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QUOTAS/31

Television/Radio Age

HOME RUN

Baseball stations
report healthy
TV ad sales/25

PASSIVE 'METER'

Sample householder
for single source
tells all/28

HISPANIC MARKET

No longer
'melting pot,'
but 'paella bowl'/A1

Indiana University

July 23 1989

July 24, 1989 • \$3.50

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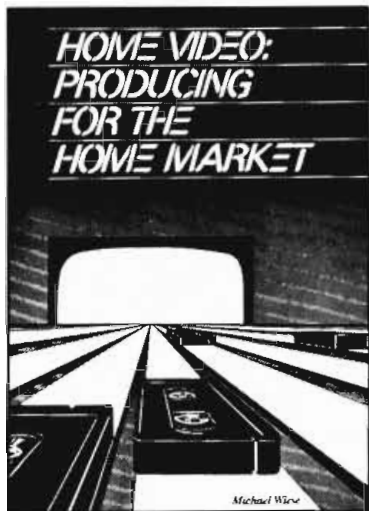
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Television/Radio Age

July 24, 1989

Volume XXXVI, No. 26

TV ratings, ad sales reported healthy,
helped by close competition between teams

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Publisher's Letter

Rapid growth of Hispanic population teaches advertisers a new language

With the rapid growth of the U.S. Hispanic population, the country is becoming less of a melting pot and more a "paella bowl," the latter being a Spanish-derived dish where the various elements are not homogeneous but quite separate. As our special Hispanic market study in this issue demonstrates, the 19-23 million Hispanics within our borders are as diverse as their Mexican, Puerto Rican, Cuban—and, more recently, Central and South American origins.

Strategy Research Corp. puts the U.S. Hispanic figure at slightly over 23 million, saying this represents a net change of more than 9 million—a growth of 62.1% between 1980 and 1989. Percentagewise, Hispanics are reported to represent 23.7% of our population vs. 14.6% in 1980. The amnesty of May 1988 for illegal immigrants has had a particularly significant effect on the Los Angeles and Houston markets. Los Angeles, by anybody's figures, remains the largest U.S. Hispanic market and the fastest growing. New York is well in second place. But Miami, San Francisco, Chicago and Houston all are closer calls, each with Hispanic populations approaching a million.

Hispanic "rooting." Experts like SRC president Richard Tobin point out that, as the Hispanic population has built a critical mass, it is better able to maintain its ethnic identity—known as "rooting"—rather than having to take the previous stance of having to "go along to get along." SRC's research indicates that 13% of the Hispanic population is "totally acculturated," 49% is "partially acculturated" and 38% is "unacculturated."

Both the "paella bowl" and "rooting" aspects are having their effects on Spanish-language radio and TV. Definitions vary as to what constitutes an Hispanic radio station, but more than 200 are estimated to be operating in the U.S., a few of them now FM for the first time. What's especially significant is that they have a wider variety of formats, even within a given market, than ever before.

Hispanic TV has not only taken hold but has become highly competitive, with both the Univision and Telemundo networks working to maximize coverage. Univision reports reaching 85% of total U.S. Hispanics so far, and Telemundo says its coverage will be 75% when its newest owned-and-operated station goes on the air in San Antonio next month.

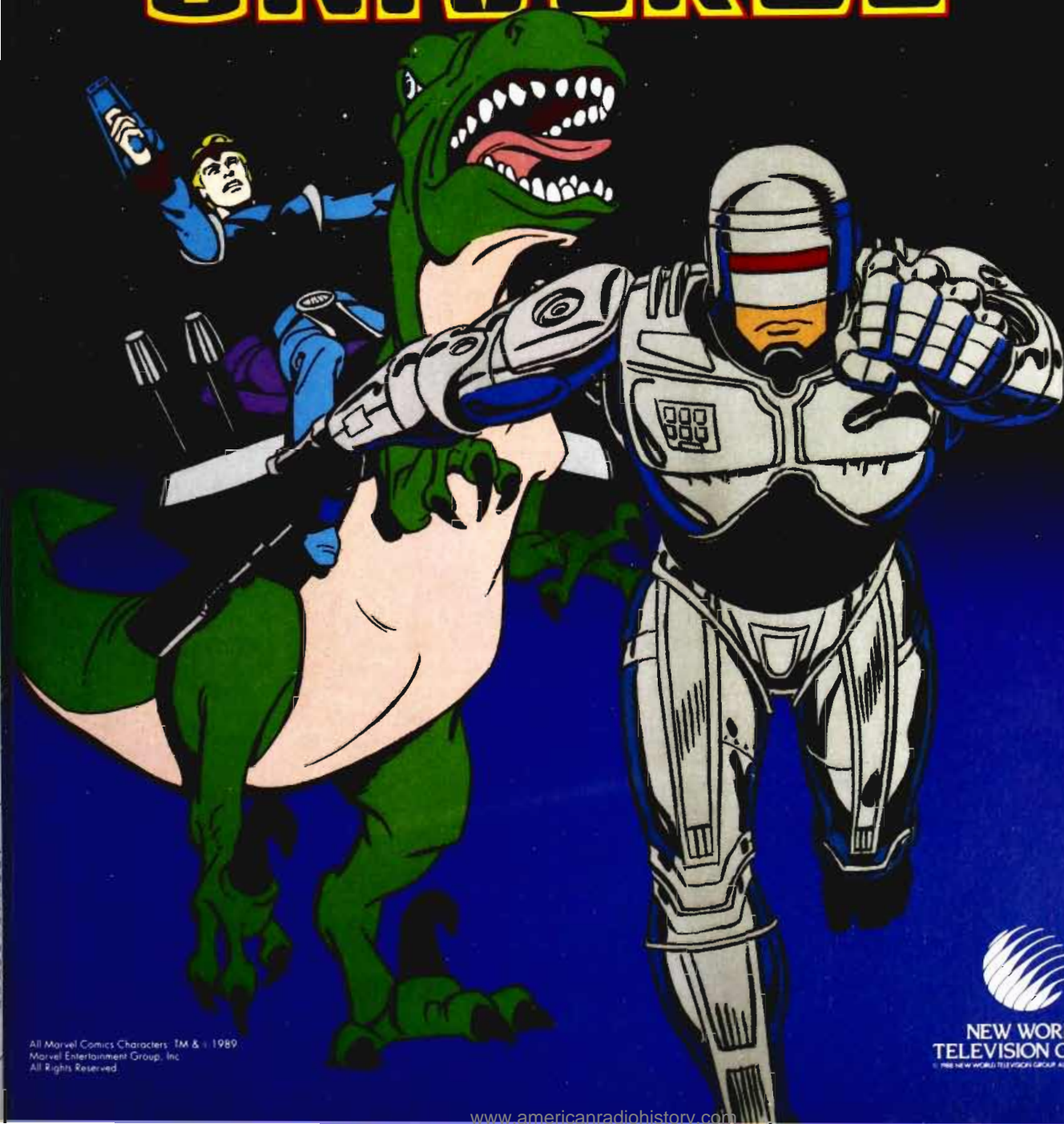
Meanwhile, our conversations with stations indicate their advertising is less and less confined to products and services aimed specifically at the Hispanic market. General market advertisers are coming on steadily, and many of the stations report more upscale advertisers, such as home electronics and automobile dealerships ranging from the Japanese makes to Cadillac.

Advertisers are learning that when they have something to say, it also pays to say it in Spanish.



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Markey: Radio license renewal reform first; TV considered

Radio may be the Capitol Hill focus this year on reforming the license renewal process, but Rep. Ed Markey (D-Mass.), chairman of the House Telecommunications Subcommittee, says he is willing to work with television people to work on their problem as well.

In an interview with TV/RADIO AGE, Markey noted that legislation had been introduced to get at some of the abuses in the license renewal process but that it is aimed only at radio stations. Broadcasters have pushed a radio-only bill because past attempts to include TV stations in the reform effort got bogged down on other issues.

The Telecommunications chairman also believes broadcasters and cable operators have little to worry about from the telephone companies in the near future. Telcos are preoccupied with too many other matters to make any attempts to get into the TV business, he says.

Working together. At the June meeting of the National Association of Broadcasters radio board of directors, Markey told them, he says, "that at any point in the next month or so that if they want to bring in people and sit down, we'll just begin to work together towards the goal of finding the language that will accomplish that goal and I'll push it for them to solve the problem."

He leaves no doubt he sympathizes with their problem of "extortion, these stickup artists that are out there trying to use the renewal process as a means of extracting tribute from legitimate broadcasters." Beyond the abuse process he offered to work on the problems associated with AM radio and to address "the broader issues of license reform."

Markey will serve as an interlocutor, he says, but "it will have to go through a very logical, systematic process if we are ever to reach anything." He expects a bipartisan effort on the abuse-of-process problem, he says. Unless some magical

fix is offered that would include TV, Markey would rather confine the reform effort to the radio world. "I could put more forward much more quickly on that piece, because I have total agreement with them on the subject."

As for TV, he says, language similar to that being considered to correct the abuses in radio "might be appropriate, but I would have to look at it." Another element to be considered, he says, is the makeup of the new FCC—"who the commission is and what their attitudes are."

Telco lobbying. Speaking on the telco matter, Markey expects the telephone industry to confine its lobbying efforts through next year on trying to get changes made in the modified final judgment, which limits the industry's entry into other information and video services.

Leaving no doubt on states abiding by Copyright Act

Having mulled over the U.S. Supreme Court's decision upholding the right of Congress to abrogate the 11th Amendment to the Constitution, a congressional subcommittee has fashioned legislation to make certain there are no doubts about its intentions.

States and their entities, primarily state-run universities, had claimed before the court decision that they were immune from suit in federal court for any violations they may make of copyright laws. That would have meant they could copy radio and television shows with impunity and not get permission, pay royalties, or otherwise follow the requirements of the copyright law.

In a tangentially related case, however, the court said congress could, through rights it has under the first article of the Constitution, abrogate those rights of the states but only if it expresses clearly in legislation that that is its intent.

New Time magazine looks like a 'go'

The debut of *Entertainment Weekly*, which Time Inc. plans to launch in February, still seems assured in the wake of the Delaware Chancery Court decision approving Time's plan to acquire Warner Communications and rejecting Paramount Communications' effort to block it. A stay won by Paramount, granted by Chancellor William Allen, will permit the Delaware Supreme Court to rule on the matter, which will be heard today (July 24).

One financial analyst, Dennis McAlpine, senior vice president at Oppenheimer, feels the legal maneuvering won't affect plans for *Entertainment Weekly*, which will cover and review TV, movies, video music and books. He points out that there have been no plans to sell any Time Inc. magazines under the merger plan, although some cable systems may go on the market.

Agency media directors are cautiously positive about the proposed magazine. One of the more supportive comments comes from Nancy Smith, senior vice president and director of media services at Young & Rubicam. "There's a need for this," she says. "There's so many more media available, so much more TV programming." She sees it appealing to people "heavy into media of all sorts."

Arnold Semsky, executive vice president, media and programming services at BBDO, notes that certain magazines offer natural tie-ins for TV and that *Entertainment Weekly* would be another. It might also be a good complement to a TV buy.

Richard Kostyra, executive vice president and U.S. director of media services for J. Walter Thompson, sees *EW* as "an expansion of the *Premiere* concept." *Premiere*, a publication of Rupert Murdoch's News Corp., covers movies and home video. Kostyra sees *EW* as serving an existing market now served by different sources but available in one place and with more information.

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Analysis shows independent TV stations air more primetime news

KHJ-TV's planned three-hour primetime news show in the Los Angeles market caps a recent nationwide move toward more local news by indies in primetime. An analysis by TV/RADIO AGE, based on Nielsen source material in all markets, reveals a 23.5% increase in the number of indies with regular weekday news in the 7-11 p.m. daypart over a 12-month period.

In the May '89 sweep, there were 42 indies with primetime news compared with 34 the previous May. The increase raised to 30 the number of markets with primetime independent news this past May. In May '88, there were 26 markets with indie news in primetime. During the intervening year, five markets saw the debut of indie primetime news, while in one market, such news was dropped.

Lured anchor. The Walt Disney Co., owner of KHJ-TV, signed Jerry Dunphy, 68-year-old anchor, who had been at KABC-TV (which runs three hours of local news from 4-7 p.m.) for 14 years, as lead anchor.

Los Angeles is the newsiest market in the U.S. for both affiliate and indie stations. KNBC-TV now runs two-and-a-half hours and KCBS-

TV airs 90 minutes but ran two-and-a-half hours two years ago.

Five indies now air primetime local news in L.A. All four major indies—KCOP(TV), KHJ-TV, KTLA(TV) and KTTV(TV)—field an hour of local news each weekday evening—except when KTLA and KTTV are interrupted by baseball. KDOC-TV (Anaheim), which aired no primetime news back in May '88, telecasts a half hour, but only managed a 0.1 rating this past May.

Other new stations—and new markets—with indie primetime news are WGNX(TV) Atlanta, with a 4 share for its 30-minute *News at 10*; WAYK(TV) Orlando-Daytona Beach-Melbourne, with no recorded ratings for its 30-minute *NewsScene*; WVTW(TV) Milwaukee, which pulled down a 6 share for its hour-long *9 PM Nightly News*; WPXT(TV) Portland-Auburn, Me., which got a 1 share for its hour of *News at Ten*, and KVHP(TV) Lake Charles, La., with a 6 share for 30 minutes of *Fox 29 News*.

New CBS News Services V.P. points to overseas link exclusive

John Frazee, newly promoted to vice president of CBS News Services, points out that CBS is alone among the Big 3 U.S. TV networks in supplying a daily video and live newsgathering link to foreign broadcasters as well as its own U.S. affiliates.

Frazee, who until late June had been executive producer of the CBS operation—which includes NewsNet—since fall 1983, was responsible for creating CBS News' satellite newsgathering system in 1986.

Thirty-three broadcasters in Europe alone presently subscribe to NewsNet, Frazee discloses. In addition, there are "about a dozen" in Canada, several in Central and South America, three in Japan and one in Australia, he adds. CBS has been alone in having this news link abroad "for many years," he notes.

Mini-summit pickup. "All of our subscribers pay a fee" for the service, a figure which Frazee labels "confidential." The story that recently generated the most overseas pickup from NewsNet was the mini-summit meeting between Russia's Mikhail Gorbachev and Cuba's Fidel Castro, he recalls.

Also included in Frazee's bailiwick is CBS' SNG truck subsidy plan, whereby the network pays affiliates up to \$150,000 per vehicle

(TV/RADIO AGE, April 3). As Frazee noted in early spring, no fewer than 50 CBS affiliates have so far taken advantage of that subsidy. By year's end, he expects that another 10 stations will come aboard.

Turning to U.S. stories generating the most pickup in the NewsNet family, Frazee cites the Pete Rose betting scandal.

CBS' newsgathering operation was among the topics discussed at the recent affiliates convention in Los Angeles. "The affiliates are pretty happy with it," says Frazee,

*Thirty-three
broadcasters in
Europe subscribe
to NewsNet and
about a dozen
in Canada.*

who came to CBS News from KMOX-TV St. Louis. While at that station, he held such posts as executive producer of special reports and deputy director of news between 1975 and 1983. He also was exec producer of the first local documentaries on AIDS (in 1978) and on dioxin poisoning (in 1977), according to CBS News.

TV independents with double-digit household shares of primetime local news

| | | |
|------|----------------|----|
| WTTG | Washington | 16 |
| KTVU | San Francisco | 15 |
| WGN | Chicago | 13 |
| WSVN | Miami | 13 |
| KMSP | Minneapolis | 12 |
| KPTV | Portland, Ore. | 12 |
| KMPH | Fresno-Visalia | 11 |
| KSTW | Seattle | 11 |
| KTLA | Los Angeles | 11 |
| KPLR | St. Louis | 10 |
| KWGN | Denver | 10 |

Source: A. C. Nielsen, May '89, 7-11 p.m., Monday-Friday

ABC pushing for out-of-home viewing measure on broad basis

The growing interest in out-of-home viewing is being given a boost by network-sponsored research, some of which may lead to a regular syndicated service (see also *Final Edition*, June 26). The ABC Television Network is playing a leading role in this effort.

A major research project covering out-of-home viewing, sponsored by the ABC web and ESPN (80% owned by Capcities/ABC), was announced earlier this month in New York at the Advertising Research Foundation's First Annual Media Research Workshop. The study, to be conducted by Nielsen, will take into account such TV viewing as that on battery-operated sets, in second homes, on college campuses, in restaurants, bars, hotels/motels, at work, in airports and hospitals.

Using a personal diary, Nielsen will conduct a pretest during the period July 27 to August 2. The first full-scale monthly study—which may be followed by others—will be held in November. Others may follow during the other sweep months—February, May and July of 1990. The designated nationwide sample will consist of 6,500 persons 12-plus, with about 3,500 diaries expected to be returned. Cost of the project is estimated at \$500,000. Data will include program ratings as well as general information on the location of the viewing.

Regular service. Richard Montesano, vice president of market research for Capcities/ABC, who is chairman of an ARF committee on out-of-home viewing and is a member of the Committee on Local Television Audience Measurement (COLTAM), which is developing a personal diary that will include out-of-home viewing, would like to see the Nielsen study develop into a regular syndicated service which might eventually be "integrated" into network audience measurement. Montesano hopes to see communication between Nielsen and COLTAM "that will evolve into a research instrument for the best possible personal diary—one

that could be used locally."

While Nielsen is supportive of research on out-of-home viewing, the research company is cautious about predicting what will be available in the way of audience measurement. John Dimling, executive vice president of Nielsen Media Research, finds the question of local out-of-home measurement embroiled in too many issues at present to warrant any kind of flat approval. As for "integrating" out-of-home data into the existing network service, Dimling throws cold water on the prospect of a complete melding of data. Out-of-home data would not likely be integrated into pocket piece numbers, for example, he says. As for sharing data with COLTAM, that's entirely up to the sponsors of the research, explains Dimling.

The ABC network, along with the Marketing Division of the CBS/Broadcast Group, recently announced the results of a study of daytime out-of-home TV viewing, conducted by Bruskin & Associates last April.

College students. The study found, according to its sponsors, that nearly six million college students and working women, reached by daytime TV over a week's time, are not counted in the Nielsen ratings. Of these "unmeasured" viewers, described as among two of the most desirable demographic targets for advertisers, 2.6 million were women watching at work and 3.1 million were college students watching on campus facilities or in temporary residences for the school year. The college audience includes two million female and 1.1 million male students.

The study involved daily telephone interviews among 5,076 adult working women and 2,216 personal interviews with students at 19 colleges across the country.

It was estimated that the addition of working women and college student viewers would add 5% to the average minute rating of a daytime network program. Among the 18-34 audience, the addition would amount to 10%.

Sky One relaunch geared to attract young audience

Sky Television is relaunching its entertainment channel under the banner Sky One, gearing its programming to an ever greater extent than in the past primarily to young adults. In addition, Sky is embarking on a \$16 million marketing campaign aimed at convincing viewers, says Sky joint managing director Pat Mastrandrea, of the strength of the satellite channel's product.

Highlighting the new schedule, which will bring joy to U.S. distrib-



For youth: "21 Jump Street"

utors, are a number of American staples, past and present—among them *21 Jump Street*, which does well on Fox Broadcasting, Sky's American cousin. To underline the youth look, Sky executives claim the show attracts the highest proportion of young adult viewers of any series in the U.S.

Looking for partners. Also included in the fall lineup are *Wiseguy*, *Family Ties*, *ALF* and *Moonlighting*. Sky, which has been criticized in the past for not producing more of its own programming, also seems to be taking steps to silence those detractors. Program director and the other half of the joint managing director team, Gary Davey, says that the channel is looking for co-production partners for miniseries, dramas and sitcoms, adding he is close to a deal with one British producer.

TV Business Barometer

Local business up 3.5% in May

The *TV Business Barometer* sample of stations showed a dropoff in local business growth during May compared with April, but the vagaries of the Standard Broadcast Month (SBM) offsets this a little. The local (percentage) growth level was about the same as that of spot in May, but local time sales year-to-date are still performing better than spot in growth terms.

The local increase in May came to 3.5%, just a tad lower than the spot figure (3.8%). May was a four-week SBM this year vs. five weeks last year, so while most *Barometer* stations report on a calendar month basis, those that report on an SBM basis still affect the overall figures somewhat. Hence, the local percentage increase was a little greater than shown in May.

Local billings topped the \$600 million mark in May, as did spot,

The local figure was \$611.9 million, up from \$591.2 million the year before. Spot, with a 3.8% increase, hit \$617.4 million.

Smaller stations appeared to have done better in May than the larger and medium-size stations. The under-\$7 million bracket showed an average 10.9% increase, the \$7-15 million group went up 3.1%, while the \$15 million-plus outlets showed an average increase of 2.8%.

For the first five months of the year, local time sales totaled \$2,518.1 million, up from \$2,367.6 million last year. That's an increase of 6.4%, which compares favorably with the spot rise of 2.2% over the January-May span.

Local billings are still slightly behind spot for the year-to-date, with spot time sales reaching \$2,530.2 million. But local is expected to catch up and pass spot before the year is out. Last year, local passed spot in October and ended the year \$86 million ahead of spot. The gap

should be greater this year with the local percentage growth running ahead of that of spot.

Network compensation showed one of its lowest '89 percentage increases in May. Up to May, network comp had been exhibiting surprisingly good figures considering its poor performance last year.

The May increase was 1.3%. Through April, network comp had been ahead 4.8%, with one month, February, up 9.7%. The network distribution to stations amounted to \$37.3 million in May, up from \$36.8 million during the previous May.

Total for '89

For the five months to date, network comp stood at \$198.9 million, compared with \$191.0, representing an increase of 4.1%.

For May, the total of spot and local time sales plus network comp came to \$1,266.6 million, up 3.6% over May '88. For the five months, the grand total of the three segments amounted to \$5,247.2 million, up 4.2%.

May

Local business **+3.5%**

(millions)

1988: \$591.2 1989: \$611.9

Changes by annual station revenue

| | |
|-------------------|--------|
| Under \$7 million | +10.9% |
| \$7-15 million | +3.1% |
| \$15 million up | +2.8% |

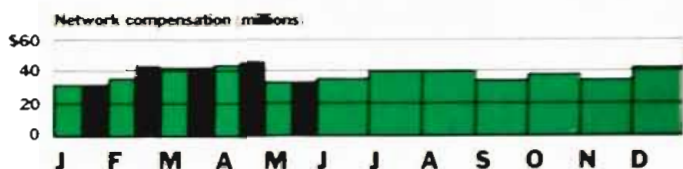
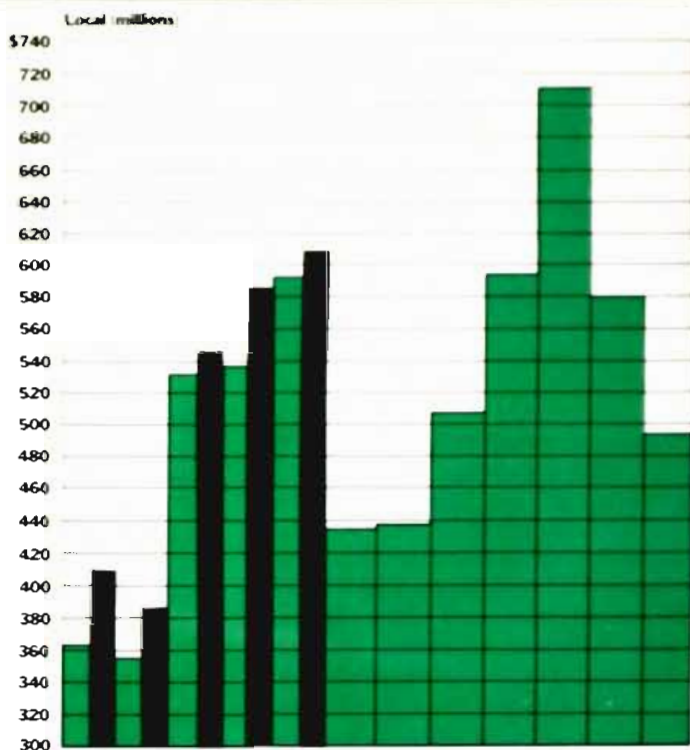
Network compensation **+1.3%**

(millions)

1988: \$36.8 1989: \$37.3

Changes by annual station revenue

| | |
|-------------------|-------|
| Under \$7 million | +6.2% |
| \$7-15 million | +4.5% |
| \$15 million up | -0.2% |



New book labels fairness doctrine, equal time as useless failures

A TV newsman-turned-academic, Hugh Carter Donahue, has written a detailed chronicle on a subject that's long raised the hackles of most broadcast journalists—the fairness doctrine.

In his book, *The Battle to Control Broadcast News: Who Owns the First Amendment?*, Donahue retraces the origins of the fairness doctrine—which required broadcasters to provide balance in their programming—and the equal time law—which had since the 1920s stipulated that both serious and fringe political candidates should be given equal access.

In his book, newly published by The MIT Press, Cambridge, Mass., the assistant professor at the Ohio State University School of Journalism contends that those restrictions were never really justified and that today in particular, with all the viewing options available to the public, they are obsolete. Although the government placed limits on broadcast while leaving print unfettered, Donahue maintains that the broadcasters did not become the “uncontrollable monster shaping mass consciousness” that politicians and others forecast. Rather, he concludes, “Candidate-centered organizations, not the broadcasters, are the Franksteins of modern American politics.”

‘Dubious constitutionality.’ In 1987, after decades of broadcasters’ protests that the fairness doctrine chilled news coverage, stifled controversial programming and discouraged editorializing, the Federal Communications Commission under Chairman Dennis Patrick abolished the doctrine while retaining the equal time rule. Still, as Donahue recalls, only President Reagan’s mid-1987 veto stopped the Congress from bypassing the FCC on the matter.

Reagan agreed with the broadcasters that the bill would have violated their First Amendment rights. Oddly enough, Donahue

points out, “Broadcasters won First Amendment freedoms just as they began to lose economic dominance... [and] are most challenged and least monopolistic.”

The author contends, “Broadcast news is neither so dangerous nor so persuasive that a fairness law of dubious constitutionality will accomplish an overriding public good... A law that denies broadcast journalists their First Amendment freedoms diminishes politics and assaults a critical liberty.” Both the fairness doctrine and equal time “have failed,” he adds. “They inhibited more news and public affairs programming than they allowed,” and politicians and interest groups used those rules to suit their own aims.

Near chaos. The equal time rule nearly caused chaos for the 1960 presidential campaign. In July '59, CBS, which had invited Sen. Hubert Humphrey to discuss his entry in the race on *Face the Nation*, suddenly disinvited him—fearful that Lar Daly, a candidate on the so-called Poor Man’s Party ticket, would demand equal time. Daly had raised that issue as a minor mayoral candidate against Chicago’s Richard Daley earlier in the year. Anticipating what one politician called “a very chaotic situation” in Campaign '60, various Congressmen quickly introduced bills to prevent such snags. The House of Representatives version later was approved as law, exempting news, interviews and event coverage from equal time’s domain—the first major change in that law in 50 years.

