera had brought together from all walks of life. Fortunately there was no one to beat up on but each other. Unfortunately, Rivera took either a left hook or a chair to the nose and was injured.*

British may muzzle CNN

There is no such thing as the First Amendment in the U.K., so the British Government—without even so much as a by your leave—has banned on-camera interviews with any members of the Irish Republican Party by either the BBC or the ITV stations. While the upper crust of the BBC doesn't seem to be fighting the gag order as vigorously as some may like, 250 members of the BBC's news union walked off their jobs for 24 hours on Nov. 10 to protest the government order.

So far the British government has been silent about foreign broadcasters conducting such interviews and then showing them to the British people. Cable News Network, for example, is available on U.K. cable channels.

CNN says it hasn't heard yet from the British Cable Authority if the rules apply to the service's international feed. Question: Suppose an IRA official was interviewed by CNN in Atlanta; could that interview be carried on CNN's international feed to U.K. cable systems? "We

just don't know," said a CNN spokesman. "We're operating in a never-never land."

Attorney General Wiley?

Richard E. Wiley, former chairman of the FCC and now a prosperous and highly influential Washington attorney, is considered a candidate for attorney general in the Bush Administration.

Wiley has let it be known that being AG is really the only job in the administration in which he's interested. One of Wiley's partners, Fred Fielding, was a counselor to President Reagan.

The question is, however, does Wiley want the job badly enough to take a monstrous pay cut? After a

Paper tigers

Television network types have been complaining for years that newspapers pay more attention to network broadcast journalism (namely how bad it is) while giving almost no space to newspaper criticism.

Now up steps CBS correspondent Bernard Goldberg with these comments in the Op-ed page of *The New York Times*: "Newspapers whose editors don't know where the state capital is



Bernard Goldberg

have TV critics. One of the criteria for becoming a TV critic... is that you have to

look down your nose at commercial television, which makes viewing very difficult...

"Why don't newspapers have regular columns by 'newspaper critics'... Why are critics right on top of things when it comes to criticizing TV and so silent when it comes to looking at the workings of their own—and their competitors—newspapers?"

"Obviously, television is simply too big and important to function properly without criticism. But so are newspapers. So let those editors and publishers hire some Renaissance men and women to monitor themselves. The public deserves it and newspapers will be better for it—if they don't suffocate first."

They said it

"I've been trying to create news for the last three weeks and I'm not doing a very good job at it. Put me on the air."

Dan Quayle, just a few days before the general election.

"We've come a long way since *Kukla, Fran & Ollie*." *WNBC-TV New York anchor Chuck Scarborough commenting about the "Geraldo" brawl.*

"There may be journalists who believe that the heavy emphasis given to the predictions of a Bush victory has had no bandwagon effect; I just don't know any. That is why if Mr. Bush wins, we can't just say we told you so. We will have to ask ourselves if we told you so too loud, too often, too early."

"N.Y. Times" columnist A.M. Rosenthal

"It had every element of excellence that a programmer would want in a television show."

Kim LeMasters, president of CBS Entertainment, announcing the cancellation of "Frank's Place."



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"Waves Of The Future," a general session on HDTV, produced by Joel Chaseman, Chairman, Post Newsweek stations.

"Writers," a general session to be moderated by Dick Cavett, including Bruce Paltrow, Steven Bochco, John Marcus, Stephen J. Cannell, and Fay Kanin.

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