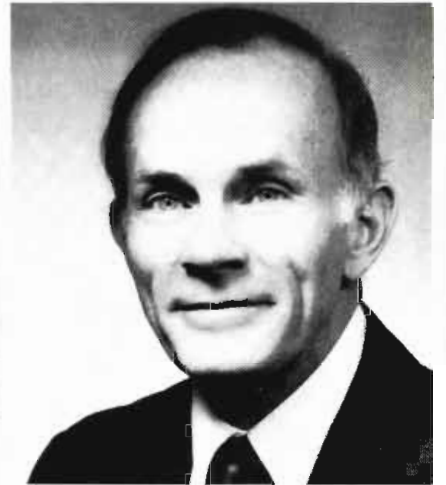
Losing control. In 1975, the FCC gave the networks a freer hand in covering debates but said they could neither initiate nor control them. A third party, the League of Women Voters, stepped in to host the Ford-Carter debates but the networks soon were angered by its caving in to the candidates’ demands that left the debate format

more like “parallel news conferences,” as Donahue puts it. Again in 1980 for Carter-Reagan and in '84 for Reagan-Mondale, the league “submitted to candidate veto of journalists [and] perpetuated the parallel press conference format,” he adds.

Thanks to the waiver of equal time by the FCC, the 1988 primary campaign trail was dotted by 20 debates, followed by the Bush-Dukakis debates.

Daniel L. Ritchie named chancellor at U. of Denver

Daniel L. Ritchie, who was chairman and CEO of Westinghouse Broadcasting Co. from 1981–87, has been appointed the 16th chancellor of the University of Denver. He had served the university as a trustee for six years and was vice



Daniel L. Ritchie

chairman of the board of trustees and chairman of the trustee development committee.

Board chairman Edward Estlow describes Ritchie as “the hardest-working trustee on the board. He started right in six years ago, meeting with faculty groups, explaining the changes taking place, building their morale and confidence. Through that process, he developed a detailed understanding of the university’s programs.”

Estlow says Ritchie played a key role in DU’s financial resurgence and “has been the university’s premier ambassador to the corporate and civic community.”

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BBC's new freedom in late night hailed as a financial boon

BBC Enterprises officials have hailed the government's decision granting the BBC the continuing right to operate its two television channels overnight. The government had indicated it might want to turn the channels over to other operators, but now has said it won't.

The decision means that plans for encrypted overnight services designed for specific target audiences will go forward without fear of governmental intervention. The BBC currently feeds a program aimed at doctors; it is intended for taping. Although for practical purposes it only sells the airtime on that series, it plans other programs in which it will have a more active role editorially and substantial financial investment. The BBC, for instance, is coproducing a financial series with the prestigious *Financial Times*, which it plans to begin downloading early next year.

Nevertheless in spite of optimism for a continuing expanding market for BBC material, Enterprises' chief executive James Arnold-Baker says he is concerned about a downturn in the British economy. He says that it has begun to cut into *Radio Times* advertising revenue. The weekly program listing magazine is Enterprises' biggest money maker, accounting for a considerable part of its more than \$250 million in 1988-89 revenues and a large percentage of its \$19 million pretax profits.

New competition? Also of concern is the future of the copyright restriction which precludes any other publisher from printing a weekly magazine listing BBC schedules. Although the BBC is vigorously fighting European and Irish Court challenges to the restriction, it generally is conceded that there eventually will be competition to *Radio Times* and the commercial television weekly listing magazine, *TV Times*, which enjoys the same freedom from competition.

Arnold-Baker says that the BBC

has analyzed the effect of competition coupled with the fact if the restrictions were lifted, *Radio Times*, too, would be in a position to print all programming schedules. It would seem likely that competition in this area would adversely affect Enterprises' profits, at least in the short term, at a time when it is on target toward doubling profits by the end of the 1992-93 financial year. Arnold-Baker also blames what he termed the recession in the U.K. for undermining the sale of satellite dishes, "If you have a big mortgage payment each month," he offers, "you certainly don't want to buy a dish."

U.K. mortgage payments have increased substantially during the past several months as the government stepped up interest rates to counter rising inflation. U.K. mortgages are usually flexible, reflecting current borrowing rates. Nonetheless, in spite of its relatively slow growth, Arnold-Baker is optimistic about the longterm future of satellite television. He viewed both the U.K. direct broadcast satellite franchise holders British Satellite Television, to be launched next year, and Sky Television as potential clients, adding Enterprises was quite close to a programming deal with BSB.

Coproduction. Enterprises also has been investing heavily in coproduction deals, \$33 million during the recently concluded financial years, and intends, says Arnold-Baker, to expand that activity, not just in the U.S. and Australia, but, he says, in Europe and Japan. He comments that the new deals probably would involve series rather than specials.

Arnold-Baker acknowledges the difficulty of trying to sell BBC programs in the U.S., saying that the vast majority of commercial customers "just don't want to buy off the shelf. They want to be involved in productions from the start." Total program sales, including those to the U.S., amounted to \$47 million during the last fiscal year, a 5%

increase over the year before.

BBC Lionheart Television, the organization's U.S. distribution subsidiary, contributed a modest \$7 million to the total Enterprises 1988-89 revenues. The company would, says Arnold-Baker, continue to play a significant role in the U.S. market, but it has been restructured, which would leave it concentrating on sales rather than coproduction deals. He says that it had vastly overblown overheads when the BBC acquired the company, but that costs now have been dramatically pruned, Lionheart was being recapitalized and was profitable.

Acquisitions. Arnold-Baker says Enterprises remained interested in acquisitions worldwide across all of its divisions. It would concentrate its own satellite efforts on France, primarily because the Olympus satellite, on which the BBC will broadcast, is in the same orbital position as the French TDF 1.

Arnold-Baker says that, while it was likely Enterprises would be floated on the stock market at some future time, he believes it would not happen within the next three years—probably, he comments, within five years.

Poland a likely Eutelsat member

Poland is soon likely to become the first Warsaw Pact country to join Eutelsat, the European Telecommunications Satellite Organization. Communist, Yugoslavia, a non-Pact nation, has been a Eutelsat member for some time.

Officials meeting in Switzerland said they would sympathetically consider Poland's formal application when it was made, which is generally a way of saying, "You actually apply and we will OK it."

Anyone who has ever tried to make a telephone call from Poland to the U.S. will be pleased to learn that the country, however, is more anxious to improve its telephone service than its television links to the West, which tend to work well, anyway. Although 70% of Eutelsat's revenue does come from television feeds, 17% is derived from telephony.



INFLUENCE

Radio Report

AOR audience continues to age, says Katz analysis

AOR is no longer a teen or 12-24 format, says Katz Radio research in its latest demo analysis of that music's audience. It's become programming that appeals to the 25-54 demo, with the heaviest concentration in the 25-34 group, says the rep. In fact, Katz now calls it "Adult Oriented Radio." The changes reflect the aging of the baby boomers.

The fall '88 Arbitrons actually show a little falling off in listening to the format by the 25-34 demo, but it's still the biggest in audience of the standard age categories. The latest figures put together by Katz show 25-34s accounting for 40.2% of the AOR audience compared with 41.2% in the fall of '87. However, in the fall of '84, the 25-34s were 30.7% of the AOR audience.

The second biggest segment of the AOR audience is 18-24s, with 34.7%, which, however, is a marked drop from the fall '84 level of 42.2%. In the fall of '87 the 18-24 demo attracted 36.1% of the AOR audience.

Also important. Ranking third in importance, but growing, is the 35-44 category, up from 10.8% in the fall '87 sweep and 5.7% in the fall '84 sweep to 12.7% in the fall '88 sweep. There is still a teen interest in AOR—9.0% of the audience in the fall '88 sweep—but that ratio has dropped from 18.8% in the fall '84 sweep.

The Katz analysis quotes Lee Abrams, described as the leading consultant of AOR stations: "The music people when they are between 16 and 20 years of age is the music that those people will like for life." Abrams explains as follows: "One of the most positive things about our format is that the audience is clearly growing with us. In the early '70s AOR was called a teen-only format. In the middle and late '70s we were a 12-24 format. Now nobody seems to be willing to expound on the fact that we are a 25-34 format."

Katz research points out that 25-34 "forms the backbone of radio's most requested demographic—25-54." The rep explains that 25-34 is the biggest of the standard age cells of the U.S. adult population with 42,634,000 persons, or 24% of the 18-plus population. This represents almost half of adults 25-54.

Westwood One, Fox, part of Coca-Cola megapromotion

Still another "conglomerate promotion" involving big radio, big television and a major advertiser is threatening to turn the giant CBS/K mart and NBC/Sears megapromotions into a trend. This one is Coca-Cola's Isle of Dreams Treasure Hunt in which Westwood One, Fox Broadcasting, Carnival Cruise Lines and the Cineplex Odeon theater chain will play major roles.

Culmination of this "unprecedented" cross-promotion, says James Patton, vice president, marketing ser-

vices, Coca-Cola USA, will be the Coca-Cola classic Isle of Dreams Treasure Hunt, in which one of 1,000 winners of a seven-day "fun-ship" Caribbean cruise aboard Carnival Cruise Lines' Jubilee will walk off with a grand prize of \$1 million.

Starting this month, the companies involved are combining national and local broadcast and print advertising with local radio partners, "tens of thousands" of retail displays, an in-theater sign-up program, and a nationwide Westwood One radio promotion, all to make "Isle of Dreams this summer's largest consumer promotion," says Patton.

It's all part of the "Official Soft Drink of Summer" marketing campaign for Coca-Cola classic and offers consumers thousands of additional prizes through local Coca-Cola bottlers and stations carrying Fox programs.

Local promotions. Patton says winners of the Carnival cruise will be selected via an "unprecedented array" of local promotions between now and Labor Day, with "virtually the entire Coca-Cola bottling system and more than 115 TV stations that carry Fox programming teamed up to produce exciting contests and special events," ranging from on-air trivia challenges and watch-and-win programs to local riverboat excursions, beach parties and treasure hunts.

And through a special arrangement among The Coca-Cola Co., Fox and Cineplex Odeon, Isle of Dreams activity will also be offered to film patrons "during the busiest moviegoing season of the year." In August a 45-second film trailer will be seen on each of some 1,200 theater screens operated by Cineplex Odeon, which estimates that over 6 million movie fans will be able to register to win the Carnival cruise through special lobby sign-ups at Cineplex Odeon theaters across the U.S.

CBS sports sales unit backed by new research

Now that John Luginbill, who took over as director of CBS Sports Marketing for CBS Radio Representatives in November, has had time to get organized, he's expanded his operation with the addition of sports managers on both the east and west coasts. He's also been showing prospective advertisers and agencies some new research out of R. H. Bruskin/Omnitel that shows that, despite all the couch potatoes watching football on television, one of every two men hears weekend pro football at least once a month.

"It's not only the people on the road, listening in cars," explains Luginbill. "Even up here in the Midwest and Northeast, weekends in September and October are usually warm enough to be working around the yard, playing golf, riding your bike, washing the car or whatever. In Los Angeles and Dallas and Atlanta it's like that in November and sometimes December."

The research also shows that over half the men who hear pro football on radio have been to college, almost

Launch of Dutch commercial TV good news for U.S. distributors

There is good news from Holland for U.S. distributors. The European revolution in television has reached The Netherlands.

Buyers for the first two commercial Dutch cable channels, Tele Veronique and TV 10 to be launched this fall, are shopping for American shows to fill their seven day a week schedule. Seventy-seven percent of Dutch households are connected to cable. TV-10, for instance, has chosen *Indiana Jones and the Temple of Doom* for its October 28 inaugural.

Until then, Dutch viewers can only turn to the three channels provided by the state broadcaster, NOS. The arrival of commercial channels will not only break NOS' longstanding monopoly on the market but also will increase the competition for U.S. programs.

Competition. Herman Slager, NOS program directors board secretary, acknowledges that the commercial channels will not make life easy for NOS. One of the main problems, Slager points out, is that TV 10 and Tele Veronique can pay higher prices for programs and buy in greater quantities. NOS, he says, is restricted to a "price control system." As a result, Slager adds, so far in the buying war it has been difficult to buy new shows; "We are losing a lot of programs to the new channels," he admits. Nevertheless he vows NOS will not roll over and play dead. "We will," he adds, "fight back." In fact according to Slager, the competition has encouraged NOS to try to begin negotiating bigger packages instead of a feature just here or there. He also stressed that in NOS' favor is its long existing relationship with the U.S. majors, believing, "They won't want to throw away the old shoe until they see if the new one fits."

Notwithstanding, to the delight of many distributors, the increased competition is likely to force NOS into making much faster decisions on which programs it wants to buy. When it starts broadcasting in October, TV 10 will be ready with a number of new American series and other purchased programs.

Pim van Collem, chief buyer for TV 10, explains that the channel will import about 50% of the material it broadcasts with a heavy emphasis on American product; approximately 25% of the material acquired will originate from Europe, he says.

So far, among other programs from the U.S., TV 10 has purchased *21 Jump Street*, *Star Trek: The Next Generation*, *The Bold and the Beautiful*, *Baywatch*, *Dear John*, *Murphy Brown* and *The Confessional*.

Own product. Underlining Slager's point, van Collem concedes that the increased competition has made it much more difficult to make the big deal with the major companies, which he says is what we want to do—"big output deals and big volume." TV 10's search for viewers, however, will not be limited to the U.S. series and films it has acquired.

The channel is owned by G.E. Entertainment, one of the most successful and largest producers of Dutch programs. Specializing in game shows, TV 10 will broadcast a number of them. Many well known performers, represented by G.E., have left NOS to join TV 10, which according to Slager, does not sit well with NOS. Unrepentant, van Collem believes this niche of the Dutch entertainment world, on which TV 10 has a hold will be one of its main attractions.

While Americans start the day tuned into the morning shows, few networks in Europe offer a breakfast time service. The other new Dutch commercial channel, Tele Veronique, however, will be one of the them. It hopes to break new ground in the market by offering *Good Morning Holland* from 7-9 a.m. Patterned after the American show with a similar name, it is an innovative step in a country where programming doesn't tend to start until 3 p.m. In this time period, Tele Veronique will not have any competition from NOS. The network, Slager points out, is not allowed an extension of its existing transmission time.

Cable in Britain: Interest is high, movement slow

While there continues to be increased interest in cable franchises in the U.K., the British Cable Authority admits there has not been much actual laying of cable. There were 32 new franchises awarded during the year ending March 31, 1989, well up from the previous year. Nevertheless, there were only 10 operating franchises at the fiscal yearend, the same number as the year before.

Writing in the Authority's annual report, chairman Richard Burton acknowledges that cable "needs to be established as a fact in many more areas and to be supplying a range of new and worthwhile programming and services before it will be taken very seriously by the people of this country."

Burton blames the government's approach to cable for hindering development. He also laments the lack of British investment in the industry.

Nevertheless, this British disinterest, he says, is offset by the continuing investment of U.S. and Canadian companies in the U.K. He applauds, among others, Pacific Telesis and U.S. West as two organizations which see potential in U.K. cable and view the possibility of providing a telecommunications service as a bonus.

German invasion of Poland a seller

BetaFilm, West Germany, reports a number of European sales for its 90-minute live September concert from Warsaw marking Hitler's invasion of Poland and the start of World War II.

The program, featuring Leonard Bernstein, among many other notable artists, has already been sought by various networks, including those in Germany, Austria, Denmark and the U.K.

BetaFilm also lined up at least six European broadcasters for the 80-minute documentary, *For All Mankind*, commemorating the 20th anniversary of the U.S. moon landing. TVE, Spain; SAT 1, West Germany; and RAI 1, Italy were among them.

Radio Business Barometer

Spot is up 16.5% in May (adjusted)

Second quarter spot radio billings should come out better than the first quarter, when the final figures are totaled up. While the May figures reported by the Radio Expenditure Reports people didn't quite keep up with the April pace—after adjustments—they were still double-digit advances. The fact is that spot radio is having a good year.

As in April, the May figures must be shown with adjustments since the May figures are based on a four-week Standard Broadcast Month (SBM), while May of last year was a five-week SBM. The April situation was just the opposite. So April and May combined are comparable: nine weeks vs. nine weeks.

May billings from rep business came to \$100,291,500 compared with \$107,652,800 in May '88. The unadjusted percentage change comes to minus 6.8%. The adjusted May billings figure for '88 is knocked down to \$86,122,200,

which turns the performance around to an increase of 16.5%.

The top 10 markets continued in May the strong advances which they displayed in April, leading to the likelihood that they will top the other three market groups broken out by RER when the second quarter figures are finally in.

An (adjusted) increase of 26.5% in May for the top 10 markets, on average, follows an (adjusted) increase of 34.9% for April. May billings for the top 10 markets totaled \$40,767,700.

The 11th-to-25th markets showed an adjusted rise of 14.2% in May, with billings of \$21,155,200. For the 26th-to-50th markets, the adjusted figure was plus 7.6% and billings came to \$15,100,900. As for the 51-plus markets, the adjusted percentage figure showed an increase of 9.0%, with billings of \$23,267,700.

A comparison of April and May together, which, as noted, total nine weeks in both '88 and '89, according to the Standard Broadcast Calendar (SBC), shows that '89 is up 17.7% over last year, unadjust-

ed. The two month total this year was \$210,403,900 vs. \$178,761,600 for April-May '88.

For the 22 weeks of the SBC through May, spot radio billings commissionable to reps totaled \$411,788,400, compared with \$365,105,700 for 22 weeks in '88. The increase amounts to 12.8%.

Year-to-date

As for year-to-date figures on the four market groups, the data show the larger markets generally doing better than the smaller markets. These are averages, of course, and do not mean that all markets performed equally well (or poorly).

The top 10 markets remain ahead of the pack with a five-month increase of 17.1%. Total billings come to \$161,254,400. Also showing a double-digit increase was the 11th-to-25th market group, up 12.4% to \$88,245,200. The 26th-to-50th markets rose 8.8% to \$63,743,000, while the 51-plus group lifted its billings 9.1% to \$98,545,800.

The 12.8% increase for spot radio through May compares with the 6.6% increase for all of last year as shown by Radio Expenditure Reports, based on rep data.

May

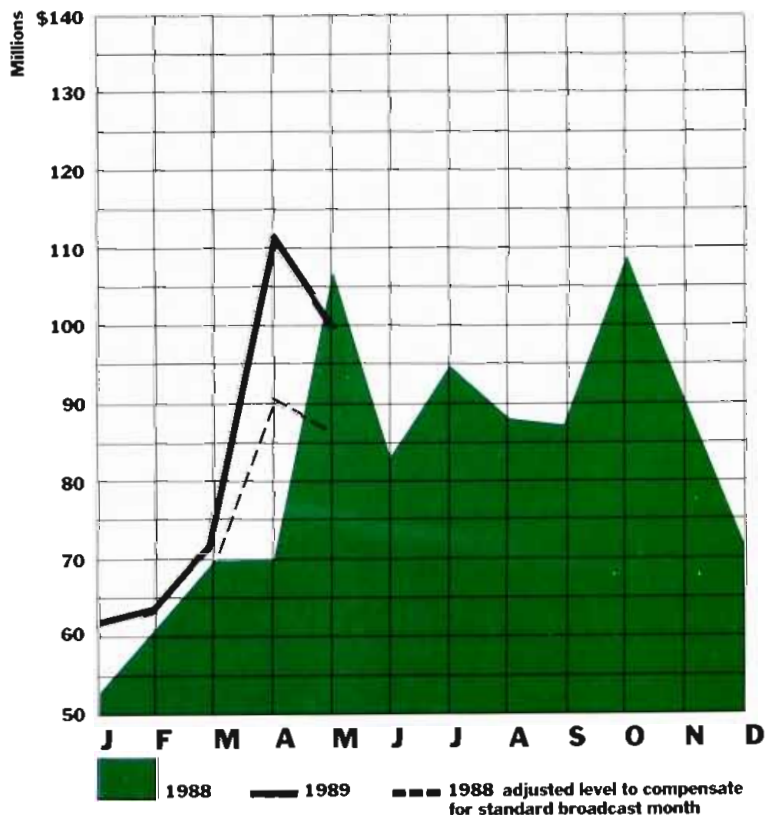
National spot +16.5%*

(millions) 1988: \$107.7 1989: \$100.3
1988 adjusted: \$86.1

Changes by market group

| Market group | Billings (mils.) | % chg. * 89-88 |
|--------------|------------------|----------------|
| 1-10 | \$40.8 | +26.5% |
| 11-25 | 21.2 | +14.2 |
| 26-50 | 15.1 | +7.6 |
| 51+ | 23.3 | +9.0 |

Source: Radio Expenditure Reports
* Adjusted



half have annual household incomes of \$30,000 or better and 53% are in jobs in which they make business purchasing decisions. And much, much more.

And that, says Luginbill, "means our prospect targets are not only the automobiles and beers: They include the business-to-business categories like copiers, fax, computer companies, telephone services and financial services. And *Sports Illustrated*. In some markets SI will sell subscriptions. In the major advertising centers SI will sell itself as a medium."

Making it work. He adds, "If you're an advertiser, the way to really make sports radio work to its full potential is full season sponsorship—of the games, and/or sponsorship of special sports features like a brief MVP award at the end of every game. If it's a college game, a scholarship in the MVP's name for his school is always great PR. Then there's the pregame and postgame locker room reports."

Luginbill says sponsors already signed for pro-football this fall include Sears, Texaco, Anheuser-Busch, Panasonic, Farmers Insurance, Chevrolet, Jeep-Eagle, Honda, Nissan, Amoco and Goodyear.

Different copy every day 'makes listeners listen'

Commercials that get fan mail? That's what David Baer, president of Pittsburgh-based American Information Management claims.

Baer describes his company as "a communications agency" that, among other things, is currently adapting the "serial conversational infomercial" Baer devised for client Heritage Travel for use by other business categories. Baer says it should produce the same listener effect for banks, financial planners, health care providers, attorneys and even architects that it does for Heritage, other travel agencies, and, though not Baer's client, Northwest Airlines. Northwest uses its own variation of the idea, with spots that offer tips on business customs in such Pacific Rim trade centers as Japan and Hong Kong to nail down its position as the airline that knows the Orient.

Describing how his kind of commercial works for Heritage Travel on CBS all-news WCBS New York and WEEI Boston, Baer notes, "A lot of companies use infomercials today to convey information to listeners. But we've adapted this to what we call 'information marketing' for Heritage Travel. The difference is, we change the information every day. We prepare a new and different script for each day of the week, Monday through Friday. We send them to Thornton Clark [senior vice president, sales and marketing] at Heritage headquarters in Boston. Over four weeks we send him 20 different one-minute scripts. He records them in bunches, one after the other, at WEEI, which sends tape copies to WCBS. But they only play one each day. They play it twice, once in morning drive, once in afternoon drive."

Baer explains the reason listener impressions are so great in the face of such a low level of frequency is, "They're memorable. People are listening to informa-

tion that stands out above the general clutter. They listen because Thornton isn't selling them anything. He's telling business travelers things that are useful for them to know when they get to where they're going."

Using the example of a computer company instead of a travel agency, Baer explains, "Instead of bragging about 'We have more megabytes,' we'd tell people how to use a computer to solve a problem common to many different kinds of businesses. If it's a law firm or doctor who's never advertised before and may feel uncomfortable about the whole idea of a professional advertising his services, this is a way to make a good impression without putting a scratch on his professional integrity and ethics. That's because he's not 'selling' himself. Instead, he's giving useful advice about your health, or about a common legal problem like making a will."

Baer adds that the delivery style is up to the client, depending upon his particular personality and conversational style: "Thornton happens to have that natural, cultivated Bostonian FDR fireside chat delivery for Heritage. That happens to be the way he speaks, naturally to everyone, on the radio, face-to-face, or on the phone. But we can get equally good response from a more relaxed, down-home approach, the way Tom Bodett does it for Motel 6."

Baer says Heritage has been using his infomercials for about two years but that "We've been doing this for Mon Valley, another travel agency, right here in Pittsburgh for even longer. As you can see, the response they get has kept them coming back for more every year. And since we started with Mon Valley, we've added other travel agencies besides Heritage, in Kansas City, San Diego, Salt Lake City and Charlotte, North Carolina. Meanwhile, we keep soliciting other travel agencies in other markets."

Cable's CNBC now feeds NBC Radio Net

As Colorado Springs-based Business Radio Network and Money Radio Network out of Anaheim, Calif. continue to add affiliates to their 24-hour business and financial talk networks, NBC's CNBC (for Consumer News and Business Channel) for cable is expanding into radio. As of July 10 CNBC, started feeding Westwood One's 500-odd NBC Radio Network affiliates *The Business Minute*.

Michael Eskridge, president of CNBC, coowned by NBC and Cablevision Systems Corp., says the radio reports will be offered six times each weekday morning and will be continually updated by CNBC news personnel around the globe. Updates will include overnight developments from Tokyo and London as well as breaking stories from U.S. financial centers.

Meanwhile, CNBC spokesmen insist that the original cable operation continues to work hard to make improvements in what some critics consider an unworkable mix of business and soft consumer features, up against the consistent all-business format of Financial News Network.



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KTVU(TV), originating station for the San Francisco Giants. Jeff Block, general sales manager, says the games did a 9 rating and 18 share, on average, with Nielsen, while the Oakland Athletics, in the same market, were doing a 7/15 on KPIX(TV). KICU-TV San Jose, which also airs Oakland games via its deal with KPIX, averaged a 4/9 in May.

KPLR-TV, the originating station of the St. Louis Cardinals, is soaring in numbers as a whole, registering large share increases in the May Nielsen report. St. Louis be-

came a metered market in May, explains Bob Fulstone, KPLR general manager, making the games easier to track. Baseball has been a major contributor to the station's ratings success, he says.

As an example, the late contests coming from the West Coast have been doing very well as the HUT level builds. "Against the San Francisco Giants, on May 5, the 9:30 p.m. starting game did a 20.9 rating and a 42 share. Our peak share for the game was a 54." In an earlier time start, at 7:30 p.m., a May 17 contest with the Houston

Astros did a 19.9/31, with a peak of 42. The weekends have been good as well, points out Fulstone. A recent Sunday afternoon contest against the Chicago Cubs delivered a 20.8/49 share, with a high of 61 at one point.

"That's incredible, and on that day KPLR was the No. 1 station in the market, sign-on, sign-off," he notes.

Batting high numbers

The Cincinnati Reds flagship station, WLWT-TV, is another example where ratings are batting out high numbers. According to Ned Paddock, director of sales at the NBC affiliate, the May Arbitron showed a 19 rating and 31 share, on average, in five primetime games. One Sunday afternoon contest garnered a 15/51. With such solid numbers, Paddock believes the Reds games are ranking at the top or close to the top nationally in primetime among flagship stations.

One major reason for the team's high ratings, continues Paddock, is the Reds' strong on-field play. In May it led the National League West race. Also, he says that the Pete Rose controversy has sparked national attention on the team, which may have added viewership on the local level as well.

The Minnesota Twins telecasts have gone to a new franchise—WCCO-TV Minneapolis—via the station's owner, Midwest Communications, which also owns WCCO radio and Midwest Sports Channel, regional cable network. And, according to Bob McGann, vice president, station manager, general sales manager at WCCO-TV, the on-air performance of the Twins games has been very strong.

In the May sweeps period, the telecasts got an Arbitron rating of 19 and a 38 share, on average, and a 17 rating in the Nielsen report. Of the 60 telecasts for the season, 35 are on WCCO, and the remaining 25 are carried by KITN-TV, Minneapolis indie, in a "farm-out" agreement. KMSP-TV, the previous Twins' rights holder, had 70 games. "That's 10 more than we have, but Midwest carries 60 different games on cable."

In its arrangement with KITN, WCCO buys the time for the tele-

New ball game at MSG web

It was a new ballgame for Madison Square Garden this year as new rights holders of cable games of the New York Yankees in a \$500 million, 12-year contract. Nonetheless, despite sales being handled by baseball sales rookies, the games are generating excellent sales, according to Douglas Moss, vice president, sales, at the Madison Square Garden Network.

"Considering that we had a late start—we didn't know we would have the product until mid-December—and then to produce and market it, we are doing very well, I had to hire a lot of new people, four new salespeople. And whenever you have new people there is a certain downtime in which the people have to learn. Also, there was some hesitancy on the part of advertisers who weren't certain about how many affiliates we would get. But we got it resolved by March, with a lot of operators signed on.

"By opening day we were doing fine. And the bottom line is that we have Miller beer, which made a major commitment to be the exclusive beer advertiser, as did Jeep-Eagle, The Wiz, B.F. Goodrich and Crazy Eddie, as upfront all-season sponsors."

Yankees help. Helping Moss' sales pitch are the Yankees themselves. "I like what I'm seeing right now. I don't think anyone will win the division by 10 or 15 games, and if the Yankees stay close, they have a shot. Mattingly and Barfield are starting to hit, and Sax has been consistent. Also, the young arms are being brought up from the farm system, and that's what people have looked for the Yankees to do for a long time. Advertisers look at that, and I think that the Yankees are taking on the form of a team with a very bright future."

While Moss doesn't spell out how much Yankee games are being sold for, he says he looked at sales rates in two ways. "We looked at how WPIX had sold the games in the past and the rates we charge for the New York Knicks and Rangers vs. the type of ratings that both teams deliver against the ratings that WPIX delivers.

Miller at this point is a multiyear deal, and Moss is working on a renewal of Jeep-Eagle. What the Yankees did for MSG, Moss adds, is to create a 52-week service, "which is what the advertisers want. While in some instances the advertisers are different for each sport, most look at the advantage of buying the entire package."

In the way of reach, MSG is guaranteeing advertisers 2.6 million homes by the beginning of this month and 3.3 million for next year. Most of the projected household increase comes from the upstate market, without the Cablevision systems in the state. Yankees ratings are based on coincidentals taken by MSG, says Moss, and he looks to the kind of ratings growth that WPIX has been having over the years, although the measurement universes are different.

Television/Radio Age

July 24, 1989

Rights fees continue to escalate, and the MLB deal made with ESPN, plus the CBS longterm arrangement, is seen as presenting potential business problems to the franchises.

TV ratings, ad sales reported healthy, helped by close team competition

Baseball stations hitting home runs in two ballparks

By ROBERT SOBEL

The business flag is waving briskly at many Major League Baseball flagship stations, and indications the All-Star break are that the ad sales winds will remain strong for the remainder of the season. Ratings and attendance, too, are enjoying health, propelled by sharp on-field competitiveness and close races in some instances.

But injuries to the stations may lie ahead. Rights fees continue to escalate (TV/RADIO AGE, Feb. 20), and the MLB deal made with ESPN, plus the CBS longterm arrangement, is seen as presenting potential business problems to the franchises while putting some \$15 million into each of the ballclubs' coffers at the beginning of next season.

Everyone loves a winner, or even a strong contender, and in the case of the Chicago Cubs, the adage prevails so far as ratings, attendance and sales are concerned. AT WGN-

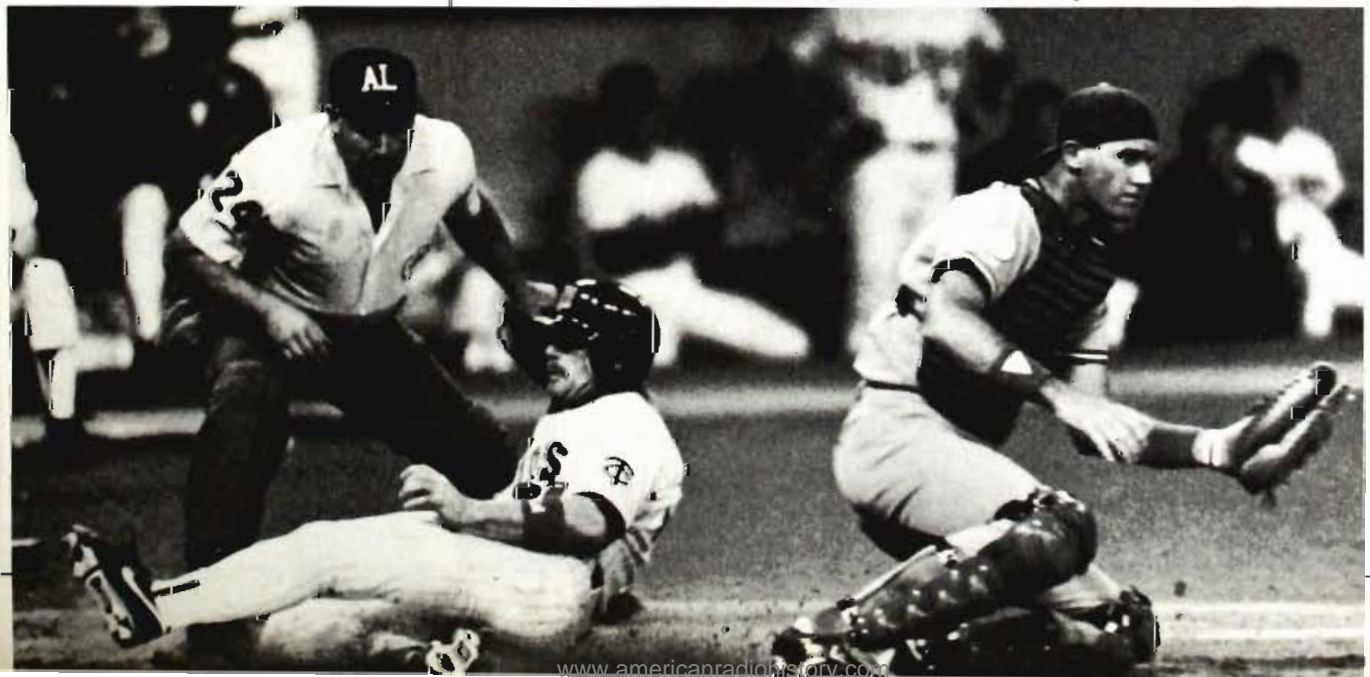
TV Chicago, flagship station whose parent, Tribune Broadcasting, owns the Cubs, Jake Fendley, sales director, says ratings are about 5-10% better than they have been in the past. In attendance, Fendley sees the ballclub hitting the million mark by the end of June, "in a ballpark that seats only 35,000, and with only eight or nine night games."

"It's nice to have a competitive team this year," says Rick Mills, general sales manager at KTVT-TV, Dallas-Ft. Worth, and originating station of the Texas Rangers. "We are up in ratings, which I think will pay off if the Rangers stay competitive, and will mean our ship will come in later in the year." In 23 telecasts in June, the games did an 8.1 Nielsen rating, which doubles last year's 4.2 average for the season, he says.

"And if I were comparing April and May this year against last season's, you would see we are up three rating points."

It was a merry month of May for

The Minnesota Twins: now on WCCO-TV Minneapolis



Passive 'meter' isn't passive

Sample householder recounts test of single source system

The following is a transcription of a recording from the archives of the Temple Institute for the Improvement of Society and Audience Measurement. It is one of the number of recordings made among members of households who participated in the testing of a passive people meter system involving the chemical dimethyl, dichloro, digallium, 1,2,3, isocynate, aminobutane lysergic acid (generally referred to as "DDD"), with its remarkable property for transmitting and detecting radio frequencies. The test, conducted by the Impeccable Media Research Co., was eventually suspended after many members of the sample, apparently affected by DDD, began breaking into uncontrollable laughter every time they turned on the television set. The recording recounts the experiences of William Bohansen, a 40-year-old light bulb salesman and head of the household, which is located in suburban Tulsa.

My first contact with Impeccable was a phone call about a year ago telling me that my family had been chosen to participate in a test that would determine what TV shows would go on the air. The young lady on the phone said that only a very small number of people had been chosen so that my family was being highly honored. That sounded pretty important and, besides, my family are great TV fans. But I wanted to talk it over with everybody and I said I'd call back. The

young lady said she'd wait by the phone, but I told her it might take a little while.

"We're the friendly research company," she twittered. "We care what you think. We mind what you do." "Do you have any other slogans?" I asked, feeling a little mean. "Oh, yes," she said. "You tell it, we sell it."

Except for Tommy, my 15-year-old, everybody was for it. My wife, Alice, who works for an advertising agency, Durstine, McClintock & Gossage, parttime, said she had always wanted to be part of a Nielsen family because it's always so deliciously secretive and reporters are always trying to uncover a Nielsen family. Penny, who's 12, said she had some very firm ideas about which shows should be on the air and which shouldn't.

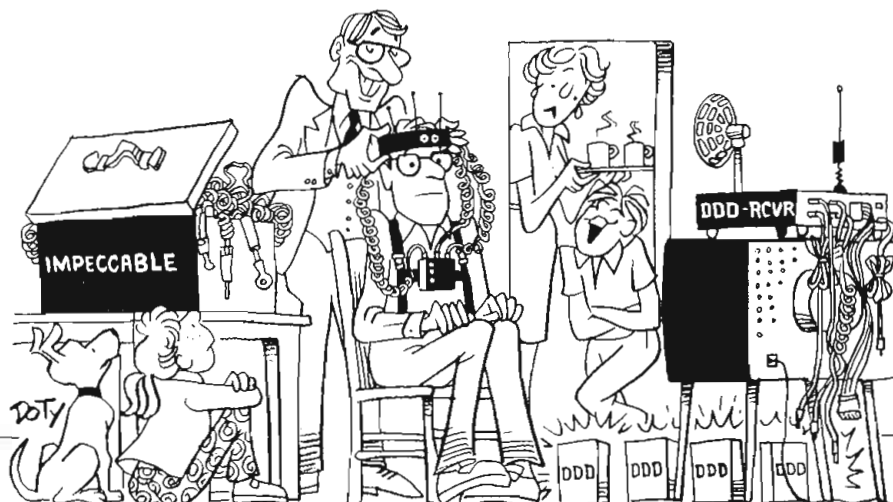
But Tommy said how come only a few people are being asked to decide what the whole country should watch and, besides, why should we bother without getting something out of it. When his mother pointed out that Nielsen families get presents for cooperating, Tommy said he'd go along if the presents were worth it.

So I called back and the young lady, who had a very musical voice, said someone would call about making an appointment to explain how the test would work. The next evening, a man from Impeccable called, said his name was Helmsley Parter—which I mispronounced a few times to his great annoyance—and we set up an appointment for

the following week, when everyone in the family would be available.

Parter came lugging two big, black, hard plastic suitcases, which, frankly, worried us right away. "You're going to enjoy this," he huffed and puffed, seeing our skeptical looks. He lined up the contents of the suitcases on the dining room table, around which we sat and which we had cleared off. "Of course, this isn't everything," he explained. "There's some more electronic equipment which we'll stow away in some corner of the house so that nobody will see it." We were getting more nervous by the minute.

First he took out a large piece of electronic equipment that looked something like a VCR. Parter said, "This is the DDD receiver. And this is the DDD. I'll explain what DDD is in a minute." The DDD was in four containers which resembled a large Nestle cocoa mix box. They seemed heavy. Each container was a different color. And then Parter began taking out the other stuff. "And this is the product usage wand. And this is the collector for the wand. And this book is our manual which explains all about our methods and equipment and how to use the wand. And this is the hold-your-head-up-straight harness. And this is the history of the company. And this is the book for your marketing comments. And this is the special marker for answering your monthly questionnaire on product purchases and



casts of the Twins, and is responsible for the games' sales. WCCO also sells time for MSC.

When it comes to sales at the stations, the team's on-field play also reflects the advertising strength as well.

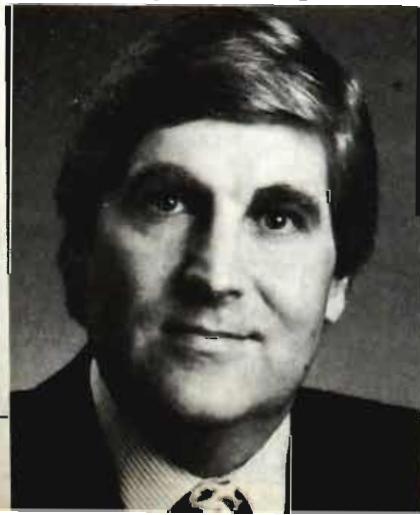
"The Cubs are a unique phenomenon, especially in this market," emphasizes WGN's Fendley. "We had a tremendous sell-in prior to the season, which is the strength of our operation. And going hand-in-hand with the big sell-in is that the general conditions in the market for the first six months have been overwhelming. Television in general has been booming in Chicago, and that, in combination with the Cubs being strong contenders so far, has made the sales of the Cubs that much better for us.

"Sales show no signs of declining. We are very strong through August and September in sales, and we're having our best year ever." Included in the upbeat sales activity are season sponsors and multiyear advertisers, "which makes things healthy for us in terms of having a solid base revenue coming in over the next few years."

In multiyear contracts, WGN has commitments from United Airlines, Anheuser-Busch, True Value, Unical, Pepsi-Cola and Nissan, not all running in unison. For example, Anheuser-Busch expires at the end of the year, but the contract has recently been extended for an additional three years, through 1992. True Value is in the second year of a three-year contract.

Spot sales dollars are up about 20-25% on the Cubs telecasts, says Fendley, and sponsors include

Howard Zeiden of WMAR-TV Baltimore reports strong preseason upfront selling.



Networks: Sales hold despite ratings

The picture where the two networks carrying baseball are concerned is glum in terms of ratings, but sales are going well, at least for NBC. The networks as a rule don't like to talk about sales, but Bob Blackmore, executive vice president at NBC, notes that the regular season games are "well sold," while the playoff championship series are going even better.

General Motors continues to be the sole domestic automotive exclusive. Other than that, "there are just scatter advertisers." As to prices, Blackmore confirmed that the playoffs are going for roughly \$175,000 per unit, or somewhat above, in rate card. (TV/RADIO AGE, Feb. 20) "That depends on the games and when they came in," says Blackmore, "and where they are in the package." For the All-Star Game, the price was about \$325,000 per unit, as reported by TV/RADIO AGE earlier. "That's probably the right price. It fluctuates, depending on when the package was made," says Blackmore.

When it comes to CBS, which will carry MLB in a four-year contract costing the network \$1.1 billion, the network has signed its initial automotive sponsors: General Motors for domestic, and Toyota Motor Sales for foreign. It's understood that the agreement calls for GM to pay about \$140 million over four years, for eight 30s per game. Toyota's shellout is somewhat less, \$32.5 million per year, but it gets only six 30s per game. The total package is worth about \$250 million in ad dollars for CBS.

CBS is said to be talking with beer sponsors and looking to wrap up a similar exclusive deal.

While the new agreements represent a substantial amount of ad dollars, one network source calls them "not that bullish. The prices are not as aggressive as we thought they might have been at this point in time. On the other hand, when there is that much money invested on the part of CBS, you have to get what you can and worry about the rest later."

Under its arrangement with MLB, CBS will air a minimum of 12 regular season games, plus it gets the three "jewels" as well, the All-Star Game, the Championship playoff series, and the World Series, beginning in 1990.

McDonald's and the Illinois Department of Tourism, a new buyer. Another healthy purchaser is P&G's Sure deodorant, which was an advertiser for about a two-and-a-half-month period, says Fendley. "They sponsored the play of the game." Sears, too, was heavy in spot dollars, increasing its frequency on the Cubs games this year.

WPIX(TV), flagship station for the New York Yankees, increased its telecast schedule this season from 40 to 75, necessitating a more concentrated sales effort to get more advertising dollars, notes Marty Appel, executive producer of the WPIX Yankees games. "People tend to do budgeting based on whatever they spent last year. Nevertheless, we have accomplished that. Sales have been very brisk, the number of sponsors is high and the per-game average is high in terms of dollars spent per

game." This is because the Yankees remain an exciting team to watch, although they're not particularly strong on the field, Appel says. The station has been close to sold out for most of the season to date, "although, looking ahead, there are available spots, obviously, because sometimes selling is done the day before the game."

The WPIX Yankee games have a number of all-season advertisers, such as Anheuser-Busch and the New York State Lottery. "The Lottery deal is somewhat complex," says Appel. "We carry the Lotto drawing, and part of the deal with them is that they advertise in Yankee baseball. The drawing is during a commercial break—usually the first one after 10:30 p.m." The lottery is a new baseball sponsor.

Because there's no exclusive deal on autos, a number of different

(Continued on page 100)

later made sure to put our names on the containers with a marker pencil. I noted that the containers were quite heavy. "They're lined with lead," he explained in an off-hand way. Now I know why.

By that time Tommy had figured out that each of us had DDD with a different frequency and that the DDD receiver picked up the radiation that each of us was giving off and converted it into some kind of code. That was combined with the meter which recorded which channel was on and when.

Parter was with us until early in the morning explaining how to use the wand to read bar codes on products we bought in the supermarket, how to punch into the wand purchases of products that didn't have codes, what button to push to indicate the product was bought with a store coupon, what other button to push when the coupon came from a newspaper insert and what button to push when the product was on sale with no coupon. We also had to keep track of special store promotions and displays. On top of that, we had a diary to keep track of our radio listening and when we read newspapers and magazines. There were a lot of other things, too. I don't remember them all. One thing I liked to do was write out my comments about advertising campaigns. That was in the Impeccable booklet. I really gave it to those Madison Avenue guys.

The installation of the electronic equipment took a long time. One guy was always bumping into doors and chipping paint. "You're gonna have 25 miles of wire in this house before we're through," he boomed. He thought this was very funny.

The first sign of trouble was about a week after we were "on line." The light in the microwave oven began to flicker. Tommy fi-

nally figured out we shouldn't keep the containers of DDD close to the oven. Alice agreed. "The food doesn't seem to be as hot as usual."

We moved the containers to the other side of the kitchen, but a couple of days after that I spilled a lot of my blue DDD accidentally. The phone jangled just as I was getting a pinch to watch the morning news and my arm knocked over the container. Without thinking, I answered the phone, sort of forgetting about the DDD. It was Alice's mother calling to find out if Alice had bought the summer suit she was thinking about.

Just then the cat came in and began sniffing the DDD, some of which had fallen on the floor. Horrified, I yelled at the cat and stamped my foot. Some of the DDD must have fallen on my shoes because there was a faint cloud spreading on the floor. Meanwhile, the cat scampered away and hid somewhere because she had never been yelled at like that. Alice's mother, meanwhile, thought I had a heart attack or something and was calling my name over and over. I assured her I was okay and that I'd tell Alice to call her back. Then I swept up the DDD and put it in a garbage bag. Something told me I should get it out of the house, so I put the garbage bag in a can and took the can out front.

I wasn't at all upset about spilling the DDD. As a matter of fact, I felt pretty good all day. Even felt like laughing at times. And it never occurred to me to call Impeccable.

When I came home, my wife told me there was some trouble with the phone lines in the neighborhood. When I picked up our phone, all I could hear was static. I went next door to my neighbor Tim Fulton's, and he said he was having trouble, too; it seemed that the whole neigh-

borhood was having telephone trouble. I had to go to a drug store two miles away before I found a phone I could use. The phone company said there seemed to be trouble at the central office but they didn't know what was causing it.

When I got home, I noticed that the overhead street light two houses down was flickering. Alice greeted me at the door and when I told her about the difficulty in finding a phone, she clucked sympathetically, "You poor dear, it must have been frustrating. But you don't seem bothered." I pooh-poohed the matter and slapped Alice's backside, laughing uproariously. For me, that's unusual, and Alice's face showed it. But our marriage got better, if you know what I mean.

When the garbage was collected two days later, the phones began working again and the overhead street light was as bright as ever. Somehow, nothing clicked. I guess I was just feeling too good, and I hadn't told anybody about the spill.

About two weeks after that, Penny began getting giggling spells whenever she began watching TV, even when the program was serious. We all thought it was pretty funny and smiled at each other, although a couple of times Penny got to laughing so hard that she choked.

A few days later Tommy began joining in, and then it was Alice and then it was me. And it only happened when we watched TV. But let me tell you, we were one happy family for a while. It didn't even bother us that the bracelet Penny got from Impeccable as a present turned her skin green, that my pocket calculator from Impeccable didn't work and that Tommy's wrist watch "gift" had Fred Flintstone on the face. Alice picked perfume and said it was "very nice," but I notice she never used it.

Last January a very quiet Parter called to say that they were suspending the test temporarily. But they later came and took out all the equipment. For some reason, the guys who picked up the DDD wore masks and gloves. Anyway, we never heard from Impeccable after that. □



media usage other than television. And this is your program attitude questionnaire. You're gonna be a real single source family," Parter finished up triumphantly. Penny's eyes were glowing, Tommy was looking at the ceiling and Alice appeared stupefied.

I wasn't listening to much after the word "harness." It was an oval belt-like contraption with wires coming from it on three sides with each connected to a small box. When I asked Parter what it was, he explained that it made a warning sound when you fell asleep and your head nodded while watching TV. "It's actually not a new idea," he said. "It's a variation of a product made for keeping automobile drivers awake while on the road." He slipped the thing on my head before I could duck. When I did duck, there was a loud beep from one of the little boxes. When I straightened up, it stopped.

"See," said Parter, "it works!"

Annoyed, I snapped the harness off my head, setting off two beeps, each one with a different tone. "Will you please shut this damn thing up!" I yelled. Parter took it from me, shook it once and the beeping stopped. "It's really quite easy to stop the beeps," he commented blandly.

Tommy had begun laughing hysterically, "That's for you, dad, not for me," he said, when he settled down a little. "You're the one who falls asleep when you're watching TV."

I don't like the idea," I growled, embarrassed. "Maybe we ought to forget this whole thing."

Parter, for the first time, got a worried look on his face and said, hastily, "Well, maybe we can forget about the harness. Actually, it's sort of optional. You see, we want to be absolutely sure that we know when a person is actually watching TV. Impeccable prides itself on its reputation for accuracy. But we don't want you to be self-conscious. The whole idea is for you to watch whatever you would normally watch even if you're not being measured." Penny's face showed disappointment.

"How did you pick us, anyway?" I asked.

"Very scientifically, from a com-

puter table of random numbers," answered Parter.

"Then we were picked by chance," snapped Tommy.

"I thought we were special," wailed Penny.

"Let's say you were lucky," responded Parter. "That's something special. Suppose you won a million dollars in a lottery?"

"Speaking of prizes," I said, before Tommy could jump in, "is there any benefit to us for doing what you tell us?"

"Oh, absolutely," said Parter, who smiled broadly, relieved that he could say something positive. He dove into one of the suitcases and pulled out a booklet with colored pictures of dozens of products. "You each get a prize, which you can choose from those marked with 'A,' when you sign up and agree to cooperate. Then ever so often, if

"... Penny began getting giggling spells whenever she began watching TV, even when the program was serious."

you are included in what we call the in-tab sample for three months without a hitch, you can choose a prize from those marked 'B.'" You can get fine watches and jewelry, home computers—all kinds of things. And we pay half of the cost to repair the TV set if it has to be fixed."

"Dad, I think we should ask them to pay the whole cost of repair," Tommy said. "They may damage the set when they hook up the equipment."

Parter looked at me uncomfortably, but didn't say, "No." He hesitated a moment and then said he'd have to check with the home office. I found out later, he got a bonus for signing up what they call a "designated" home. "Incidentally," he asked, "what kind of set do you have?"

"We just bought a new data-grade monitor and tuner, a Moriyama," I said. "We had a Yoshiwara,

but we didn't like it that much. We had a Soki before that for years, but I'm not so keen on them now because our Soki can opener doesn't always work."

"Our Soki knife sharpener is okay," put in Penny.

"I was thinking of getting a Takugawa 25-incher since we have a Takugawa toaster-oven and microwave oven, but I didn't like the shape of their remote control," I explained to Parter.

"We should have gotten a Zenith," Tommy said glumly. We all glared at him.

"Well, said Parter, "whatever kind of set you have, DDD will work."

"What is that stuff, anyway?" asked Tommy.

"I'm glad you asked," said Parter, who sounded like he was winding himself up for a long explanation. Which he was. First, he rattled off the chemical name for DDD, which I forget. Then he launched into its virtues.

"This is one of the most amazing discoveries ever made," Parter declaimed. "The properties of DDD make it one of the most unusual chemicals ever created."

Parter told us, first of all, that DDD was a powder, something like salt, that it was able to generate a signal and transmit it through the air at a fixed frequency, whatever that means, that by adding various proportions of copper, you could change the frequency, that, although it involved radiation it was perfectly safe, that it wouldn't stain our clothes but that heh, heh, we shouldn't add it to our soup.

"Wow!" said Tommy, "Can you send messages with it?"

I had a big question: "How is it used?"

We were told that, once a day, whenever we first sat down to watch TV, we should take a pinch of DDD and rub it on the front of our clothes. "Don't worry," said Parter, "you can brush it right off. The radiation disappears after 24 hours." My wife made some noises about vacuuming the living room, but nobody paid any attention.

Each of us had his own can of DDD, each with its own color. I'll never forget that my color was blue. I think Alice had yellow, Tommy, green and Penny, orange. Parter



Such U.S. successes as "Dallas" are rarely at top of ratings.

Monique Olivier Licht, a Belgian independent producer, is spearheading a petition drive. Licht explains that independent producers in Europe "must struggle to survive because they are always under the shadow of the big U.S. market." She does not, however, limit her unhappiness to the Americans. Licht also laments the intense competition from Japanese and Brazilian program suppliers.

Paradoxically, though, Licht says she and many of her colleagues do not necessarily support quotas, adding that she believes in free trade. Nevertheless, she maintains, realistically and from a business perspective, quotas are crucial to ensure national European productions. American distributors, however, note that U.S. shows are simply not flooding the market. Nicholas Bingham, president of Columbia Television International, as most U.S. distributors, opposes quotas for ideological reasons. While he observes that quotas would not dramatically affect Columbia's European business, "quotas," he believes, "are wrong in principle." Bingham adds that, on a practical level not only do U.S. companies have less than a 50% share of the European domestic markets but that local programming is always more successful.

Experts have always pointed out that even such stalwart American success stories as *Dallas* and *Santa Barbara* rarely are near the top of the overseas rating lists.

Proponents of quotas have several aims. They are primarily designed to preclude the massive importation of cheap American programs and concomitantly to encourage domestic production. But, according to many Americans, quotas could actually be detrimental to local producers. Bingham, for instance, who acknowledges that a great many American programs are available at a relatively low cost, declares that the ability to obtain good and reliable U.S. material inexpensively leaves national net-

works with "much more left over for spending on local productions."

As for flooding Europe with U.S. imports, quota supporters are particularly concerned about the new satellite channels. Sky Television, which broadcasts four separate services, principally to the U.K., could theoretically be affected by the imposition of quotas. Jonathan Miller, Sky director of corporate affairs, says he is very concerned about the directive and its potential effect. Miller says that more than half of the films shown on Sky's movie channel are American, adding, "It would be impossible to run a film service without American movies."

Miller shares Murphy's view about quotas protecting national culture. "Europeans," he says, "have a crazy cultural perception of America being satanic. Hollywood has produced universal stories. Europe feels you can protect your culture by quotas; there is no evidence that it is true or necessary."

While there is some question whether pay-TV channels technically would be affected adversely by the EC directive, most people agree they would. Murphy says that because the directive is so vaguely worded it is difficult to know what would apply. Nonetheless, he believes that services such as The Disney Channel may well be impossible to operate as is done in the U.S. While that may be true, companies such as Disney, have been taking steps for some time to ensure they are not left out in the cold. Buena Vista European vice president for programming David Simon explains that by setting up coproductions with European partners, their films qualify as European productions.

American distributors may be able to take some comfort in the U.K. situation: If quotas are ultimately imposed as they are currently contemplated, British broadcasters could find it easier to transmit American material.

The BBC and the commercial

television stations (ITV) both operate under agreed quotas which limit the transmission of U.S. shows during primetime to 14%. "While other European countries may have to play less American product," smiles ITV deputy director of film acquisition Barrie Wood, quotas actually could result in more U.S. programming being broadcast in the U.K. In spite of the ratings dominance of *Roseanne* on the U.K. alternative commercial Channel 4, however, the program's success will not herald any real change in buying practices. "We (ITV) wouldn't become more Americanized," Wood emphasizes, "but we could, for instance, air more first-run American movies instead of repeating British ones."

BBC's tradition

If ITV offers some hope, BBC doesn't hold out much. BBC general manager of program acquisition Alan Howden doesn't foresee any changes in BBC programming regardless of the outcome of the quota battle. "The BBC," says Howden, "has a tradition of making most of its own programming. We, or independent British producers, supply 85% of the programs we transmit." He adds that the directive would not change the BBC's approach. "It is a matter of choice," he declares, "We believe that it is our duty to produce British programs."

Although it is now unlikely that quotas will be approved, the three-year debate has stimulated a number of tantalizing issues. For some Americans it has been a dispute over trade, for some Europeans a fight over retaining their cultural identity. For others, though, it has created a genuine ideological dilemma.

There hasn't seemed to be many people publicly worrying about the philosophical implications of TV quotas. Beta's (Germany) head of the department for European cooperation, Dr. Christoph Liebscher, is someone who has. How, he asks, can one regulate culture? It may be television today, he muses, but tomorrow it could be books, films, fashions, sports, perfume. Where, he wonders, does it all stop? □

U.S. trade officials say content rules would be subject to legal action

Americans worry about collective Euro quota action

By IRWIN MARGOLIS and ERICA HANSON

Europeans may be forgiven if any are puzzled by the American government's recent entry into the TV quota argument. Regardless of its value, the U.S.' late participation probably came when the chances of a uniform European program import quota being enacted began to appear negligible. Now as the late August deadline for Common Market governmental approval approaches, almost everyone agrees that officials are unlikely to OK the unwelcome directive.

Europeans may be wondering why the U.S. government has suddenly taken a strong position, but despite of all the evidence to the contrary about the effect of possible quotas, there are a number of Americans who are genuinely concerned.

Long-running debate

For the past three years European officials have been debating whether the number of imported TV shows broadcast in Europe should be restricted. Recently, though, just when all European Community governments appeared about ready to work out their differing positions, several European officials effectively scuttled the compromise plan which only called for the origination within EC countries of a majority of programming, when practicable.

So why then has the U.S. government become embroiled in the controversy, warning the ED that the U.S. would consider any European quotas a violation of existing trade agreements. According to James Murphy, assistant U.S. trade rep-

resentative, the government's involvement was prompted by the Motion Picture Export Association, which represents most U.S. distributors, many of whom have been concerned about the prospect of legislative quotas since it was first mentioned.

Although most distributors are not really afraid of the practical consequences of the "compromise" quotas, they are, as MPEA deputy director Harlen Moen emphasizes, "in principal, concerned about the directive because it is a quota."

Murphy accepts that most European countries have had either informal or legal television quotas for years, but this, he says, "would be the first time that any EC collective legal action would be undertaken."

While the Europeans generally see this quota fear as much ado about nothing, U.S. trade officials don't see it that way. As one put it succinctly in officialese: "Our official position is that any content rule is a restriction, and that is a restriction of trade which makes it GATT (General Agreement on Tariffs and Trade) illegal and subject to legal action."

Chris Parlin, legal advisor to the U.S. Mission to the GATT, explains that the U.S. considers television programs tangible goods and therefore covered by the GATT, whereas, he observes, the EC ar-

gues that TV is a service which is not covered by the trade agreement.

Parlin discloses that there already has been a series of bilateral talks on the subject but that so far no formal GATT action has been taken. Nevertheless, he warns that if the quotas become law, "We will put our legal money where our mouth is."

As they have been since the whole debate began, European opinions about the proposed quotas continue to be heated. The Germans and the Danes, as the Americans, are among those who also object to quotas, but not quite for the American reason. They object on the grounds that it interferes with national sovereignty, taking away the right of each country to determine what it wants to broadcast. But the real opposition is French-led. The French already have stringent quotas, having recently ordered TF1, the main French terrestrial network, to reduce its non-European import quota from 40 to 30%. That meant that 600 hours of foreign programs a year, most of them American, had to go. These restrictions were designed to promote and protect French culture and production. In discounting that notion, however, Murphy comments the French are just trying to turn a trade issue into a cultural argument which sounds romantic.

Although at presstime the French were conceding that the EC directive was dead, officials were in the process of preparing a position paper on quotas. It was widely expected that the new French position would be even more restrictive.

For their part, some European independent producers who, in general, do not have worldwide sales aspirations, are vigorously lobbying in support of the quotas.

Ratings success of "Roseanne" won't change ITV buying practices.



series, do good numbers, go weekly and do better numbers and go to strip, as is the case with *Ninja Turtles*. In other words, there has to be a step-by-step deal. The kids' business will have to go either way, be a phenomenon or a step arrangement."

Saban says that despite the hurdles to be overcome, the company is remaining a kids' player in first-run. It will bring *Kissyfur* into syndication as a strip beginning with 1990 season. The package will contain both NBC off-network shows and new episodes as well. A deal is near closing with a major advertiser to help fund the program and to buy time on stations.

Another way to get first-run syndicated kids' programs launched in the U.S. is through coproductions with foreign partners, says Saban. Not only do such partnerships help in sharing the costs by each company, but there is no network to deal with when it comes to creative control. Also, with the production tab outlay less for each in the coventure, the coproducers are not desperate to have the program launched in "prime real estate," Saban notes.

In children's this season, Saban will be represented by two off-network series, the animated *Punky Brewster*, distributed by Claster Television, and *Kidd Video*, a former NBC tenant. *Brewster* becomes a strip, and *Kidd Video* is offered as a weekly half-hour.

Global outlook

But while Saban builds on being a supplier of product for the U.S. market, his eyes basically are cast on the overseas market. "We think exclusively in terms of global television. One of the major reasons we are so widespread when it comes to dayparts is because we want to feed our international distribution. We can't afford otherwise, with license fees and budgets being what they are in today's market in America."

But, Saban continues, "we shouldn't let the tail wag the dog. America is still the biggest market in the world. But, to be honest, I don't know for how long it will continue to be that way." Saban believes the time is fast approaching when a consortium of foreign coun-

tries, such as Germany, Italy and France, will be represented by a single buyer. "That's beginning to happen now, so they will be able to compete for product with America."

In the longform area, Saban stresses the production company is attempting to make pictures that automatically have international appeal, "and we are contacting our partners [such as Edgar J. Scherick] and coordinating with them what to pitch to the networks." Scherick and Saban recently formed Saban/Scherick Productions as a division of Saban Entertainment. The initial undertaking under the S/S banner is *Phantom of the Opera*, four-hour miniseries for NBC.

"You have to keep the networks satisfied to start with. Without the networks, we don't have anything."

Saban says that keeping the networks apprised of projects from the start is important. "You have to keep the networks satisfied to start with. Without the networks, we don't have anything. We do get behind-the-scenes input. For example, a producer of ours is making a picture with one of the three networks. It's a remake of a French movie. For some reason the script was written in America."

But at Saban's suggestion, and with the approval of the network, the movie, a comedy, will be shot in France with American actors, to give it international appeal. Had the network not agreed to shift the shooting of the movie to France, it would never have gotten off the ground, he says. Saban declines to name the movie or the network because contracts haven't been signed. But a major reason for Saban looking to bring the movie's shooting to foreign shores is that it

failed to meet one of his two criteria to help offset high production costs in the U.S.: series spinoff potential or international potential.

The key overall is that the project has to work creatively, points out Saban, rather than it being perceived by viewers as a coproduction or one done overseas.

On the cable end, Saban had no coproduction ties, with the exception of children's product. "I'd love to work for them, and I think the future is bright for cable." But, he says, either the budgets are not on par with the networks' or, in the case of the pay services, "they have the money but want to own the picture and maintain all rights while paying you a fee. I haven't worked for anybody since I was 14 years old, and I'm not going to start now."

What's affordable

"The cable networks get their share when they put the program on their network and get subscriber fees and, in the case of basic, advertising revenues. That's their remuneration. But it's my prerogative to analyze every picture to see whether we can afford it. It's not a question of not being cooperative. If we did 10 pictures for them in a year, at the end of the year we would be losing money. This would mean we might as well shut the production division. We, as an umbrella company, just can't afford not to own the back-end of the movies.

"Also, in many cases, the major services are owned by major studios, whom they generally turn to for making the majority of their pictures. I would, too, if I were them."

Saban's other divisions, Saban Merchandising and Saban Music, are both doing well. Not only is the merchandising end active in promoting and licensing products from the company's properties both in the domestic and international marketplaces, but it's also involved in the development and creation of new merchandising opportunities through its ties with Kenner-Parker-Tonka, Hasbro and Mattel, among others.

At this point, Saban Merchandising is gearing for *Phantom of the Opera* and *Noozies*. □

Saban diverse and global

Claims product in all dayparts; no distribution plans

Saban Entertainment, as run by Haim Saban as its chairman and CEO, is a multilevel entertainment company for all the season's dayparts and is the industry's "global village."

Composed of production, creative, international, music and merchandising entities, Saban Entertainment has action going in each daypart and engages in little without taking a global approach in producing product.

Saban believes his company is the only independent producer of shows that are represented in all dayparts, from daytime kids' programming to primetime to late-night. Other producers have a special niche, he points out, "but our identity is all over the place." In kids', for example, Saban produces *Kissyfur* for NBC, in association with DIC Enterprises and NBC Productions, which enters its fourth season on the network in the fall.

Children's programs

Upcoming for NBC Saturday mornings is *Camp Candy*, starring John Candy in a blend of live-action and adventure. Too, Saban has been supplying cable networks with children's programs such as *Wouser*, on The Family Channel, and for Nickelodeon, *Noozles* and *Grimm's Fairy Tale Classics*, which both return for a second season.

In primetime, for NBC-TV, Saban's latest venture is a two-hour TV movie comedy, *Home by Midnight*, the first project in its distribution agreement with Hoffman/Israel Productions. Saban has worldwide distribution rights to all TV movies and miniseries produced by H/I.

In late-night, Saban Productions will debut *Offshore TV*, comedy/variety series, for syndication in the fall. Distributed by King World, it got good numbers in its test run several months ago.

Saban is leaving well enough

alone in terms of any thoughts of entering the distribution business in the U.S. Saban says he is not planning to set up a syndication venture at this time because to do so would be "suicidal. The first-run syndication business has become very sophisticated," he notes. The sales process is no longer based on relationships, according to Saban. "It's based on creative and aggressive marketing, and on creative salesmanship.

"The days when you went to a station and sold a show on a handshake are over. There is a glut of programming, and you have to be very sophisticated in terms of research and marketing. This could be very expensive. However, this would be justified if there was a library—an underlying cash flow that would fund such a structure.

"So to enter syndication in a professional way, you have to have a library as a strong base to guarantee the expense. It would be ludicrous otherwise." Saban continues that with a solid cash flow, risks such as a *Win, Lose or Draw* or a *Family Feud* can be produced. "This is where the majors are sitting pretty. Also, you can get renewals. Renewals are much easier to get, obviously, than selling an unknown entity.

"This, in turn, generates the kind of cash that allows you to keep a structure in place," to meet the demands needed to market a program today.

Saban's other non-pure kids' first-run syndication involvement has been as producer of *Couch Potatoes*, midseason game show strip for both adults and children, syndicated by Group W Productions. But, according to Saban, the show will not make it into the fall season. While the strip received mostly good preview notices from station reps before *Potatoes* went on the air, it failed to dent the ratings to any noticeable degree because it suffered from rough daypart airings, says Saban.

Saban says the program was very entertaining but that *Potatoes* did not get "prime real estate" because it was an in unknown entity and stations weren't willing to gamble on the show's potential. "They put it on one or two o'clock in the morning in some places, and it was an uphill battle."

Kidvid competition

The kids' syndication arena has become very tough to crack as well, he adds, because of the heavy competition coming from such powerful franchises as Disney, and in the future, Warner Bros. and Fox Broadcasting, which both plan new kids' programming ventures beginning in 1990. Also, continues Saban, heavy competition will come from Viacom Enterprises-distributed *The Super Mario Brothers Super Show*, produced by DIC, and Group W's *Teenage Mutant Ninja Turtles*, both due this coming season, as well as Disney's *Chip n' Dale's Rescue Rangers*.

The glut of kids' programming, not only coming from over-the-air sources, but from basic cable as well, is "mind-boggling," emphasizes Saban. "Today," he continues, "you have to have a huge phenomenon such as *Mario Brothers*, or you have to do a five-part mini-



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Television/Radio Age

July, 1989





With a critical mass, Hispanics no longer feel they have to "go along to get along."

Richard Tobin, Strategy Research Corp.

Texas, when the English were still asking their Indian guides for directions to the Mississippi, to those who just swam the Rio Grande last week.

Diverse lifestyles

That leaves today's market explorers probing both the old lifestyle boundaries of acculturation or assimilation and the more recently discovered lifestyle of "reverse assimilation," or "rooting"—meaning going back to one's Hispanic roots in language and culture.

Isaac Lasky, vice president, Hispanic marketing for W. B. Doner & Co., explains, "More Hispanics who have succeeded professionally now feel a need to rediscover their roots in the Spanish culture and language. Many have also found out that merely having a name like Fernandez or Salazar is not enough to qualify for special minority grants, loans and government contracts. These factors plus the staggering levels of continuing immigration have made the Hispanic part of this country's traditional 'melting pot' more of a bouillabaisse or paella bowl rather than a puree: Instead of the puree's homogeneous gravy, the individual pieces of chicken remain chicken, the shrimp and clams remain whole shrimp and clams, etc., each retaining their own easy-to-see, separate and distinct identities. In our case, these identities are based on national origin; whether we came from Mexico or Cuba or Puerto

Rico, Spain itself, or anyone of many other countries in Latin and Central America."

Richard Tobin, president of Strategy Research Corp. of Miami, reports that to track levels of assimilation, SRC has been asking Hispanics whether they "feel more or less Hispanic" today than before. He says more *have* reported feeling more Hispanic in SRC's recent surveys, and "Our conclusion is that while we formerly assumed continuation of language and other Hispanic cultural ways was maintained only by the continuing waves of new Latin immigrants, now we see it's all the new immigration plus a return to Hispanic ways that are both contributing to Spanish language retention. Apparently, a critical mass of Hispanics has now been built up in the U.S. to the point that there are now so many, they no longer feel like outsiders and strangers who have to 'go along to get along.' Today more Hispanics are proud instead of defensive about their heritage and ways, just as all those bagpipers marching on St. Patrick's Day are just as proud of being Irish as they are of being Americans."

Focus group results

Tobin explains, "We've found from our focus groups that more Hispanics now feel they no longer have to knock themselves out trying to fit into the Yankee culture and lifestyle. Today it's okay to work toward self-improvement the Spanish way. More teenagers are

no longer ashamed of Dad's accent. Even among Hispanics who've lived here 10 years or more, more tell us, 'Today our lifestyle is more Hispanic than it was five years ago.' They say everything is better for them now. That includes jobs, and it includes broadcasting. They have a wider choice of Spanish radio formats to listen to, and the programs on Spanish television are better."

Similarly, Lasky says, "Without solid evidence one way or the other, I'd assume Hispanics who want to relearn Spanish would turn back more to Spanish radio and TV, particularly since there's so much more choice today with two Spanish television networks and more Spanish radio stations than ever. At the same time, the waves of immigration keep growing larger and Hispanic income levels continue to inch up, slowly but surely, every year."

SRC puts U.S. Hispanic median family income today at \$24,700. That compares to \$19,900 in 1985, which was up from only \$14,712 in 1980. Today's U.S. general market median is \$35,600. The only Hispanic segment close to that is Cuban income here, now at \$33,200.

SRC's 1989 *U.S. Hispanic Market* reports 21.5% of U.S. Hispanic heads of household work in white collar jobs as professionals, managers, owners or in technical, clerical or sales jobs, while 53.3% hold blue collar jobs as craftsmen, operatives, service workers, laborers and farmers.

Getting by on Spanish

Tobin also reports "a substantial shift" in the occupations of Hispanic immigrants: "The trend has clearly been moving more toward persons with middle class backgrounds and specific occupational skills."

He adds that jobs are still another factor contributing to Spanish language retention along with reverse assimilation: "There are now so many who own their own businesses. And unlike many Anglo business owners, they're less likely to require new employees to speak English. After all, most of their customers speak Spanish, too. The upshot is, there's less urgency for His-

Latin America's unemployment adds more elements to 'paella bowl'

U.S. Hispanics move to rediscover their ethnic roots

By **GEORGE SWISSELM**

Largest of today's two new groups is the flood of refugees from Central America, some escaping for political reasons.

More Spanish speaking people pouring over the border to swell the ranks of the 19 to 23 million Hispanics already in the U.S. is nothing new. What is new are two additional groups joining the traditional horde of hopeful job seekers.

The vast majority had always been from Mexico until Castro's revolution in the late '50s introduced the then-new element of upper-class Cuban refugees who've settled largely in Florida, with pockets spreading elsewhere along

the East Coast.

Largest of today's two new groups is the flood of refugees from Central America, some escaping for political reasons but most, like those from Mexico, fleeing chronic massive unemployment. The smaller element is from Mexico's educated elite; Mexico's economy is at a point where even many professionals with prestige jobs at home can earn a better living doing menial work north of the border.

Meanwhile those Hispanics already here range from those whose families were already third-generation land holders in California and

In Salinas, Calif., KTGE radio pulls some 20,000 into a retailer parking lot for a Cinco de Mayo celebration.





Spanish commercial for Kodacolor

panics to improve their English if they can get a job without it."

And Tobin points out that the job situation for Hispanics has also improved in more Anglo-owned businesses: "There used to be signs in the employment offices saying 'English only spoken here.' That is, if you don't speak English, don't bother applying. But now antidiscrimination laws in some states, plus just the negative PR of it, has brought these signs down in a lot of companies who've changed their rules."

Saying 'si' on upper scale products

When an agency suddenly wins a new camera account or some new financial services business, the first thing it might think is "upper middle class." If so, more Hispanics qualify in today's little luxuries market, and more companies and their agencies know it.

For instance, that new campaign out of Ogilvy & Mather that just broke in July for American Express Company's MoneyGram consumer money transfer service to anywhere in the U.S., Mexico or Canada, plus 109 cities outside North America, includes TV and radio spots in Spanish. An American Express spokesman points to "a significant market for money transfers, especially from cities in the West and Southwest, from people who work here, back to their families in Mexico."

Similarly, among the many products pitched by *Sabado Gigante* host Don Francisco on Univision affiliates from coast to coast is Polaroid cameras. But competitor Kodak was there first. Marketing executive Dan Matthaideiss says Eastman has added special marketing programs targeted to this country's Hispanics since 1978, "just as we've created special programs for such other market segments as black consumers and for retirees."

Family-oriented. Matthaideiss says Eastman's tracking research looking into propensity to buy and use of photographic products "shows higher incidence of use than that of the general market population. We've found that being very family-oriented, Hispanics have many more family occasions that call for pictures than the general population."

He explains that just as almost everyone calls a gathering of the clan and takes an album full of pictures at weddings, among Hispanics, family events like a baptism or confirmation and a young lady's quinceanero (15th birthday celebration) and graduation are also occasions when the whole family gathers around and flash bulbs pop all over the place. Multiply such occasions by more sisters, brothers and nieces and nephews per family and that's quite a bit of bulb popping.

Matthaideiss adds that even though Eastman's overall theme may be the same in its general market advertising, "that is, highlighting the quality of our color film, we use UniWorld as our agency to speak to Hispanics in their own language and address the close family ties that are the basis for so many of these picture-taking occasions. Our tracking studies of awareness of Eastman and intent to buy shows us that our separate Hispanic marketing effort, which includes point-of-purchase materials in Spanish as well as our Spanish language television, radio and print advertising, not only pays off today—it also represents a sound investment in the future. The continuing rapid growth of the Hispanic market is reflected not only in sheer numbers of consumers but also in terms of consumer spendable income."

Another rule that's changed was the 1986 immigration law devised to penalize U.S. businesses employing undocumented newcomers. However, after its first full year in effect, *The Wall Street Journal* found the Immigration Service had only around 2,000 officers to keep track of millions of employers. Even then, many employers could get around the law, even if caught, if they could claim they themselves were fooled by counterfeit Social Security cards.

What all this adds up to at retail-

ers' cash registers is that U.S. Hispanics currently earn total buying power of over \$171 billion, up over 27% from SRC's 1987 estimate of \$134 billion. In food stores alone, reports SRC, that comes to average family grocery spending of \$97.26 a week.

What it can mean for other retail categories has been tracked in Miami in a study by Pittsburgh-based Marshall Marketing & Communications for WTVJ(TV). The bilingual phone operators handling the interviews found 28.2% of their

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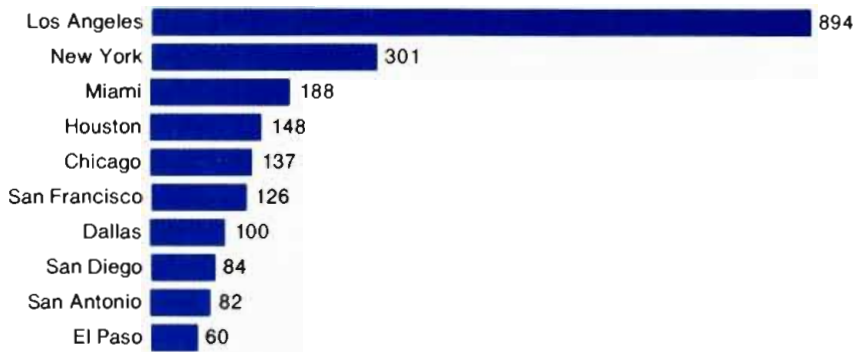
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Ten Metropolitan areas with the largest numerical increase in Hispanics: 1980 to 1985

(Numbers in 000s)



Source: U.S. Bureau of the Census

1,200 respondents were Hispanic, and the research team broke results out by those Hispanics who replied in Spanish and those answering in English.

Language and choice

Clothing purchases in department stores by both groups occurred in such stores as Burdine's, Sears-Roebuck and J. C. Penney, with Burdine's No. 1 among English-speaking Hispanics and Sears topping the list among those replying in Spanish. About 10% of the Spanish speakers shopped at such discount stores as K mart and Zayre. The same stores came out on top among each group when asked where they shopped for Christmas gifts.

Eckerd led the way among both groups for most popular source of pharmaceuticals and health and beauty aids. But the groups split in reporting their second choice stores. More Spanish speakers named Sedano's and Navarro, grocery-pharmacies that cater primarily to Hispanics, while more English-speaking Hispanics reported shopping Publix and Winn Dixie.

The Marshall Marketing study found that slightly more than half of the Spanish speakers don't carry major credit cards, but among the other half, the top five they do carry are Sears, Visa, MasterCard, Burdine's and J. C. Penney. These are also the top five cards carried by Miami's English-speaking His-

panics.

The researchers also investigated media habits, finding both groups heavy TV viewers and radio listeners, but even among the English speakers only 18% reported spending an hour or more a day reading newspapers.

Like higher paying jobs, newspaper reading is often a function of educational level. *Hispanic Business* magazine cites Census data showing that while many more Hispanics are graduating from both high school and college, the proportion of non-Hispanics completing high school and college still beats the 51% of Hispanics over 24 who have completed four years of high school and the 10% who have completed four or more years of college.

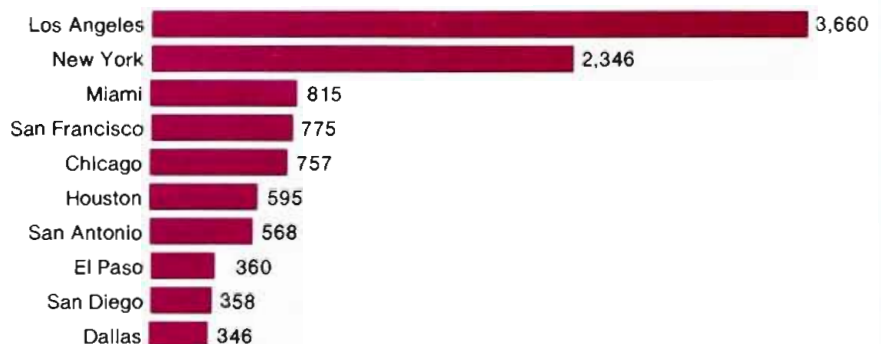
Looking ahead at both education and the swelling tides of immigration yet to come, Eduardo Caballero, president of Caballero Spanish Media, predicts, "In round numbers, by the year 2,000—and that's only 11 years away—Mexico alone will have a work force of 40 million people in an economy that will then offer only 13 million jobs. The other 27 million workers have no place to go for jobs except the U.S."

However, adds Caballero, "It is possible for corporate America to use this problem to solve another. There are many Anglo kids today with the required education who refuse to take many of the jobs available here. The one place American companies can go to find all the willing employees they'll need is the excess work force of Mexico. And the only way to turn these willing workers into the skilled workers they need is for corporate America to get involved in education and training."

Caballero observes, "a few major companies already are. Procter & Gamble is doing this. Jim Duffy at Capital Cities/ABC and David Kearns at Xerox are working in this direction. And as the first Hispanic member of the board of the Advertising Council, I'll be working to impress upon my fellow members what these companies already know: that getting into education is much more than a question of altruism on their part. These companies know they need two things for their own survival and to keep America competitive in world mar-

Ten Metropolitan areas with the largest number of Hispanics: 1985

(Numbers in 000s)



Source: U.S. Bureau of the Census



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Isaac Lasky, W. B. Doner

“More Hispanics who have succeeded professionally now feel a need to rediscover their roots...”

kets, and this is the only way for them to achieve both: more willing, skilled workers and more customers for their products—customer with the education to earn sufficient income to buy even more of their products than they do now.”

The year 2,000 is 11 years down the road. But the seeds could be seen in the '60s and before, and the government's latest official Census data released June 22 tracks some of the key geographic areas of growth through 1985.

Four years ago, according to these “latest” counts in *Population Estimates by Race and Hispanic Origin for States, Metropolitan Areas and Selected Counties: 1980 to 1985*, the number of Hispanics in California grew by 1.3 million from 1980 to '85 and in Texas increased by almost 700,000. Florida over the same five year span added 251,000 Hispanics, New York added 226,000 more and Illinois gained an additional 138,000.

Hispanic concentration

This report shows over half of U.S. Hispanics concentrated in seven metropolitan areas by 1985. Some 3.7 million were in Los Angeles, 2.3 million in New York, and 815,000 in the Miami area. The San Francisco market was home to 775,000, Chicago had 757,000, Houston 595,000, and 568,000 were counted for San Antonio.

This count also shows that each metro area that was home to at least 10,000 or more Hispanics in 1980 had an increase in Hispanics

between 1980 and '85. In half of these areas, Hispanic population climbed by 20% or more. And by 1985, 40 metro areas were at least 10% Hispanic. And Hispanic population jumped by more than 100,000 between 1980 and '85 in four counties. These were Los Angeles County which added 666,000; Dade (Miami), 170,000; Harris (Houston-Galveston), 122,000 more, and Cook (Chicago), adding 113,000.

These are among the key growth markets. Carlos Montemayor, president, Montemayor & Asociados, Inc. of San Antonio, observes, “More major advertisers are following Campbell Soup's lead in researching regional differences. When they do, one of the first things they see is these large and fast-growing pockets of Hispanic consumers through the Southwest

Dr. Henry Adams-Esquivel, MDI



The growing ranks of middle-class arrivals will be bilingual and bicultural.

and extending from Florida to major markets in the Midwest and Northeast.”

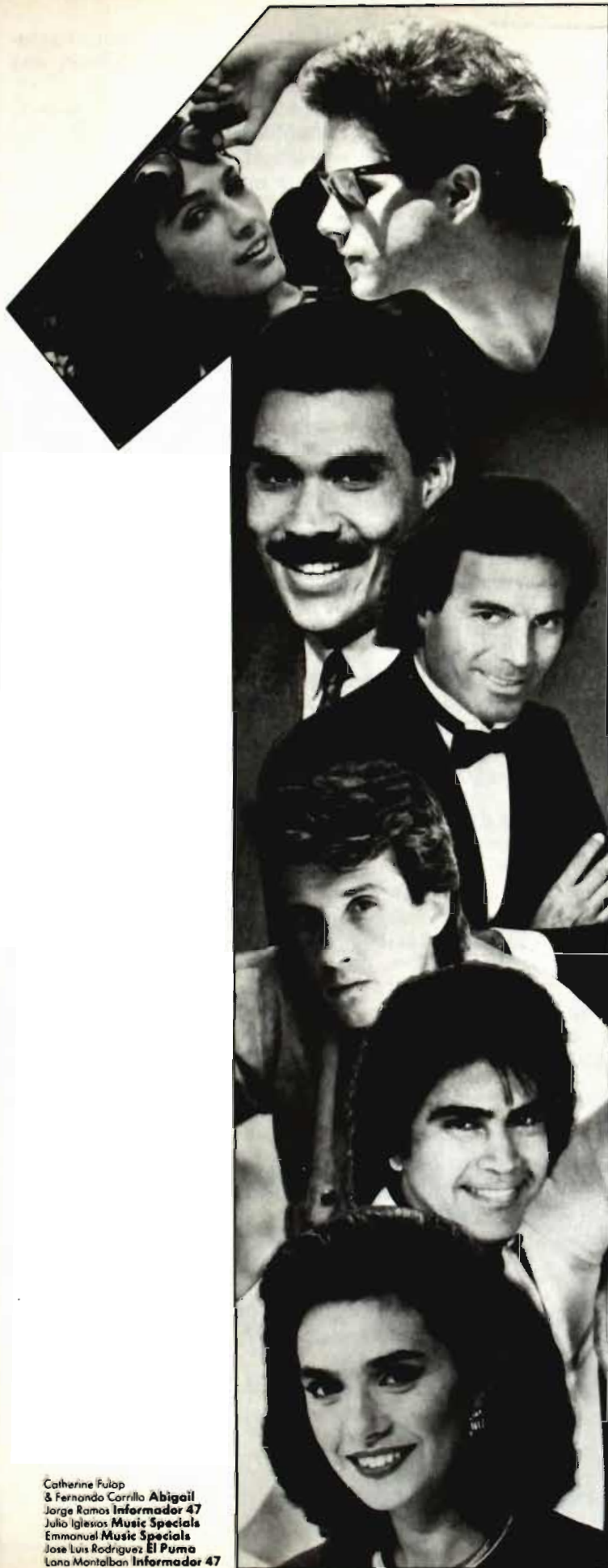
Another result of such research, adds Montemayor, “is the growing sophistication of more advertisers looking into our market. We can see this in the kinds of questions they ask us. We see that many more companies are now aware that Hispanics here in San Antonio are different from those in Los Angeles and that those in Los Angeles are different from the Spanish-speaking people in Miami or New York and Chicago.”

New advertisers

Similarly, Doner's Lasky points out that while “Most major corporations already understand the growing importance of the Hispanic market now, for the first time, we're seeing more medium-sized companies giving our market serious consideration. Regional chains like Highland Super Stores [electronic household and entertainment equipment and appliances], Shasta soft drinks and Colt 45 malt liquor are starting to explore the potential of our market. I think in the next few years we'll see this snowball, with more and more of these not-so-huge brands, retail chains, HMOs and banks coming on board.”

Marketers can also see more research on the Hispanic psyche and lifestyles that brings the knowledge level closer to what they've come to expect in the general market.

That Marshall Marketing study



Catherine Fulop
& Fernando Carrillo **Abigail**
Jorge Ramos **Informador 47**
Julio Iglesias **Music Specials**
Emmanuel **Music Specials**
Jose Luis Rodriguez **El Puma**
Lana Montalban **Informador 47**

ONE-DERFUL!

For 17 straight years, WNJU 47 has been the #1 Spanish-language television station in New York—sign-on to sign-off.

Since 1972—and again this year—WNJU 47 has dominated the New York Hispanic market.

Now, as the flagship station in the Telemundo network, and with exciting and innovative programming such as the new novela, *Abigail*, the domination is as strong as ever.

The fact is, for an advertiser to cover the New York Hispanic market, Telemundo's WNJU 47 is a must.



**WNJU 47 NEW YORK
TELEMUNDO**

Without Us, New York Wouldn't Be New York.

Source: Arbitron 1972 through 1989 to date.

for Miami's WTVJ, for instance, included psychographics broken out by SRI International through its VALS 2 program. These findings show that Miami's English-speaking Hispanics tend to be action- and status-oriented, and more than 27% of them are "experiencers." Experiencers are "extroverted and unconventional" people who like new, offbeat and risky activities and who enjoy exercise and the outdoors. They're likely to jump on the latest fashion fad and spend much of their disposable income socializing. The experiencer's median age is 26, most are in entry-level white collar or craft jobs and many are completing their education.

Miami's English speaking Hispanics were also found to include many of VALS' "achievers" and "strivers." The striver's median age is 34, and although "status oriented," he or she usually holds a blue collar or service job. The achiever's median age is 36, most are college graduates with white collar jobs, and their lives "center on career and family, avoiding extreme change. Achievers are self motivated, while strivers look to their peers for motivation and approval. As consumers, achievers prefer premium products and will choose from a wide variety. Strivers are image-conscious and will spend

for clothing and personal care items."

But when Marshall Marketing applied VALS 2 to Miami's Spanish-speaking sample, it turned up "an entirely different kind of consumer. They are principle-oriented, and a third of them are "believers." A VALS believer has a median age of 58 and tends to be "traditional, cautious and moralistic. Many are homemakers or retired persons, socializing with family and established groups is very important to them, and they are politically conservative and work hard to keep themselves reasonably well informed. Believers are loyal and predictable consumers who hunt for bargains, use coupons, make lists and send in warranty cards. They watch more television than average but don't change buying patterns easily and rely on the advice of friends when making product choices."

Also probing Hispanic lifestyles and psychographics is Hispanic Monitor, a joint venture of San Diego-based Market Development Inc. and Yankelovich Clancy Shulman. Their most recent findings support those that SRC's Tobin and Doner's Lasky point to when they talk about "reverse assimilation" or "rooting."

Dr. Henry Adams-Esquivel of MDI has come up with what he de-

scribes as "nine attitudinal dimensions that drive the U.S. Hispanic market and the four key consumer clusters they define." These are described in *Hispanic Psychographics: Some Key Findings from Hispanic Monitor*, fifth in a series of transcultural "white papers" resulting from the company's research.

Two of the four consumer clusters, found primarily among the foreign born, are identified as "hopeful loyalists" and "recent seekers." The other two, "young strivers" and "established adapters," are primarily U.S.-born.

Growth and reinforcement

Dr. Esquivel explains that the continuing rapid growth of this country's Hispanic population "supports development of a wide range of Spanish-language media appeals and targeted marketing opportunities. Since high-density Hispanic markets are generating business opportunities to meet unique Hispanic consumer needs, the number of opportunities Hispanics have to communicate in Spanish, and more importantly, to manifest Hispanic attitudes and value systems, is also growing. The result is massive reinforcement of the less overt, but very vital aspects of Hispanic language, attitudes, values and beliefs.

"Hispanic population growth should at the same time provide Hispanics here with an increased sense of security in the U.S. This will tend to reduce the pressure to abandon those aspects of their culture they want to retain."

And noting the growing proportion of Hispanic newcomers from urban and middle class backgrounds, Esquivel predicts, "Increasing numbers of Hispanic immigrants will exhibit the phenomenon observed among Cuban-origin Hispanics in Miami: The higher one's socio-economic status before immigration, the more one is able to be selective about the attitudes, values and beliefs one adopts from U.S. society. Middle class migrants have the benefit of, and the resources to create, a truly bilingual and bicultural approach to life and in turn transmit it to their children." □

Carlos Montemayor



"More major advertisers are following Campbell Soup's lead in researching regional differences."

BETWEEN 1990 AND 2010, HISPANICS WILL ACCOUNT FOR 42% OF NEW POPULATION GROWTH IN THE UNITED STATES.

- U.S. CENSUS BUREAU

In 2010, there'll be nearly 40 million Hispanics in the U.S. More than double today's total. And now is the time to establish your franchise with this increasingly important market.

Already, U.S. Hispanics have \$171 billion in purchasing power. And that's just the beginning. Over the next couple of decades, that figure is going to go through the roof. If you

want your sales to do the same thing, now's the time to contact your UNIVISION sales representative.

UNIVISION makes it so easy to break into this exploding market. We cover 85% of the country's Hispanic households. In fact, we come 75% of Hispanic TV households in one week.

Most important, we talk their language. Spanish is

the first language of 94% of Hispanics in this country.

Maybe that's why 25 of the top 25 national advertisers advertise on UNIVISION. We're far and away the most effective Spanish-language advertising medium in the country.

For the best in Spanish-language news, entertainment, children's, sports and variety programming, there is only one television network.

UNIVISION IS HISPANIC-AMERICA'S TELEVISION NETWORK.™

New York (212) 826-5200; Chicago (312) 944-2199; Los Angeles (213) 859-7200; San Francisco (415) 392-2006;
Dallas (214) 869-0202; Detroit (313) 540-5705; Miami (305) 444-0800; Orange County (714) 474-8585

Hispanic radio multiplies

Tougher competition breeds professionalism

More radio stations are speaking Spanish, a few of them on FM for the first time. And of these estimated 200 or so radio stations, more of them are offering a wider variety of musical formats than ever, and many continue to offer listener-grabbing contests and other tie-ins with Hispanic holidays and local festivals they've long made available to their advertisers. And the Spanish radio reps, now numbering five, say the tougher competition is making their stations sharper and more professional in every aspect of their operations from programming and promotion to community service and sales.

Eduardo Caballero, president of Caballero Spanish Media, reports more new Spanish language stations coming on line as well as more existing Anglo formats switching to Spanish.

Caballero himself recently signed 24-hour WBIV Boston and KXMK Arizona City, located between Phoenix and Tucson, and, he says, "strong enough to reach almost 100% of Arizona's entire Spanish speaking population."

Other new or building Spanish-language stations Caballero will sell for include 10,000 watt WOPA Chicago; KOQO AM-FM Fresno

and KWIZ Santa Ana-Orange, both in California; and WAOS Atlanta. The latter, notes Caballero, "is significant because Atlanta is not traditionally thought of as having enough Hispanics to support Spanish language broadcasting."

Still others Caballero will represent are WCUM Bridgeport, Conn.; KJME Denver; WONQ Orlando; WYIS Philadelphia and two FMs in Texas, KBOR(FM) Harlingen and KCTM(FM) Rio Grande City. Caballero also says New York could get a second Spanish speaking FM besides Spanish Broadcasting System's WSKQ-FM.

The latter was one of the existing stations, formerly WEVD(FM), that switched from English to Spanish when it was acquired by SBS last year. Julio Omana, head of SBS' rep division, says WSKQ-FM "is bringing back a lot of listeners who had previously lost interest in Spanish radio when New York's Hispanic listeners had only AMs. Our new FM has done so well it may soon boost Spanish language radio in New York to the point where it rivals that in Miami. There our stations do so well we get in on a lot of the general market buys as well as the specifically Hispanic-targeted buys. On the other hand, that may not be too unique when we consider that in Miami, Hispanic is the general market: Hispanic is 50% of the population, black is 20%, and that leaves Anglo with 30% to our 50%."

Julio Omana, SBS



Rick Kraushaar, president of Lotus Hispanic Reps, observes, "Spanish radio has had no choice but to steadily keep improving. We've had to, to compete not only with ourselves as more Spanish language stations have gone on the air, and as more stations that formerly carried English language formats have switched to Spanish, but to compete, too, with all the other avenues of advertising to Hispanics that have opened up to advertisers. Today, besides Spanish radio, we have television, cable, outdoor, transit, and more magazines, including a national supplement carried by newspapers like *Parade*, and also in English, but edited to meet the interests of bilingual Hispanics."

This, says Kraushaar, "has forced all of us, broadcasters and reps, to stay on our toes and maintain a high level of professionalism in every aspect of our operations." He says that at the stations, professionalism translates into "no longer playing just any music, so long as the beat is Latin and the lyrics Spanish. Today a station's sound has to be fine-tuned to individual market tastes. Listener preferences in Los Angeles are different than those in Miami. And both differ from the musical styles preferred in Texas or New York."

As an example of many stations upgrading their facilities, Kraushaar points to KWKW Los Angeles: "It was 5,000 watts, days, but

Expects New York's first Spanish FM to boost the city's Hispanic radio to the level of Miami's.

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#2 in Prime Time*

#2 in women 18-49.**

Super 7 (WSTE-TV) is
the #2 T.V. station in Puerto Rico
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*Mediafax, May 1989/Monday-Friday, 6:00 - 10:00 P.M.
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#2 IN PRIME TIME



SuperSiete
WSTE · PONCE · SAN JUAN
Lo nuestro está contigo... todo el año.



Eduardo Caballero, r., Caballero Spanish Media, elected first Hispanic Advertising Council board member. At l., John Pepper, pres., Procter & Gamble. C., Ad Council pres. Ruth Wooden.

cies keep requesting more information on the market and on Spanish-language radio."

She notes, "Since Texas State Networks' SIS—Spanish Information Service—started in Texas, that's where 25 of our 42 affiliates are. But we've expanded and now have affiliates in all the major Hispanic markets outside Texas, too. We're in Los Angeles, San Antonio, Miami, New York and Tampa. For instance, we have seven affiliates in California, two in Arizona and three in New Mexico."

Meanwhile, Lotus' Kraushaar reports his new *Radio Noticias USA Today*, which hit the air in May, already carried by 30 sta-

tions. Produced in partnership with *USA Today* publisher Gannett and its worldwide news gathering operation, the five-minute news casts currently air during morning drive at 7, 8 and 9 a.m. Come third quarter, Lotus and Gannett plan to extend this to afternoon drive, with probably two more newscasts at 5 and 6 p.m. Kraushaar says each newscast gives the major hard news, "But much of it is also sports, personal financial management and contemporary lifestyle items, in line with the content of *USA Today's* four newspaper sections." McDonald's is already on board as the news service's first sponsor, and Procter & Gamble is reported "interested."

At the same time, United Press International has replaced its barter Spanish language radio network with a new syndicated news service. One initial result was that 13 of its 38 affiliates are now ex-affiliates. But David Haymore, UPI director of sales, Spanish services, says the defections were due to the switch catching the stations by surprise—a surprise the dropouts hadn't budgeted ahead for. He says he's confident most will return to the fold "because we've seen good response from our other affiliates who see our new arrangement as a small price to pay for no longer having to worry about us selling their inventory to the same agencies they have to rely on for their own revenues."

Haymore adds, "We'd invested for five years in our barter news network and found it tough to compete against other networks letting their affiliates' time go at very low rates. But now, under our new arrangement, many more listeners will be able to hear UPI news in Spanish. Now that we're sold to stations on a subscription basis, we're no longer exclusive to only one station in each market. Now Hispanic listeners will have a choice of stations carrying us in some markets. It also means we can expect our affiliate list to grow dramatically over the next few months."

Range of programming

At Cadena Radio Centro, New York sales manager Linda LaPlant reports affiliates in 22 markets, "including the top 10 Hispanic markets. The 22 covers 80% of Hispanic U.S.A."

She says news is only one part of a 24-hour-a-day network feed that includes sports capsules and music programming including a Top 30 Hispanic hits countdown on Sundays. She adds that Cadena also has a syndication division that offers more music plus features such as medical and health tips, and that Cadena "can build a program for a participating advertiser and place it on a barter basis."

LaPlant also reports "Business improving," and says, "Each

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1,000 watts at night. Now it's 5,000 watts both day and night."

But because of the growing competition from all directions, print and outdoor as well as more Spanish speaking radio and TV stations, Kraushaar also points out that Spanish language radio budgets aren't keeping up with the availabilities.

Hispanic Business magazine estimates that national advertisers invested some \$44.9 million in Spanish language radio last year, with local advertisers placing \$131.1 million, for a total of about \$176 million, up from approximately \$130 million in 1987.

So Kraushaar sums up, "It's been a tough year but a good year in the sense that we and our stations are sharper for it. For instance, here at Lotus, Millie Colon runs a full-service research operation and we now subscribe to both Birch and Arbitron. That gives our stations the additional advantage of Birch's qualitative information."

For a quick idea of what more Spanish language radio operations around the country are doing, Chicago's WIND is among a number of stations simulcasting the local news reports of an English language television station, in WIND's case, WMAQ-TV, so listeners can watch the pictures on TV and hear what they're about on radio, in Spanish.

Addressing issues

And in Houston's *Hispanidad* magazine, general manager Gary Stone of Tichenor's KLAT describes how his program, *La Voz del Pueblo*, will often devote a full week to one such issue as the dropout problem or drug and alcohol abuse. KLAT also airs regular PSAs about the educational crisis due to the high dropout rate, and Stone says the station's public affairs director, Arturo Sanchez, visits Houston schools to talk to the kids about the importance of sticking it out. Stone is particularly proud of its \$50,000 scholarship program in conjunction with the University of St. Thomas. KLAT asks the scholarship winners to "act as role models for other students, telling them how they stayed in school, got a scholarship and



Gene Bryan, Katz Hispanic

made it to college."

To Gene Bryan, vice president, national sales manager of Katz Hispanic Radio Sales, it looks like, "The Japanese, even a few European car makers, but most of all Americans, including Americans in Detroit, are rediscovering America. In the process, they're seeing a lot of people they overlooked the first time—all the people who speak Spanish."

Even so, though, Bryan concedes there are many companies that still don't recognize the market potential of the fast growing Hispanic population and says, "It's up to us in the media to educate these companies. We've found our best educational tools for this job are research and more research. Advertisers and agencies have seen Univision and Telemundo come up with more research, and they expect the same from radio. So we deliver. We keep coming up with more information, not only for the Spanish language specialist agencies who already know the market potential we're working with because they're part of it, but also for the general market agencies. A lot of them are already buying the top Spanish markets, from Miami to Los Angeles, but missing half the market if they're forgetting the Spanish-speaking half."

Bryan notes, "For just a couple of examples, in San Antonio, just over half—51% of 18-34 is Hispanic. In Miami it's more than just con-

"We've found our best educational tools for this job are research and more research."

sumers. In Miami many businesses—even banks—are Hispanic-owned. And all this is trackable with research. We use the research, on top of the growing stack of success stories in a wide range of categories to show more companies that if they aren't using Spanish radio yet, they're missing the boat because their competitors are usually with us."

New kid on the block

Newest kid on the Spanish radio rep block is the CBS Hispanic Marketing Division of CBS Radio Representatives. Division manager Yvonne Ruiz reports business "very good since I started here in March. More advertisers and agen-

The logo for Cadena Radio Centro, featuring the letters 'ERC' in a stylized, bold, outlined font.

Cadena Radio Centro

**National Satellite
Coverage**

Post Analysis

Full Service

SALES: (212) 682-0330

Promotions go for long haul

Radio stations get their share of the action

Some ad industry watchers looking at the general market believe the shift in recent years of more marketing dollars out of media advertising and into promotion may have peaked at its currently estimated 60% level. Meanwhile, Eduardo Caballero, president of Caballero Spanish Media, suggests the same may be happening in the Hispanic market and warns that "some companies may be overdoing things."

Caballero says he would discourage neither advertisers nor stations from doing a promotion "that could somehow increase consumer brand loyalty permanently—if such a promotion can be invented. On the other hand, I don't encourage anyone to undertake promotions that increase shelf movement only during the brief two to four weeks of a typical radio campaign, only to see this increase disappear as soon as the promotion disappears."

He says station promotions "may work effectively in the general market, but to be effective over the long term among Hispanics, advertising should make us feel we're being invited to try a brand on its merits, because of its own natural or built-in quality, rather than being pitched to try it only because it's temporarily being offered for a

few cents less."

Nevertheless, Carlos Montemayor, president of Montemayor & Asociados, Inc., San Antonio, reports, "We continue to see more advertisers switching more dollars away from straight media advertising to promotion, just as they do in the general market." Montemayor should know. His agency has conducted everything from a South Texas menudo cookoff for Bush Brothers Canned Foods to tortilla promotions and Mother's Day promotions for Pepsi-Cola. And each of these promotions included heavy radio station involvement.

The Mother's Day promotion alone netted both Pepsi-Cola and Frito-Lay additional shelf space plus end-aisle store displays in each of Houston's 16 Fiesta Mart Stores. Between 7,000 and 10,000 shoppers registered to win *Queen*

for a Day prize packages, ranging from a coupon good for a visit by a house cleaning service to a family dinner out, a professionally photographed family portrait or a coupon good for \$25 worth of merchandise at J. C. Penney. Backing all this were radio schedules on four Houston stations that included commercial spots, promotional spots and tags on existing 60-second Pepsi spots. The bottom line was an 86% sales jump over last year's sales during the comparable period.

In Salinas, Calif., participating retailers reaped another impressive sales boost. KTGE organized a two-day Cinco de Mayo celebration complete with music groups in the big parking lot shared by Albertson's subsidiary Monte Mart and Family Bargain Outlet. The festivities pulled a crowd estimated at

From Spanish Broadcasting System, "La Casita" (Little House) boosts advertiser profiles in supermarkets.

"La Casita": coming to New York and Los Angeles



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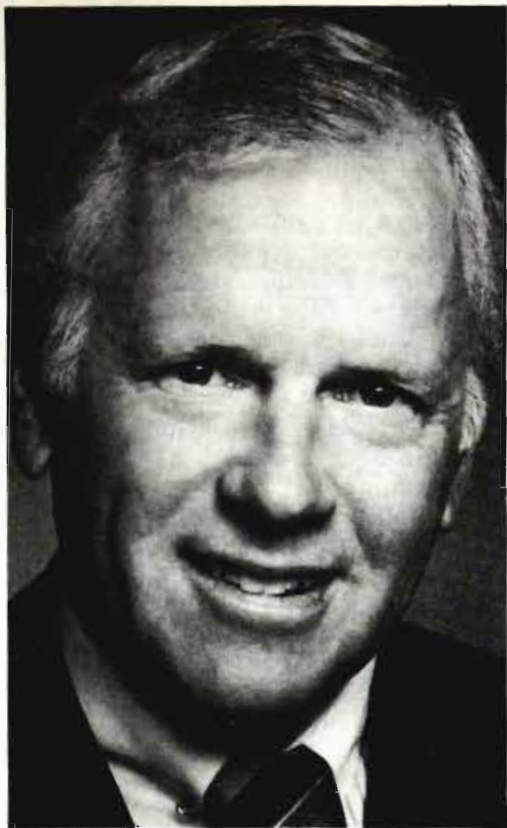
Cadena Radio Centro

**National Satellite
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Rick Kraushaar, Lotus

Because of growing media choices, Spanish radio budgets aren't keeping up with availabilities.

month, more and more advertisers are coming to recognize that the majority of Hispanics prefer to be talked to in Spanish."

She notes that "Many major companies have recognized this for years. But today many more smaller companies realize it too. One result is that in just the last 60 days we've had more planning requests and avails requests than we'd seen in the previous six months."

And Katz's Bryan points out that "Spanish language broadcasting keeps getting better because major companies are investing in it, providing the capital to compete against general market stations on a level of equal quality."

Bryan adds, "When other companies see companies like Tichenor, Heftel, Hallmark and Reliance investing in Spanish language stations, they know there has to be a good reason. This adds to their confidence level in Spanish language broadcasting and in the job we can do for them."

Bryan also notes, "Hispanics, like everyone else, have always bought the necessities like food and clothing. But today they buy cameras and cars. In Miami they wear Rolex watches and drive top-of-the-line models."

He also points out that in many general market agencies, "Radio is still a stepchild to TV. But because they're part of it themselves, the Spanish specialist agencies don't see it that way. They don't just 'know': They feel in their bones the key part music plays in the Latin culture and lifestyle. And radio is the music that's always with them." □

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hibitors last year included over a dozen KCOR advertisers. Among them were Pepsi-Cola, Miller Brewing Co., Colgate-Palmolive, Del Monte Foods, Avon Products, KMOL-TV San Antonio, area Lincoln-Mercury dealers, McDonald's, Quaker Oats, Old El Paso sauces, Uncle Ben's rice and the San Antonio Spurs.

Besides exhibitors' booths, there's continuous entertainment by Latin musical and dancing groups from noon to 11 p.m. Meanwhile, leading up to the fair, exhibitors get 500 advance announcements on KCOR, exhibitor credits on over 1,000 posters and in full page ads in three San Antonio newspapers, a full page in 5,000 copies of the fair's souvenir program book, and on-air exhibitor reference during KCOR's own remotes from the fairgrounds.

In-store tools

And from Spanish Broadcasting System, *La Casita* (Little House) is coming to New York and Miami. That's not *Little House on the Prairie*. That's Little House inside big supermarkets to boost participating advertisers' profiles at point of purchase.

Actually, *La Casita* is a package of marketing tools offered by SBS Promotions, the new sales promo-

tion and merchandising subsidiary formed by Raul Alarcon's SBS to give advertisers more sales punch with their radio schedules. Marketing director Marv Rubinek reports *La Casita* has already been working in Los Angeles to build up participating brands' store franchises.

He says his people manning each *La Casita*—"about the size of a Fotomat kiosk"—offer supermarket shoppers samples of the participating brands and coupons for more of it. And he says that because this builds brand demand, "The stores order additional cases and set up end-aisle displays to support the featured brands. And shoppers visiting our little houses also get a chance to enter a contest to win a new car. And since the shopper fills in her name and address on the entry blank, we're also building a mailing list of Hispanic consumers that our participating advertisers can use for their own direct marketing programs. The whole package is supported on air by spots on our SBS station, KSKQ in Los Angeles."

Rubinek says these spots presell *La Casita*. "They tell our listeners they can get free samples and money-saving coupons and a chance to win a shiny new car this week at Vons or Albertson's or Tianguis—whichever chain *La Casita* is in this

week. The stores also get window banners and posters that feature the participating brands and announce '*La Casita* will be here next Monday. Come in and try your luck on the new car we'll be giving away.'" He adds that the culmination of all this, after *La Casita* has moved over the course of several weeks through the stores of all chains with stores in Hispanic neighborhoods, is a big street fair or outdoor festival in a big park. *La Casita* is there, the participating advertisers are there, and so are music groups, dancing, more product sampling, and finally the grand drawing is held for the car.

Rubinek says *Casita* participation is sold by the quarter. Seagram's wine cooler, for instance, is in for the summer when cooler consumption is highest and the time ripest for pushing more cases through the stores. Then in the fall, Tylenol will start up with the return of the flu season.

Rubinek says, "While our radio stations continue to call at the agencies, my job is to work directly with our advertisers' own marketing people, brand managers and regional distributors on event marketing that extends the impact of the client's radio schedules with intense merchandising, contests and promotion." □

Coverage of national day parades and parade or float sponsorship with advertisers is a popular form of visibility.



over 20,000, a camera crew from Univision affiliate KSMS-TV came over from neighboring Monterey to cover the fun and KTGE says that over the two days the two stores "grossed over \$2 million in sales."

Lip sync contest

Almost 100 miles to the northeast, KLOC Modesto raises college scholarship funds for Hispanic high school seniors with its annual lip sync contest. General manager Mike Sturtevant describes it as a Spanish version of the game played on television's *Puttin' on the Hits*. And since 1987 KLOC has brought the high schools' principals into the act. Sturtevant figured that with the principals from Modesto, Stockton and Merced competing against each other for scholarships for their Hispanic students and enlisting the kids in their routines, it would get these principals, who spoke no Spanish, working on a project that would get them a lot closer to their students. It did. The kids picked songs, from rockers to traditional Spanish, that required many hours of rehearsal. The first time out with the principals, the event raised \$9,000 in scholarship funds and generated enough excitement to make the local newspapers, complete with photos. With that kind of high visibility, Sturtevant says, he already has sponsors lined up for next year who've pledged a total of \$30,000 to KLOC's scholarship fund.

Meanwhile, Houston based Boone DeLeon Communications is credited by *Hispanidad* magazine with a number of successful promotions. In just one of them, the agency organized a 10-game soccer series across the U.S., pitting the U.S. Olympic team against the top national teams of Columbia, Chile, Costa Rica and Ecuador. This was sponsored by Procter & Gamble for five of its brands, and shoppers could buy soccer tickets at half price with proof of purchase of any of these participating brands.

Rick Kraushaar, president of Lotus Hispanic Reps, says that on top of offering the special promotional opportunities Spanish language radio stations have long been noted for in connection with the various



WIND(AM) Chicago does Cinco de Mayo broadcast from Taco Bell.

Stations are discouraged from doing promotions that only increase traffic for a week or two.

national holidays, "Today they've added contests and other special promotions designed to move their advertisers' products off of the store shelves. And in many cases the promotion dollars are in addition to their straight media budgets."

Adapting ideas

Kraushaar also points out that, as a rep working closely with 81 radio stations in the U.S. plus a dozen more along the border and in Puerto Rico, "We're in a position to see what kind of promotion works best at one station so we can suggest an adaptation of the same basic idea but geared to other markets and clients. A new stunt or contest then becomes a 'new product' we can roll out from a success in one 'test market' to others.

"Good ideas that work can then become part of the station presentations we develop, along with our research facts and figures, for local food chains, for auto dealers, or for any other category. Our pooled information sharing among all our

rep offices also shows us what kinds of research are most effective in persuading each different retail category to come aboard."

Coverage of national day parades and parade or float sponsorship, with advertisers on board or sponsoring their own separate floats, is another popular form of high station visibility. In Miami WQBA AM-FM has been sponsoring the Three Kings parade there for almost 20 years as a form of defiance to Fidel Castro's abolition of Christmas celebrations in what many Miamians think of as their homeland.

In New York, Art Gordon, sales manager of United Broadcasting's WKDM, says his station and several of its advertisers participate in some 10 national day parades a year, the largest being the Puerto Rican Day Parade in June, which drew a crowd estimated by *The New York Times* at 1.5 million parade watchers.

In San Antonio, Tichenor's KCOR calls its annual Hispanic State Fair "the greatest Hispanic show in Texas." Participating ex-

Controversy continues to enliven Hispanic ratings scene

Hispanic audience measurement of TV and radio continues to present a lively scene, with four competitive methodologies in the picture. One of them, Nielsen's people meter, is yet to be thoroughly tested in a Hispanic environment, but the other three—Arbitron's diary, Birch's telephone recall technique and Strategy Research Corp.'s door-to-door method—are generating or preparing to generate reams of data.

So far, there is no consensus on which methodology is best for measuring Hispanic broadcast audiences, though Birch has the distinction of being the only service to receive the imprimatur of the now-defunct Spanish Radio Advisory Council, which favored a telephone technique. (See also *The Hispanic Market*, TV/RADIO AGE, Nov. 14, 1988, page A36.)

The long-drawn-out negotiations on a people meter contract between Nielsen's lawyers and those representing the two major Spanish TV networks—operated by the Telemundo Group and Univision Holdings—appear to have ended. Work may have already begun on the preliminaries of a Los Angeles test to work out the wrinkles of a national people meter service. The L.A. test will involve 200 households and the national sample, subject to the test, will be around 1,000.

Cost of service

Latest estimates of the cost of a national Hispanic network service have raised the ante. The tab is now put at around \$35 million over five years. An earlier estimate was \$25 million over five to seven years.

Signing of the contract will revive the activities of the Spanish Television Research Committee under the chairmanship of Norman Hecht, head of Norman Hecht Research Inc., which includes representatives of both networks. The STVRC had been superintending the project before the lawyers got into the act. Doug Darfield, vice president and director of research for Univision and an STVRC mem-

ber, reports that the group plans to open the review process to outside users of the audience data.

Arbitron, which reports on Hispanic viewing separately in nine markets, is in the throes of expanding its Hispanic Local Market Reports (HLMR) for radio, which it kicked off last year in an effort to fight off Birch. In doing so Arbitron is reviving a service. The HLMRs are retabulations of Hispanic data from Arbitron's general market radio reports, as are TV reports, which have been turned out for many years. Audiences in four markets were tabbed during the summer/fall period in '88 and, starting this month, the total will be increased to 16 markets. To be reported on twice a year are Chicago, El Paso, Houston-Galveston, Los Angeles, McAllen-Brownsville, Miami-Ft. Lauderdale-Hollywood, New York, Riverside-San Bernardino, San Antonio, San Diego and San Francisco. Slated for one report a year are Dallas-Ft. Worth, Fresno, Monterey-Salinas-Santa Cruz, Phoenix and Tucson.

Pretty much the same 16 markets are being measured by Birch, which, however, supplements Hispanic respondent data from its general market Quarterly Summary Reports with Hispanic respondents in high density Hispanic areas (HDHAs). Samples range from 1,000 to over 2,000 respondents.

The third round of Birch's revised Hispanic Target Market Report Service (HTMR) was published this month, covering the December-May period. The first set of reports with modifications to meet SRAC recommendations came out in early December and covered the summer/fall period. The second set, with September-to-February data, came out in early April.

Subscriber activity

Tom Birch, chairman/CEO of Birch/Scarborough Research, reports that there are "about 40 to 50" subscribers to the HTMRs, including six stations. Most of the subscribers are agencies, but three

of the major Hispanic reps—Caballero, Lotus and Katz—also buy the service. SRAC endorsement has been a major factor in attracting HTMR subscribers, Birch says. The research chief adds that he expects two additional markets to be added shortly but won't reveal which ones for competitive reasons.

In March, Birch set up a Hispanic Technical Advisory Board to act as "a private sounding board" regarding methodology. So far it consists of one advertiser, agency, broadcaster and rep representative: John Taylor of Procter & Gamble, Monica Roslow of Conill Advertising, McHenry T. "Mac" Tichenor of Tichenor Media System and Eduardo Caballero of Caballero Spanish Radio.

More reports

A pioneer in Hispanic broadcast audience measurement, Strategy Research Corp. will be measuring 15 markets for local TV reports this year, up from 12 last year, and will field three national TV studies, up from two in '88, according to Richard Tobin, president.

His local service, called STARS (Spanish Television Audience Ratings service), will include reports on New York, Los Angeles, Miami, San Antonio, San Francisco, Chicago, Houston, El Paso, Albuquerque, Fresno, San Diego, Dallas, Phoenix, Tucson and McAllen-Brownsville.

Tobin has also set up an advisory board, in this case for STARS. Consisting of 18 members currently, including a number of senior vice presidents at ad agency media departments, says Tobin, it has met twice so far—on March 10 in Miami and June 9 in New York.

The SRC president also reports that two computer services have been added this year to those massaging STARS data. They are TV Scan and Arbitron's Maximizer. Added last year were Donovan Data Service and Media Management Plus.

SRC's RAMS (Radio Audience Measurement Spanish) service is dormant so far as syndication is

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Multifront battle in programming, coverage, news and advertising sales

Two networks slugging it out for viewers' eyes

Spanish-language television is believed by insiders to be a growth industry, still on its way to fulfilling its manifest destiny. Meanwhile, in the never-ending race between Univision and Telemundo to win the hearts and minds of more Hispanic television viewers and bigger budgets from more advertisers, Univision vice president, business affairs Andrew Goldman says, "Our game plan is to maximize our coverage of the U.S. Hispanic population. We currently reach 85% of the total."

Henry R. Silverman, president of Telemundo Group, reports currently reaching 4.2 million Hispanic households, or 71% coverage of Hispanic U.S.A. Then, in August when Telemundo's newest owned and operated TV station hits the air in San Antonio coverage will bounce up to 75%.

That still leaves a 10% gap that Gary McBride, senior vice president, marketing and sales, says Telemundo "is running faster to close up."

Multifront war

The push for coverage is just one battle of a multifront war. One theater is entertainment programming. Another is news. Still another is the race for revenue to pay off debt and move over to the black-ink side of the ledger.

Last year both Univision and Telemundo did well in the revenue department, but this year say they're doing better.

Bill Grimes, president of Univision Holdings Inc. reports, "Our network is very strong this year, about 25% ahead of '88." He adds that Univision's stations aren't doing "quite that well. They're only

about 6 to 7% ahead. That's better than the 4 or 5% we hear the general market stations are doing, but it's not as well as we should be doing."

These results follow a 1988 that showed Univision's combined network and station revenues 17 to 18% ahead of 1987. Grimes attributes this year's stronger showing to "both our improved programming and growing advertiser acceptance."

Telemundo president Henry Silverman is projecting revenues of \$85 million this year, up from \$55 million in 1988 and \$38 million in 1987. That, adds Silverman, is revenue for the Continental U.S. alone. Telemundo's owned WKAQ-TV in Puerto Rico brought

in another \$55 million last year and is expected to bring in comparable earnings this time around.

Jesus Chavarria's *Hispanic Business* magazine estimates Spanish language television in the U.S. earned some \$251 million of 1988's total Hispanic marketing ad expenditures of \$550.08 million. *Hispanic Business* breaks television's total down into \$123.5 million for national advertising and \$127.5 million local.

Back on the affiliate acquisition and building front, Univision's Goldman reports adding a full-power Reno affiliate in 1986 and six more full power television affiliates during 1987 and '88. These included full power outlets in Dallas-Fort Worth, Albuquerque, the Harlingen-Brownsville-McAllen market in Texas' lower Rio Grande Valley and a station in Tijuana that covers San Diego and Yuma-El Centro, Calif. These additions brought Univision up to 19 full-power TV stations by the end of last year.

Meanwhile, McBride explains that when Telemundo goes after new affiliates, "We do it a bit more aggressively. Univision is in a maintenance mode, but we have to play catch-up." As an example, McBride notes, "KMEX-TV has been on the air in Los Angeles, first

Bill Grimes, Univision Holdings



concerned, though there have been special studies recently for stations in New York, Chicago and Hartford.

Tobin, who has been conducting door-to-door research under the STARs banner for 13 years, says there are serious questions about the practicality of people meter measurement in Hispanic homes. "Only a small number of Hispanics are completely assimilated," he notes, arguing that they are the only Hispanics who will take readily to people meter measurement. "About half are partly assimilated, and maybe 40% are unassimilated." Cooperation among these groups will be low, he says.

Hispanic standard?

It remains to be seen whether Nielsen's people meter system can become the standard for describing Hispanic TV audiences. But it will do nothing to resolve the dispute about measuring radio audiences, though Birch has the edge because of its endorsement by the SRAC.

A reminder of the differences between Birch and Arbitron came from Katz Hispanic Radio late last month. In a comparison of winter '89 data in 13 markets, Katz researchers found Arbitron recording higher listening estimates for Spanish stations in 12 of the markets. The degree to which Arbitron topped Birch ranged from 6% in San Francisco to 111% in New York. Only in San Diego was Birch higher, and that ratio was 60%.

A previous Katz study comparing Birch and Arbitron in five markets and covering fall '88 reports showed (1) Birch was 19% higher overall Hispanic listening for total persons 12-plus, (2) Arbitron with 41% higher listening levels to Spanish stations, (3) Arbitron higher than Birch in each age cell for listening to Spanish stations and (4) Birch with higher listening levels for Anglo-formatted stations.

Says Janet Therrien, associate research director of Katz Hispanic Radio, "The industry needs to find the answers as to why these differences are occurring." Katz will make another try with the spring '89 surveys. "Hopefully then," she says, "we will be able to have some answers." □

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Henry R. Silverman, Telemundo Group

for SIN and now for Univision, for 20 years. So it took KVEA-TV three years of gradual buildup before we could capture a decent share of the Los Angeles Hispanic audience."

In other cases, he says, catching up is the result of "a 12-month or 18-month plan. And in a few cases like Albuquerque, we happened to be in a position where we could make a lot of impact quickly."

In Albuquerque, says McBride, "We opened our new affiliate there with the help of championship boxing: Primo Ramos versus Calvin "Southern Rebel" Klein, plus some local boxers on the card, all well-known locally. Now this isn't going to make the front page of *The Daily News* or *Post* in New York. But it is front page news in Albuquerque. And the mayor came for the ribbon cutting for our new station's grand opening. There were also Anheuser-Busch-Telemundo posters on every street corner in Albuquerque's Hispanic neighborhoods. We plan to take our fights to El Paso and to Fresno, too."

McBride sums up: "In most cases where we've succeeded quickly in a market, it's usually been a matter of investment spending on our part to establish a partnership with our new affiliate to promote our mutual new product in the market: Tele-

mundo's programming, made in the U.S.A., just as a Procter & Gamble or an Anheuser-Busch invests to promote their new products."

The way Univision's Goldman sees it, "There's no secret to achieving success in the Hispanic market. What it takes is involvement in the community. The sta-

tion that's most involved is the one that's going to be the front runner. And outside of New York, where Carlos Barba was there first with WNJU-TV and where who's on first in the ratings varies from book to book, we have a 15- to 20-year headstart in every other market we're both in, working with every key community organization, often helping them to raise money for community projects."

Eye of the storm

Goldman adds, "When problems surface, our affiliate is right there on top of things. For instance in one market a policeman shot an Hispanic under questionable circumstances. Things could have turned ugly on a much larger scale. But our affiliate had a news crew on the spot immediately, explaining to viewers exactly what happened and why it happened that way. Our local news team did three special reports on it on three consecutive evenings. Our affiliate was there to act as communication bridge between the city authorities and our own community leaders, and calm prevailed instead of what could have degenerated pretty quickly into serious and widespread violence."

On the lighter side, Goldman de-

Pedro Decima boxes on Telemundo



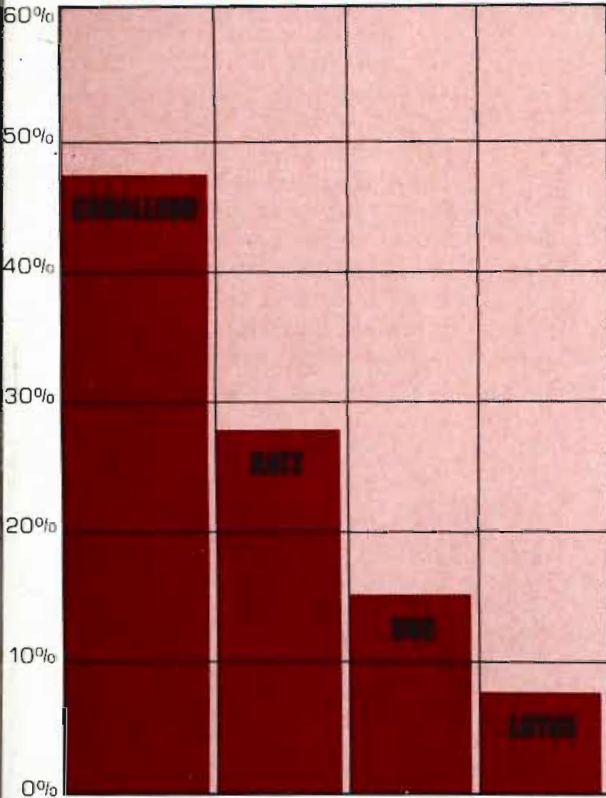
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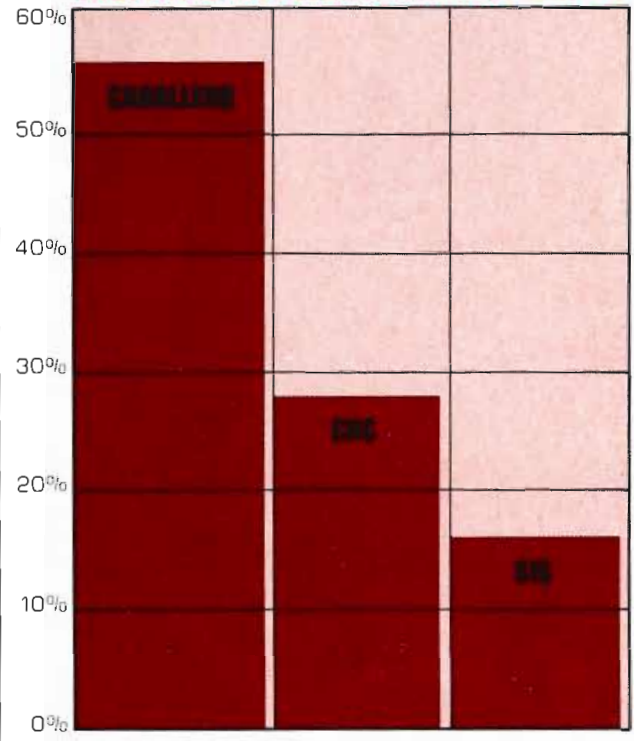
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*Birch top 16 Hispanic Target Markets Report: Average share estimates. Monday - Sunday / 6:00 a.m. - Midnight. September 1988 - February 1989.

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Univision's "TV Mujer" with Lucy Pereda, Gabriel Traversari

scribes how Univision affiliates "grow with the market. Albuquerque and Houston started as low-powers, then applied for full power as their Hispanic populations grew. Three years ago KLUZ-TV started up Carnivale in Albuquerque. It's patterned after Miami's annual Calle Ocho street festival and New Orleans' Mardi Gras. Now it's the biggest annual event in Albuquerque."

Goldman notes that during 1988 on up to April 1989, Univision added 55 more cable systems, "to bring us from 434 to 489 cable affiliates. We expect this growth to continue as cable continues its own ongoing process of constant rebuilding and adding additional channel capacity."

He says Univision provides the satellite feed of its programming to its cable affiliates at no charge: "They pay for installation of their own receiving dish. But they've already made that investment because Turner and HBO are on Galaxy I, the same bird we're on."

He notes that when Univision "trades up" from cable to low pow-

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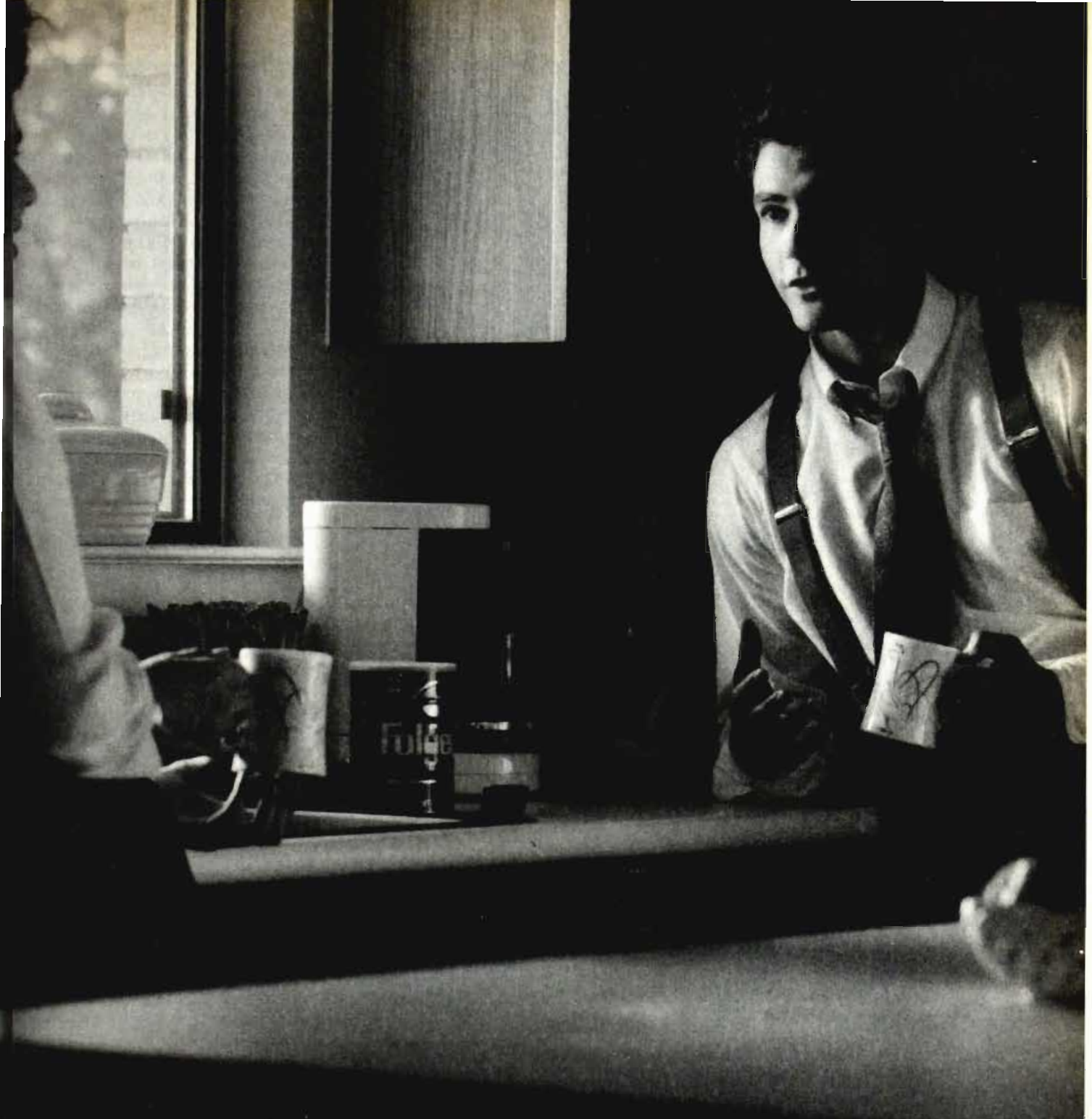
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er, then later from low to full power, "The new low-power benefits from the fact that our local Hispanic viewers are already familiar with us from what they've seen on cable. The cable systems like us because, with our network programming plus the local shows and news, we can help them target nonsubscribers in their own Hispanic neighborhoods. That puts our cable affiliates, like our full- and low-power stations, in a position to take an active role in the Hispanic community."

The newest affiliate added to Univision's lineup is low-power KVER-TV serving California's Inyo-Coachella Valley area. Univision's other low-power stations are in Denver; Austin, Texas; Washington, D.C.; Tucson, Ariz.; Hartford, Conn.; Philadelphia; St. Louis; Las Vegas; Detroit; Tampa; Lubbock, Texas; and, in California, Bakersfield and Santa Barbara-Santa Maria-San Luis Obispo.

Meanwhile, Telemundo's McBride also calls in from California where he's been visiting cable

systems "and meeting with two different parties ready to build new over-the-air affiliates for us."

Says McBride: "We'll go with the one who will go farthest in working with us as a partner to promote our programming and build up their station's ratings quickly. In many cases the people we talk to are broadcasters who are already operating radio stations. We can see how well they promote their radio stations and how close their station and its staff are to their own local Hispanic community."

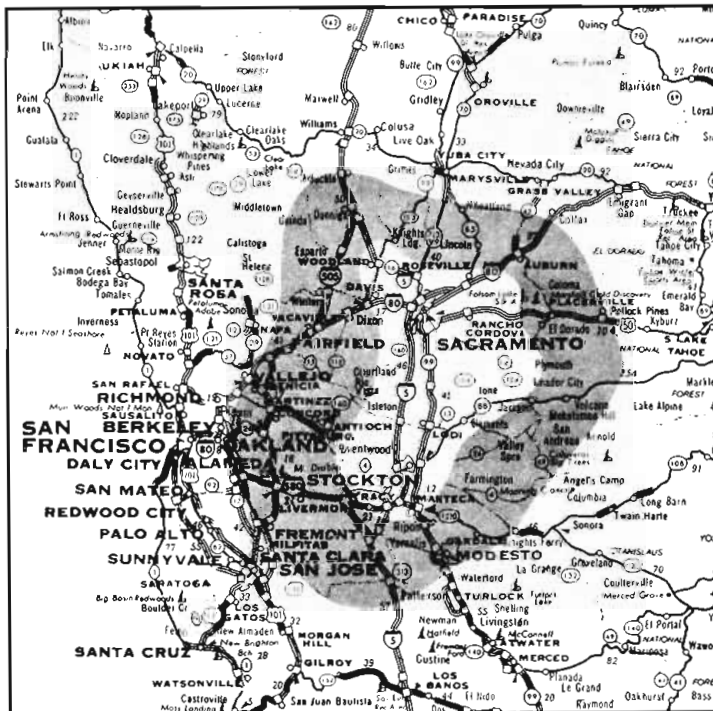
"But in every case we look for a partnership situation in which both they and we put everything we've got into promoting both our new affiliate and our Telemundo programming. We provide the creative assistance to boost our ratings and theirs. We create the basis of their TV commercials and their print ads. We send our programming PR they can send out under their own call letters to prospective advertisers like the local food store chains. We do a lot of billboard advertising. In El Paso the sides of the buses are covered with our advertising. And because we're producing more shows in the U.S., we can take them on the road and take our star talent on tour. We shot our current affairs show, *Dia a Dia*, live in Chicago, concentrating on subjects of interest to Chicago's Hispanics. We interviewed the mayor and Chicago's Hispanic community leaders."

Picking off the competition

McBride adds that San Diego's biggest cable system, Cox, with over 300,000 subscribers, some 80,000 of them Hispanic, "was persuaded to drop Univision and pick up Telemundo. They were interested in our made-in-the-U.S.A. programs to help them boost their number of Hispanic subscribers. They were interested in our marketing program that helps them do that at the same time it gives us more viewers. Our marketing program includes TV advertising and radio advertising; we're one of the largest cash purchasers of radio time in heavily Hispanic markets. And it includes printing and distributing our program guides in Spanish and it includes high-vi-

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Soccer on Univision

bility participation in local community events."

McGrade says network compensation is "negotiated on a case-by-case basis. In some markets we pay. In other markets we don't. Where we do pay, in some cases it's a fee. In others it's a percentage of ad revenue."

At Univision, Goldman recalls, "After looking carefully at the affiliate arrangements in effect at ABC, CBS and NBC, we created agreements we believe make more economic sense to both parties—both to the Univision Network and to our affiliates."

Goldman describes them as revenue sharing agreements. "We share a portion of our network revenue with the affiliates, and they share a portion of their local revenue with us. This avoids the situation general market broadcasters often get into, which can end up with the network and various affiliates fighting over the same piece of business. All that does is drive down the price for both parties."

And for Univision's new affiliates, Goldman adds that partici-

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Source: Share of Spanish TV Viewing S.R.C. Network Program Survey Nov '88 Feb '89

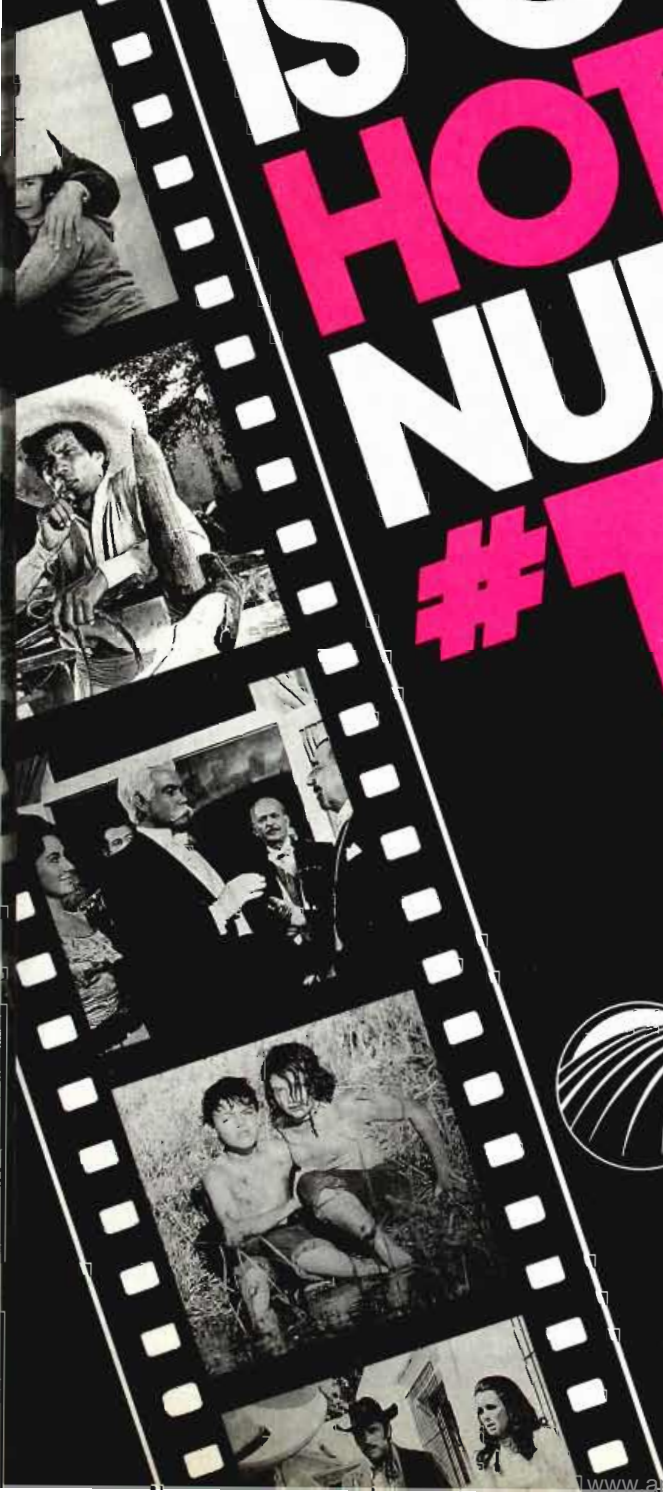
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tion in sharing Univision's network revenue "means that from the start, they're able to build a solid economic base. They're immediately earning dollars to invest in their own locally produced news and programming."

Meanwhile, Isaac Lasky, vice president of Hispanic marketing for W. B. Doner & Co., notes, "The trend continues toward production of more TV programming here in the U.S., with both Telemundo and Univision pursuing this course vigorously. They're doing so with the financial support of major advertisers."

"Programs like Univision's *TV Mujer*, *The Judge* and *Cristina*, and Telemundo's *Cara a Cara*, *Dia a Dia* and *Angelica, Mi Vida*, show that both networks understand clearly that their Hispanic viewers have plenty of alternative channels to switch to, so they had better keep pressing to come up with programs sensitive to Hispanic lifestyles and attitudes here in the U.S. So they do—in the face of the fact that production here can be a very expensive proposition. Univi-



Telemundo's Carlos Barba, I., Jose Francisco Lamas WSNS(TV) Chicago.

sion, for instance, is building major new production facilities in Miami."

Lasky adds that with all the interest in U.S.-produced programs for Spanish language television, "I wouldn't be surprised to see independent U.S. producers come up with pilots to sell to the networks, or development of a market for syndicated Spanish language shows produced north of the border. In fact there are a number of border stations, that are not affili-

ated with either Univision or Telemundo, that already carry some programs in Spanish and others in English."

Besides the programs named by Lasky, both Univision and Telemundo point to made-in-the-U.S.A. Spanish language versions of game shows, both feature novelas that follow the lives of Hispanics living in the U.S. in 1989, and both have talk shows before participating studio audiences. And for men, both networks have added



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Gary McBride, Telemundo

boxing to their traditional soccer, auto racing and baseball schedules.

In April 1988, Telemundo introduced its live, magazine format information and entertainment show, *Dia a Dia* (Day to Day), hosted by Maria Olga Fernandez and Felix Guillermo—usually from Miami, but sometimes from such locations as Los Angeles, Chicago and Mexico City.

By September that same year, Univision was on the air with *TV Mujer*, its own U.S. produced weekday magazine talk show featuring segments on such topics as health, cooking and child care, home and car maintenance, fashion, beauty, entertainment and travel.

Then in November, Telemundo went national with *Cara a Cara* (Face to Face), originated by KVEA-TV Los Angeles in late 1987. *Cara a Cara* is hosted by Maria Laria, tackling controversial subject matter with the help of a panel of experts before a participating studio audience.

Then this April Univision countered with *Cristina*, named for its hostess, Cristina Saralegui. Cristina also wades into such issues as virginity, the male animal—from the violent macho types all the way to the gay end of the scale, child support and how to pay for college. Saralegui, former editor-in-chief of *Cosmo-en-Español*, the Spanish-language edition of *Cosmopolitan*, also encourages audience interaction.

In the novela department, Telemundo premiered *Angélica, Mi Vida* last September as the first U.S. produced soap focusing on Hispanic Americans. Carlos Barba, Telemundo's senior vice president, programming & promotion, describes the series as a portrayal of "the trials, tribulations and loves of three Hispanic-American families whose origins can be traced to Mexico, Puerto Rico and Cuba. Our shooting locations have included San Antonio, Miami and New York City."

Univision's first novela with exteriors shot in the U.S., mostly in and around Miami, was *Amandote*, which bowed this January with its final episode scheduled for August. Exteriors for *Rebelde*, slated for a fall debut, were shot in Los Angeles.

In the youth department, Telemundo has joined MTV to present the first music video show produced in the U.S. for Spanish speaking viewers. *MTV Internacional* features such Spanish and English speaking recording artists as Miguel Bose, The Latin Rascals, George Michael and Sting.

And last month Univision unveiled its new children's program block out of DIC Enterprises. Rosita Peru, Univision vice president, director of programming, says the two-hour block, *Univision y Los Niños*, will feature four half-hour animated episodes produced in the U.S. and dubbed into Spanish for airing Monday through Saturday.

Rosita Peru, Univision



And in the real world of governments, guns and national and natural disasters, Univision vice president, news director Guillermo Martinez challenges CNN-produced *Noticiero Telemundo-CNN* to match the number of correspondents Univision fields in Latin and Central America.

Martinez calls 1989 "the year Univision News has hit the road in a systematic way, to originate from where the news is happening." He reports 12 staff correspondents plus six stringers—"18 people covering the U.S. and Latin America. During inauguration week we had one of our anchors broadcasting from Washington. Then we originated from New York the week following the inauguration. Since then we've already done or will do our early evening news from Miami, San Antonio, Dallas, Los Angeles and Albuquerque."

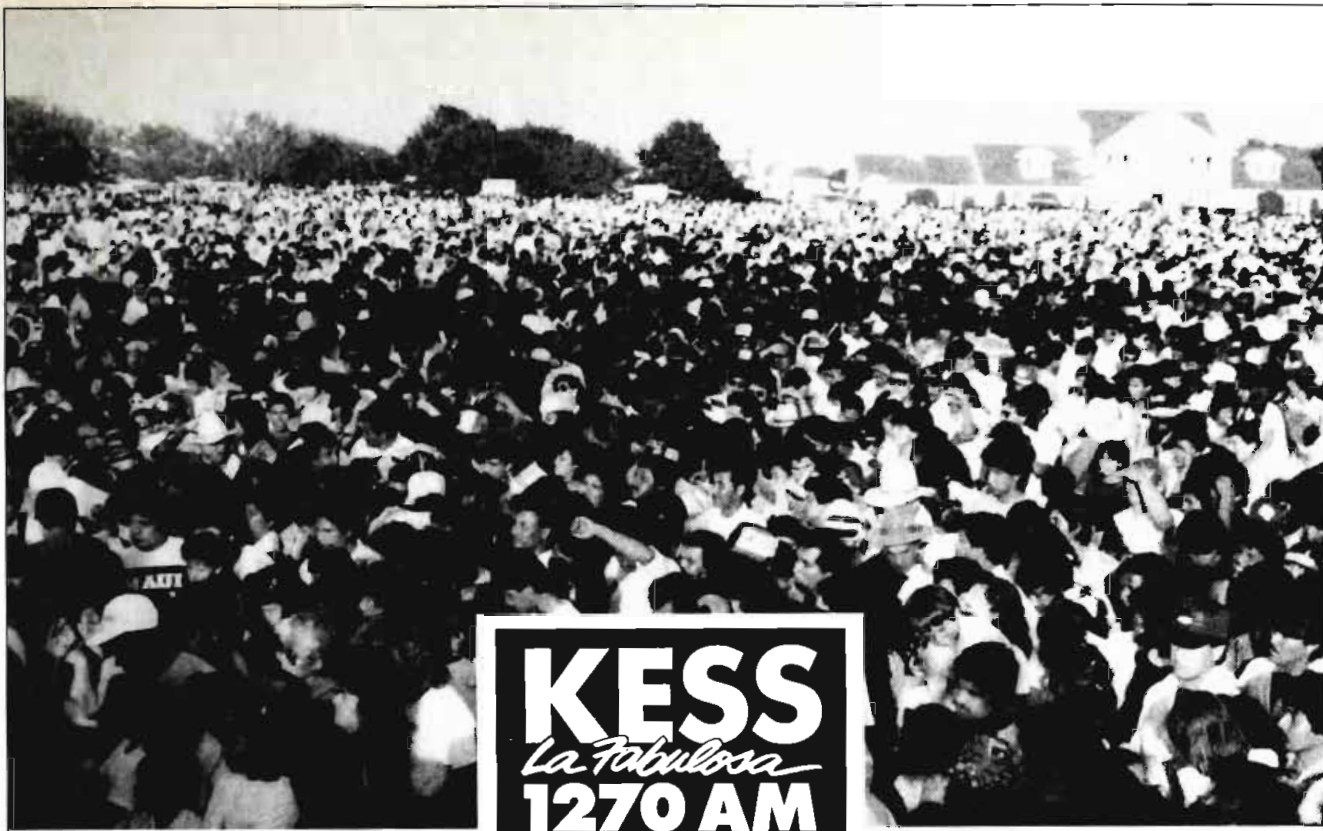
News by satellite

He adds that this spring, with national elections in El Salvador, Panama and Argentina, "Univision anchors were there, broadcasting from each of these countries via satellite."

Martinez describes *Portada*, Univision's weekly news magazine hosted by Teresa Rodriguez, as "a cross between *60 Minutes* and *20/20*. *Portada* includes some investigative pieces, some profiles, pieces on health and a consumer-oriented segment. For instance, we're doing a piece on how to hire an immigration lawyer. How do we make sure he knows his business? How do we make sure we get our money's worth?"

Maria Elvira Salazar, who coanchors *Noticiero Telemundo-CNN* with Jorge Gestoso, says the nightly Telemundo newscast "is produced by Hispanics for Hispanics, with the editorial emphasis on stories that affect the lives of our Spanish-speaking populace. This is not a translation of CNN. It is a completely unique news product created to meet the informational needs of the fastest growing segment of the U.S. population."

During its first week on the air last summer, Salazar reported live from Moscow to cover the Reagan-Gorbachev summit. □



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Ole! Latino TV outlets bullish

Fighting myths, Hispanics enjoy solid local, spot sales gains

Spanish TV stations for the most part seem to be enjoying bullish sales in local and national spot, with local typically the stronger of the two segments.

The outlets cite a variety of categories as contributors to growth, from lawyers and direct response in local to food, oil and home electronics on the national spot side. For many, the automotive category has accelerated spending in local and/or national during the first half.

Miami in doldrums

Although a few stations reported local or overall sales flat for the first half of the year, compared with a year earlier, most stations surveyed saw much stronger growth. KMEX-TV Los Angeles, for instance, tallied a 20% uptick in local as KVEA-TV Los Angeles and WSCV-TV Miami-Ft. Lauderdale enjoyed local gains of 35% and 50% respectively during the same time frame. In national spot, Los Angeles' KMEX and KVEA as well as Miami's WLTV and WSCV showed upsurges in the 30-40% range. To maintain those healthy growth rates, nearly every station is developing new sales approaches, often involving promotional tie-in angles.

Local sales have been flat for the first six months at WLTV Miami-Ft. Lauderdale, according to Jose Cancela, general manager. He

Jose Cancela



notes that the Eastern Airlines strike has been a factor.

Where car dealers have been responsible for significant local sales increases in other markets, this category was already a "mature" market for WLTV, representing 25-30% of the station's sales and including Toyota and other foreign makes. But this category was off from the first six months of last year, Cancela reports.

The good news for the station, though, is national spot, up about 40% for the first six months, he notes. Home electronics has been the hot category, and spot business from retail chain Circuit City has even helped local business by forcing competitor advertising.

The current advertising mix, according to Cancela, is 65% local, 35% spot. A year ago, national advertising represented only 20%, but the general manager notes this was an unusual situation, with the since-repealed Florida tax on advertising then in effect and driving national advertisers from the market.

Vendor program

Expected to help the station in the future is a vendor program being developed with Noll & Co., New York. "We're exclusive with them for South Florida," Cancela points out. Working with local business owners, WLTV and Noll expect to get vendor support for promotions. The major development so far is with Brandsmart, a local home electronics retailer, which is getting support from about 30 vendors. Cancela expects to have a 13-week campaign on the air in the fourth quarter.

What's especially significant to Cancela is that "In the past, none of the big guns in home electronics had spent any money in Hispanic media at all."

In the same market, WSCV-TV has been playing catch-up and experiencing a healthy growth rate, according to Damaso Santana, general sales manager. While WLTV

had the market to itself for some time, WSCV became a real factor when it became part of Telemundo in 1987. In 1988, the station completely restaffed in sales management positions—with more experienced people.

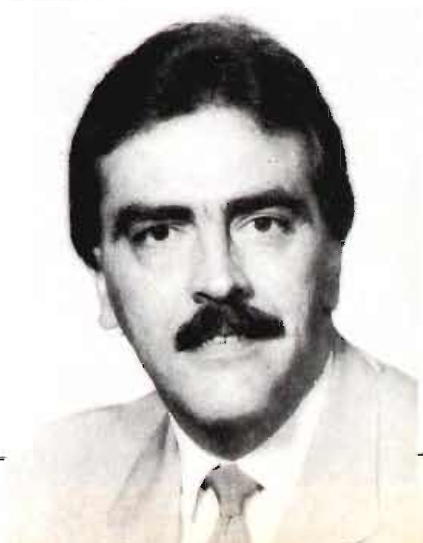
The net result, Santana says, is that local is up more than 50% for the first half, with some of the months up as much as 100%. Not only does the station trade on a better programming image through Telemundo but it also plays from strength in local news, he points out.

In local, Santana notes, the station has been selling more against retailer results than in terms of ratings. On a local basis, the station has brought in cereal, soap and detergent accounts as well as Florida-based Zephyr Hills mineral water. Like WLTV, the station has had recent success in the home electronics retail area.

New ground in Houston

National spot is up 35-40% for the first half, Santana reports, and much of the growth has been through advertisers that were already on the competing Univision station, although there are some exclusives on WSCV. Santana says Miami has traditionally been a strong local market, with the local-to-spot ratio averaging two-to-one and sometimes even three-to-one.

Damaso Santana





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Paul Niedermeyer

Houston, meanwhile, is a relatively new Hispanic TV market, even though it is the seventh largest Hispanic market and the 10th largest general market, observes Mauricio Mendez, vice president, general manager at KTMD-TV. The Telemundo station has only been on the air since February of last year, and its Univision competitor had been low-power until September 1987.

"So '88 was really the first year for Hispanic television in Houston," Mendez points out. While the potential station owners were waiting for the Federal Communications Commission to authorize the channels to make it possible, radio stations were experiencing phenomenal growth in the market, Mendez notes, with seven or eight of them "doing very well."

For February through June, KTMD is about 240% ahead of its initial five months last year, Mendez reports. Right now, about 70% of sales are local, but he expects the ratio to be more like 60/40 as the station becomes more established in ratings.

"We're doing well with new car dealers," he reports. "Not only Ford and Chevrolet, but also Toyota, Honda and Mitsubishi. The oil companies are another strong area. We've brought Chevron into Hispanic TV for the first time in any significant way. We've also got Texaco, and we're working on Exxon to include Hispanic TV for 1990."

Although the station isn't competing directly with radio stations, Mendez says, it's using what it considers a radio technique—doing remotes from clients' places of busi-

ness: "This has been one of the clinchers in bringing in car dealers."

Mendez claims Houston is the fastest growing Hispanic market in the country, with 120,000 former illegals registering with the Immigration and Naturalization Service during the May 1988 amnesty—the second highest number of registrants after Los Angeles. Although Strategy Research Corp. shows 805,000 Hispanics in the market, Mendez claims unregistered aliens would make it the fourth largest Hispanic market after Los Angeles, New York and Miami. He notes Chicago, San Francisco and San Antonio are shown to be each only about 100,000 ahead of Houston.

He notes that, with the families of the 120,000 newly registered persons expected to arrive, the figure should multiply by three to 360,000. He adds that San Antonio has had very limited growth in the past five years.

San Antonio smashes myths

Jon Yasuda, general sales manager, KWEX-TV San Antonio, says, "We're up a little bit" in local sales but "up quite a bit" in national spot for the 1989 opening half. The local/national spot business split is roughly 50/50.

New local business has been generated by Adolph Coors Co., Highland Superstores and Drypers, he says. Within local, Yasuda notes, "The automotive business has picked up tremendously. The old adage that San Antonio Hispanics can't afford to buy cars has been wiped out." In addition, he says, lawyers has become the No. 2 local category, second only to auto dealerships.

On the national side of the ledger, he continues, new accounts lately have been American Express, Gerber Products, Hershey Foods, Levitz Furniture and Nissan.

Among the new approaches being taken by the station, he says, is "doing a lot with promotions." KWEX-TV will be staging local auditions for *Sabado Gigante* and also bringing in on-air people from that top-rated Hispanic game show, he says.

In mid-July, KWEX-TV began a new image campaign, themed "Miranos hoy" (Watch us now). The rationale behind that theme is that focus group research indicated that viewers of the Univision-owned outlet were not so aware of the network's new program developments, he explains. Despite the fact that novelas now account for "under 30%" of KWEX's schedule, he says, "The perception is that they're still there" in higher numbers than that. "Myths sometimes perpetuate longer than reality," he observes.

That is often the case when it comes to advertisers' perceptions of the Hispanic marketplace in San Antonio as well, he says. In KWEX's latest sales presentations to prospects, Yasuda says, "We're breaking apart the myth that San Antonio Hispanics are completely assimilated. The same with the perception that San Antonio Hispanics are poor. True, the average income here is lower than among Hispanics in markets like L.A., Miami and New York," he continues. "But it doesn't take as much to live in San Antonio. About 70% of Hispanics own their own home here."

Since KFWD-TV Dallas-Ft. Worth went on the air on Sept. 1, Arthur Gray, station manager, says he has no track record against which to measure its performance. So far, the station's business subdivides into 65% local and the rest national, although he adds, "Eventually, we expect that to be equal, or for national to overtake local."

In local, KFWD's main task, he says, is to get clients to make the transition from Hispanic radio to

David Murphy



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Hispanic TV. Many accounts already are buying time on no other TV outlet, he boasts, and many in the automotive, package goods and lawyer sectors are buying major program sponsorships.

"On the national front, there's an almost overwhelming need for promotions and value-added structures" not available in the general market, he adds.

General market pitch in L.A.

KMEX-TV Los Angeles is running about 20% ahead on local and 30-35% in national spot, according to Craig Kinney, general sales manager. New spot advertisers include Tropicana orange juice and Pep Boys auto parts.

Kinney says more general market advertisers are coming through because "the client is starting to request us after we go to the client with our story. West coast people are telling their parent companies to put their money in Hispanic TV on the west coast."

Meanwhile, he comments, national sales made by Univision have improved since the company split up network and spot sales, allowing specified salespeople to pay full attention to spot. National advertising was only 15% of the station's pie last year, Kinney says, but it is now about 20%.

In local, Southern California Toyota Dealers is now one of the biggest accounts. Newcomers sold locally are Carnation's Coffee Mate, Bank of America, Canon cameras, Tecate beer and Ross discount department stores. Kinney says '89 has been more promotion-oriented, including special events

Craig Kinney



and in-store sampling.

Giving KMEX tougher competition for audience share is KVEA Los Angeles, where Stephen J. Levin, vice president, general manager reports local up about 35% for the first half. He attributes a good part of the growth to improved ratings.

With or without ratings, there is a proliferating number of local advertisers going into Hispanic TV, Levin reports. Two major growth categories, he says, are attorneys and medical clinics. Key to the former is a legal reference service that viewers can call to get referred to Spanish-speaking attorneys experienced in specific legal matters.

National spot is up about 35% for the station, says Levin: "That has come about because corporate America is acknowledging the need to advertise to the Los Angeles Hispanic market in Spanish. This is mostly brand advertising vs. institutional, and automotives are the biggest category coming in.

"We used to talk about BBC—before beer commercials—but now it's the year of the car." Nissan, Hyundai and Toyota have come aboard, "and we had Pontiac early in the year, and we know our competition had Chevrolet recently.

"We have very high levels of inventory sellout, although almost all of our local business is direct response. It's mostly lead advertising, so advertisers can monitor how well the station is doing by how well the leads come in. This, coupled with ratings growth, has pushed us toward sellout and rates that are up almost 100% over last year."

San Francisco gains

In San Francisco, KSTS, which went on the air Nov. 1, 1987, is running nearly double the first half local sales figures of last year. As for national spot, Paul Niedermeyer, general manager, will say only that it's ahead of budget.

Auto dealers and associations have been a strong part of the local growth, as have supermarket chains, health care organizations, dentists, chiropractors and lawyers. The entertainment category has also done well—local dances and concerts and Spanish-language movies. Local represents about 65% of revenues, according

Call-in services have been spending heavily on TV in Puerto Rico, but maybe not for long—because of reservations about their legality.

to Niedermeyer.

Promotion has been a strong part of the station's sales orientation. KSTS has signed with rights holders for local events for on-site exposure as well as media rights: "It's primarily a means to sell our time because most of the other revenues go back to the organizer of the event. This is appropriate because most of the events are put on by nonprofit organizations."

In comparing the '89 first half to year-ago levels, Michael McCarthy, general sales manager, KDTV San Francisco, says, "We're up about 20% on average, with national spot up more than local." The local/national breakout used to be 70/30, he adds, but "this year it's probably going to be 60/40 or possibly 55/45."

He explains the change by pointing out that the station has become a Univision-owned station over the past 14 months, during which time "we had a lot of business locally transferred to our rep." Consequently, the bulk of the change in local/national comparisons, he notes, has "mostly to do with accounting transfers."

At KTVW-TV Phoenix, Michael Flynn, general sales manager, notes that local and national spot sales volume for the '89 first half stayed "about the same" as the corresponding 1988 half. Local accounted for twice the volume of national spot, he adds.

Turning to new accounts, Flynn cites U-Haul International as "new for us, probably the most significant new client." U-Haul is Phoenix-based.

As the newest Univision-owned outlet, effective June 1, KTVW ex-

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business hours, making radio the medium of choice for 1990 World Cup Soccer fans.

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BE A PART OF IT



Carlos Barba

pects to benefit mightily from access to the network's research and sales materials, Flynn says.

"Sponsorships of local events in the community are very large with us, as with most Univision stations," Flynn points out. Advertisers participating in such events do a good deal of couponing and product sampling, he adds. As for major on-air sponsorships of specials, there is not much of that, says Flynn, but "we will try to do more of that" now that KTVW has the clout of being a Univision O&O.

Tough times in New York

Mara Rankin, vice president, general manager at WXTV New York, reports local sales are flat, "with automobile dealers not advertising as much as they should and retail soft this year." Having recently been shifted from Univision's WLTV Miami, which has had strong results in churning retail dollars, Rankin says she will give top priority to New York's retail opportunities.

National spot at the station is up about 15%, with cosmetics, health-and-beauty aids and Fruit of the Loom underwear coming in as new categories. Package goods, the station's top national category, has improved, with some new advertisers within the category. She also notes a big investment from Chevrolet—in corporate advertising and for specific cars and trucks.

New York's Telemundo station, WNJU-TV, reports combined local and national sales up 20%. Among new advertisers, according to Carlos Barba, president, general manager, are Potamkin Cadillac, some tristate dealership associations, major banks and savings-and-loans including Dollar Drydock, the law firm of Rosenbaum & Silverstein,

motion picture companies including Warner Bros., HBO, Fruit of the Loom, Woolworth and the Seaman's and Levitz furniture chains.

Traditional promotions that work well in other markets don't do so well in New York, according to Barba, because much of the city's Hispanic population is without a car to drive to an in-store event and also unlikely to get on a subway to go to a different borough.

Nevertheless, the station is working with a dairy product, which it declines to specify, that has low Hispanic usage. This will involve in-store promotions offering recipes and other information on how to use the product.

Upbeat in Puerto Rico

"The market is up and in general the station is up" in sales for the opening half, says David Murphy, vice-chairman/CEO at WKAQ-TV San Juan. Looking ahead, he adds, "We see a good economy through the end of the year. Really, 99% of our business is local. A very small portion comes out of the U.S."

WKAQ has a local business development staff that seeks car dealers, small retailers and others that do not use TV much if at all, he says. "That billing is up about 13%."

The station also does "a lot of live programming and a lot of on-air merchandising and contests, often as copromotions with advertisers that also involve a local radio station and a newspaper—all wrapped around a TV show."

Incremental ad dollars also have been generated by sponsorships of the live hearings in Washington and San Juan about the future of Puerto Rico, Murphy continues, and by a 5 p.m. magazine show called *Live at Five* (including shows telecast from New York during the May ratings period). Another revenue source is Cosmovision, which produces commercials for local accounts. These range from low-budget to expensive shoots, he notes.

"We had an excellent first half of the year as compared to 1988," says Hector Martinez, vice president and general sales manager, WAPA-TV San Juan, who adds that its overall growth was in the 15%

range. "About 95% of our business is local," he notes.

Companies touting various telephone call-in services have been spending heavily since March in late fringe, he says. However, since the government has some reservations about the legality of their services, "They're probably going out of the market soon," he adds. The only other growing category that comes readily to mind, he says, is U.S. auto makers, which have improved their TV spending in this market at the same time as Japanese imports have cut back.

WAPA is working on promotional packages for advertisers hitherto heavily or solely spending in the print media, Martinez continues. Already there have been some successes, he says, pointing to Ponderosa Steak House, which this month began a TV campaign after having been a print-only advertiser.

Owned by Malrite Communications since 1986, independent WSTE-TV Ponce-San Juan is now a significant ratings factor in the market. Wayne Casa, vice president, general manager says its success since the acquisition has been through counterprogramming—running movies from 7–9 p.m. weekdays while the competition runs novellas, and airing novellas while the others run news at 5 p.m. and other programming at 9 p.m.

Casa reports local sales are up more than 50% for the first half. This includes national advertising, which is placed through local agencies and not broken out by the station. He says his station's results compare with a market that grew 9–10% in the first half.

"Although rates aren't going up," he notes, "budgets are expanding." This includes budgets that have been shifted from other media, he adds. □

Steve Levin



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Generating new dollars for broadcast media

By **JESSE G. WILSON**, executive vice president, and **ELAINE G. HARTONG**, account supervisor, San Jose & Associates, Chicago

The U.S. Spanish-language advertising industry, a little more than two decades old, continues to enjoy growth from advertiser investment spending while simultaneously the industry expands the quality and types of services being offered by professionals in this highly specialized market segment. The development of services offered is a result of both changes in the marketplace and experience gained by marketing practitioners.

A prime example is the development of the creative sales promotion programs now being incorporated into advertisers' marketing plans. These programs tap into the advertisers' general market sales promotion budgets and bring new dollars into the Hispanic marketing industry, a portion of which can be used in media.

In varying degrees, most trade and consumer sales promotion activities can be found in use in the Hispanic marketing industry, including: POP/display activity, and premiums/incentives, meetings and conventions, trade shows and exhibitions, and community event marketing.

Sales promotion varies

However, the state-of-the-art of sales promotion varies considerably between Hispanic and general market programs—especially since the Hispanic market segment is constantly fueled by a high rate of immigration (62% growth since 1980: Strategy Research Corporation) of consumers who are unfamiliar with many of the sales promotion tactics used in the U.S. For example, the average U.S. household received around 2,600 pieces of direct mail during 1987, while the Hispanic household averaged about 20 pieces. Several reasons contribute to this difference, such as insufficient Hispanic list availability, the fact that Hispanic con-

sumers are unfamiliar with the habits and practices of coupon usage and the perception/feeling they hold that coupon usage signifies a buyer who cannot afford to pay for a product.

On the other hand, community event marketing is probably more widely used in Hispanic marketing than in the general market. A community event centered around a major holiday, such as Fiestas Patrias, holds a cultural and social significance unique to the Hispanic market. By participating in these events, a brand not only enjoys direct impressions but engenders itself in the community in a way that other Hispanic marketing techniques cannot duplicate.

Overall, Hispanic market sales promotion expenditures are significantly less in magnitude than that found in the general market. According to the Television Bureau of Advertising, in 1987 about 65% of all marketing dollars, or \$115 billion, was invested in general market sales promotions. Unfortunately, corresponding sales promotion dollars are not reported for the Hispanic market.

Same marketing principles

However, *Hispanic Business* states that in 1988, approximately \$550 million was spent for measured Spanish-language advertising.

Following the general market formula, using a 65:35 ratio and assuming for the moment the Hispanic marketing industry to be equally developed to the general market, this would indicate that over \$1 billion would be invested annually in Hispanic sales promotion—an amount that is far from reality. Our best estimate is that not more than \$25–30 million, or around 5% of all Hispanic marketing dollars, were spent on Hispanic market sales promotion in 1988.

Given the fact that marketing principles are basically the same for both markets, the Hispanic market should enjoy a surge in sales promotion dollars to be invested. For example, marketers

and brand managers already familiar with the merits of sales promotion in the general market should naturally favor the same concepts when applied to the Hispanic market, especially if the advertisers' promotional approach is more regionalized, or focused on opportunity markets.

From a national perspective, Hispanic marketing is regionalized, with 57% of the documented U.S. Hispanic population residing in the top 10 Hispanic cities (Strategy Research Corp., 1989). This concentration enables localized sales promotion programs to be easily conducted with strong resulting sales impact.

'Media driven' promotion

One promotional approach currently being refined and providing outstanding sales results is what may be called a "media driven sales promotion," an approach utilizing media advertising in combination with retail display activity in stores of high Hispanic trade.

In this approach, both trade and consumer sales promotion elements are combined. In a basic display program, the timing of the promotion is centered around product deal periods and offered to targeted retailers who enjoy high Hispanic trade.

A strong broadcast media schedule of brand advertising begins prior to, and continues through, the display activity period in order to build high consumer awareness and pull the product through distribution. Retailer participation in the display program is negotiated prior to the event.

In markets where these display programs have been successfully executed and promoted, retailers want to be involved because of the increased shopper traffic generated and the advertising mentions offered to the retailer as an incentive.

Beginning with this basic retail display promotion structure, additional elements can be added, such as: demonstrations, couponing, sampling, contests/sweepstakes, and community event tie-ins. □

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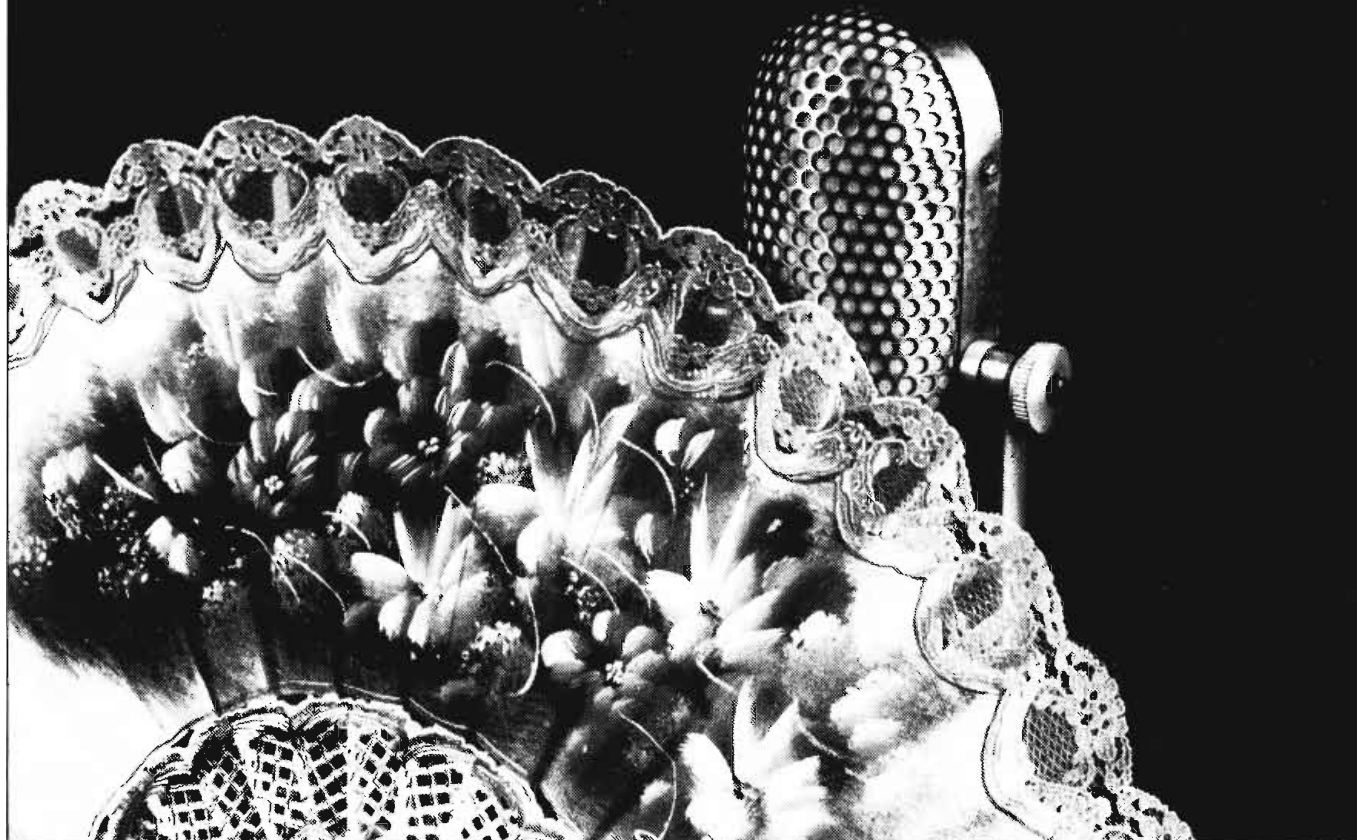
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| September 12-14 | National Hispanic Market Trade Show & Media Expo, Century Plaza, Los Angeles |
| September 13-16 | Radio-Television News Directors Association Convention, Kansas City Convention Center September 4 Issue |
| September 13-16 | NAB Radio '89 Convention, New Orleans September 4 Issue |
| September 22-27 | Cinetex '89, Bally's Casino Resort, Las Vegas |
| October 3-5 | Atlantic Cable Show, Atlantic City Convention Hall |
| October 12-16 | MIPCOM International Market, Cannes October International Issue |
| November 5-8 | Community Broadcasters Association Convention, Riviera Hotel, Las Vegas |
| November 13 | London International Advertising Awards, Royal Lancaster Hotel |
| November 13-15 | Television Bureau of Advertising Annual Meeting, Century Plaza, Los Angeles November 13 Issue |

1990

| | |
|-------------------|---|
| January 3-6, 1990 | Association of Independent Television Stations, Century Plaza, Los Angeles January 1 Issue |
| January 16-19 | NATPE International, New Orleans Convention Center January 15 Issue |
| January 18-21 | Radio Advertising Bureau, Annual Managing Sales Conference, Loews Anatole, Dallas January 15 Issue |
| February 11-16 | International Television Festival of Monte Carlo, Loews, Monte Carlo February Television/Radio Age International |
| March 31-April 3 | National Association of Broadcasters, Atlanta March 26 Issue |
| April 20-25 | MIP-TV, Cannes France April Television/Radio Age International |
| May 21-23 | National Cable Television Association Convention, Atlanta Convention Center |
| June 12-14 | ABC-TV Annual Affiliates Meeting, Century Plaza, Los Angeles June 4 Issue |

Programming

Bohbot's Hirsch hits kid syndication marketers, looks to spot purchases

While the kids' upfront marketplace in syndication was strong for a special few—the top rated shows and one or two new fall entries—and decidedly soft for most others, Bohbot Communications is staying on the sidelines in kids' buys in syndication, questioning some of the syndicators' marketing practices and looking to spot for much of its purchases.

Shelly Hirsch, an executive vice president at the major buying service, charges that several syndicators are playing their own types of games, and that for other reasons as well his objectives can best be served by going the spot route. Bohbot was a major player in the kids' syndication marketplace this past season, points out Hirsch, but not this year so far. One reason is that Hirsch believes that some syndicators are not giving an accurate appraisal of a show's actual performance.

Also, some syndicators want the advertiser to buy 13 weeks of a quarter as a condition of giving the advertiser a ratings guarantee, says Hirsch. "But if they don't sell all their inventory, they will give the same guarantee to a buyer who will buy five weeks in a quarter. So why should we put our advertisers' money upfront?"

Target audience. "Too, we find that a lot of syndicated kids' properties are targeted toward the top 50 markets. The purpose of syndication is to give a national picture. But what we are getting is much less. What happens is that you end up buying syndication but complement it by buying spot as well in 25 or 30 markets. When you do an analysis you find that the markets being delivered by syndication are the same 25 or 30. They are not giving you the back half of the country, which is something you are looking for."

Another Hirsch complaint is, "When you buy a syndicated property, you buy it because you want to be targeted toward a specific objec-

tive. But in some cases a show is cleared with the understanding that the station has no intention of running the show.

"Sometimes, many of these stations just intend to run the spins, so I'm relegated to exactly what I get in spot TV—running spins in a kids' rotation, not inside the show."

Also, he mentions the gap between the network Saturday fare, which is 95% coverage vs. the usual-

Thurston sees '227' sales growth with affiliates staying with sitcoms

The sales of 227 in off-network for the fall 1990 are moving well, according to Barry Thurston, Columbia Pictures Television's president, syndication, who expects that the pattern will become even more upbeat over the next few weeks. In updating the sales activity of the sitcom, Thurston says initial sales for the 116 off-network episodes have been strong and have set the tone as to where sales are headed.



Barry Thurston

First off, according to Thurston, some affiliates have been sold, as expected, in markets where *Who's the Boss?* has been acquired. Indicating to him that affiliates will stay in the sitcom game for years to come. One of the affiliates is in Chicago, WBBM-TV, the CBS-owned station, despite that four other sitcom half-hours were also made available: *Golden Girls*, *Amen*, *ALF*, and *Hogan's Family*. "The

ly less coverage on a syndicated product. "Too, in the network kids' block, you know you are running everywhere at the same time, with the difference being only in the time zones. In syndication, in one market, you're on in three in the afternoon and in the other, at seven in the morning."

"We're not saying we won't be in syndication, but we will play it like everyone else. We will pick what we want and when we want it."

Hirsch, despite the putdowns, adds that syndication "is not a bad medium. There are good syndicators who play it straight. Ultimately, the market will weave the good from the bad."

fact that they bought both *Boss* and 227 represents a major sale, considering the four indies and the three O&Os."

In Baltimore, 227 was sold to WJZ-TV, CBS affiliate owned by Westinghouse, which also has *The Cosby Show* and *Growing Pains*. When it comes to major indies, Disney's KHJ-TV Los Angeles, which also has *Boss*, *ALF*, *Perfect Strangers* and *The Hogan Family*, bought 227 as well.

New York unsold. At this point New York remains unsold, by Columbia's design, says Thurston. "We backed off New York basically about six weeks ago, when we saw there would be a change in the WPIX(TV) management. Now that the other shoe has dropped, we think that competitively the market will change and expect to do a deal there in the next month." A change in management in any market usually means a change in the direction of the station, believes Thurston, and it was basically for this reason that Columbia decided to put any sales effort in New York on hold until all the station's players were in place.

"You can do that or exclude the station and probably have to settle for a lower price than anticipated, says Thurston. WWOR-TV, for example, made changes in programming direction when it was taken over.

Viewpoints

Don Peppers



Executive vice president, director, business development, Lintas: USA, in a speech before the American Advertising Federation's National Advertising Conference in Washington. Before joining Lintas a few months ago, he was senior vice president, group director at Levine, Huntley, Schmidt and Beaver, running that agency's business development program.

Future TV advertising to be more targeted, transaction-oriented

Transactional communications are a very important function in tomorrow's communications technology. All conduit format communications vehicles can be interactive or transactional. What it really means is that the media advertising agency, the middle man concept, the advocate, is going to turn into a distributor. Well imagine this, you're watching a commercial, and by punching a button on your control panel, you get to order the product.

Here's some issues we might want to think about. When Anacin pays for having its commercial aired, do they pay for the original audience or the final audience? When Chevrolet evaluates its advertising buy in the 1992 Olympics, should they pay more attention to reaching frequency, or to coupon responses? Exposure, or behavior? Does it matter that fewer people ask to have Chevrolet off their TV screens than Anacin? Is that important to Chevrolet? It's probably important to Anacin. I submit, it's probably also important to Chevrolet.

Commercials by choice

I want to pose another question. Suppose you're allowed a choice between paying \$15, \$50 or \$75 a month. For \$50 a month the cable operator says he's not going to sell the information of your transactions to marketers. For \$75 a month, you don't see any advertising at all. Which would you choose? I don't know about you, but I'd probably choose the \$15 a month—I think. I know my kids would, because they like to watch the advertising.

Another question. Will a system that allows consumers to make this kind of choice simply evolve? Will this just happen in the 21st century, or must it be mandated by regulations in the 1990s? That's where we are, we have the technology; the question is, how will it be regulated. Will we create the disciplines and structure necessary to control this technology, or will

we have it created for us by consumerism? We have to allow consumers the choice. We have to allow them to be in control, or they will take control.

Now, I've seen a lot of people licking their lips and a lot of people sort of horrified by this technology. Imagine a scenario in the future when everything that you've done for the last 10 years on your television is sold to R. J. Reynolds and they begin marketing personalized products to you. How many black Model T's were manufactured? About 3 million? Three million black Model T's? You know what the average production run of the automobile is in this country today? Fifty. Fifty automobiles are produced, and then they change the specs and they produce another 50, or maybe they produce 10 and 100, 500 and two and three. Incredibly personalized products.

Consumers are going to be in control of their own destinies. The people who worked the land that the landlord's own, in the agricultural age, moved to the cities and worked the factories that the capitalist's own in the industrial revolution age. Well you know, this information is going to be relatively freely available. Entertainment and information is going to be freely, almost freely available to every consumer.

All you need is some very inexpensive technological gadgetry and you can roam the planet, in search of your own images, your own entertainment, your own information. We are going to be hunters and gatherers of information and images. We will be limited only by our own ability to process and use that information.

Need for greater targeting

Our advertising messages are going to be far more condensed than they are today. I think they're going to have to be far more targeted. If I'm a cosmetics company and I have a new facial cream, I'll arrange for my TV commercial to show only in households where the woman of the house subscribes to certain fashion magazines and owns certain brands of facial soaps because that's my market. Those are the only people I pay for. I can play with too many commercials, because that's pay dirt, and I couldn't afford a two-minute commercial to all the people I would have to expose if I played it on network around the country.

Well I think we, as marketers, today have a fairly reliable image of our customer, even though we don't have all the information of their particular responses. What I think is going to happen is, the perimeter of the software that determines whether or not you have a valid potential response, those perimeters are going to be set by the marketers. If this set of perimeters doesn't work this week, then I'll set another set of perimeters next week. Maybe I'll change the commercial, or change the commercial mix. I'll have an infinite amount of test calls, won't I?

Instead of test advertising where you run a test program in Moline and you run another test program in Bartelsville, Okla., now I can take a network commercial and divide it up into 100,000 cells of a thousand households each, test a 100,000 different approaches, and I'll take the first 10% of those. I'll retest and I'll refine it, and I'll eventually come out with one hell of a good ad.

No. 2 finisher" to CBS' *60 Minutes* last season and the show with "the highest concentration of kids in primetime." Even though *Disney* was hard hit by the strike, he states that it still enjoyed a bigger ratings lead over ABC than *Our House* had the previous season.

Besides *Brand New Life* with Barbara Eden and *Parent Trap* with Hayley Mills, *Disney* will consist of the studio's classic films and specials, such as *Mickey's Christmas Carol* in December and *Polly* in November; the latter is a remake of *Pollyanna* with *The Cosby Show*'s Keshia Knight Pulliam and Phylicia Rashad. *Disney*'s final spoke will spotlight "all-star producers" with new offerings. Already set are *21 Jump Street*'s Patrick Hasburgh, *My Two Dads*' Michael Jacobs, *Our House*'s William Blinn and Matt Williams of *Roseanne* and *Cosby* fame.

'Disney' distant second? Looking at the leadoff Sunday hour, Bozell anticipates that *Disney* and ABC's new *Life Goes On* drama "should only tie for a distant second" against CBS. Saatchi & Saatchi observes that *Disney* "didn't have the magic in year one, but perhaps in year two it can provide a lead-in for *Sister Kate*," especially since "ABC's all-new 7 to 9 p.m. block seems soft."

In recent weeks, there have been rumblings that still other projects were considered as spokes in ABC's *Mystery Movie*, with some citing *The Equalizer*, the Universal series cancelled by CBS, and others pointing to *Father Dowling Mysteries*, the Fred Silverman/Viacom series dropped by NBC. *Dowling* had averaged a 21 share, *Equalizer* a 17. Until she signed her CBS contract, Angela Lansbury and *Murder, She Wrote* were hotly pursued by ABC.

Dowling is being picked up by ABC but as a separate one-hour midseason series, according to various sources.

Regarding the **Equalizer** series, for *Equalizer*, its producer, James McAdams, and Universal continue to hope one of the networks will consider periodic two-hour *Equalizer* movies, as with NBC's highly successful *Perry Mason*. McAdams will be *Kojak*'s exec producer.

Eclipse debuts with three projects

Eclipse Entertainment, Chicago-based TV syndication company formed in January, has three projects it expects to launch over the next six months. The three programs are *Travel & Adventure*, a family oriented half-hour weekly "reality" show looking for a fall start; *What Is House?* a one-hour special from after-hours clubs, for an end-of-year debut; and *Metro TV*, quarterly one-hour lifestyle specials tied in with *Metro* magazine, Chicago publication, beginning with the first quarter of 1990.

According to Eric Parmacek, president of Eclipse, the company is looking to broaden its initial scope and is planning a game show, a weekly talk show for adults and possibly a movie or two down the line. If all goes well, the game show will be launched for the fall of 1990, with production coming from Eclipse's affiliate, Imagico Communications. Imagico is producer of the other Eclipse shows as well.



Eric Parmacek

Travel & Adventure is offered on a barter basis, with two-and-a-half minutes for national and four for local sale for the fourth quarter, says Parmacek, and a three/three-and-a-half minute split for the remaining three quarters. Thirty-nine half-hours are planned, and production has begun for a Sept. 23 launch. The series is hosted by James Makawa, former NBC news correspondent, and episodes include white water rafting, a trip to Zimbabwe's Victoria Falls and to Scandanavia, all designed to "give the viewer the actual experience of being right in the action," says Parmacek.

At this point, Parmacek says he expects to clear at least 50% of the U.S. soon for the travel show and has tentative license deals with stations in the top 30 markets. Advertiser interest is running high as well, according to Parmacek.

Eclipse recently hired three key syndication salesmen in conjunction with its projects' launchings. Richard Grove, formerly with LBS Communications, is vice president, national sales manager; Lou Gonzalez, becomes midwest sales manager, after a stint at BBC/Lionheart; and Lee Jackoway, eastern sales manager. He had been at Coral Pictures.

Syndication shorts

Orion Television has cleared 13 stations for its *Crimewatch Tonight*, for a total of 72, including all of the top 10 markets. The most recent licensees include WLWT-TV Cincinnati, KVRN-TV Fargo, KCIK-TV El Paso, KIVI-TV Boise, WTVT-TV Tampa, KXRM-TV Colorado Springs, and KSTP-TV Minneapolis.

DLT Entertainment's *The Mystery Wheel of Adventure*, 10 two-hour mystery programs premiering this fall, has been presold in all 30 of the top 30 markets. Markets cleared, which represent more than 70% of the U.S., include WWOR-TV New York, KCOP-TV Los Angeles, WPWR-TV Chicago, WTXF-TV Philadelphia and KBHK-TV San Francisco.

Program Syndication Services' *Morning Stretch*, fitness program, will mark its 10th year beginning with the next season. The series, available via barter, has clearances in more than 100 markets, representing 78% of the U.S. These include WABC-TV New York, KTTV-TV Los Angeles, WMAQ-TV Chicago, KYW-TV Philadelphia and WRC-TV Washington.

Viacom has sold *Trial by Jury*, Raymond Burr-hosted series, to 100 markets, including all of the top 10. Four of the series top 10 clearances are NBC-owned sta-

The marketplace is such that because of the unusually large number of sitcoms available for 1989 and beyond, stations have a choice of product, he continues. "Each of the shows is a little different, and buyers have to take more time to research each one, and it takes a lot of time so, consequently, it takes longer on the part of syndicators to sell a sitcom if the prices are to be maximized. "If you just want to clear markets, and some distributors are not producers, then it can be done, but prices will suffer. In our case, with 227 doing well on the network and now in its fifth season, we are not in a hurry just to clear markets."

Today, according to Thurston, you may have to go back to a city more than one time. "The response time is much longer. The stakes the prices are still very high for the station, and they are more cautious and have more choices."

Thurston says Columbia has not yet gone into other major cities on 227 such as Boston and San Francisco, which has to do with timing in the marketplace. But other stations sold on 227 include indies WPTY-TV Memphis, WDRB-TV Louisville, WFLX-TV West Palm Beach, and affiliates such as KOLD-TV Tucson, CBS affiliate; WJTV(TV) Jackson, Miss., CBS; and WFAV-TV, NBC station.

Prices spotty. Prices for 227 generally have been "spotty," notes Thurston. "But the marketplace is strong enough today so that if you correctly price the program you will get your price. We are getting what we want for our purposes. Comparing the 227 pricing levels with *Boss* and *Cosby*, they are lower but higher than the market has been. So from that standpoint, it's a healthy marketplace."

"In any case, I think the market is cautiously optimistic today. Advertisers have been very strong up-front and are coming back, first with the networks and ultimately filtering into the spot marketplace. I think the fourth quarter and next year will be a good one for syndication. I don't know whether we will see double-digit ad increases, as we have seen, but there is optimism among the station community that the worst is over."

ABC, NBC do 'wheel' realignments, add five new spokes in new season

Although ABC's and NBC's "wheel"-formatted series did not meet their expectations last season, largely due to production delays by the lengthy writers' strike, the networks are confident *Mystery Movie* and *The Magical World of Disney* will improve in the primetime season ahead.

Mystery Movie, which did not bow until the first quarter, averaged a 24 Nielsen share for ABC last season and ranked 28th in household ratings. NBC's *Disney* tallied a 17 share last season, ranking No. 64 in household ratings.

To accomplish their projected ratings upticks, both networks have retooled some of the rotating "spokes" in their wheel anthologies. ABC scrapped Lou Gossett Jr.'s *Gideon Oliver*, the lowest rater among the three *Mystery Movie* elements, while NBC shelved *Davy Crockett*, *The Absent-Minded Professor* and *McCall*. Joining the ABC program this fall will be two new series, starring Telly Savalas and Jaclyn Smith. New to *Disney* will be *Brand New Life* and *Parent Trap III*, two family-appeal series.

Savalas, Smith signed. Savalas will revive *Kojak*, a longtime CBS series hit, while Smith will star in *Amanda Vanderbilt*, as a wealthy San Francisco lawyer. *Kojak*, which began as a TV movie, served as a weekly one-hour series from 1973 to 1977 and had lately been revived as two-hour CBS movies.



Burt Reynolds

They join the two renewed *Mystery Movie* features from Universal, Peter Falk's *Columbo* and Burt Reynolds' *B. L. Stryker*.

Last season, Alan Wurtzel, ABC's senior vice president of marketing and research services, pointed to *Mystery Movie* as one of the network's two bright spots—its Friday success being the other. He called the anthology "an important chip for us," as it could bolster a two-hour block elsewhere and thereby help solve ABC's big weakness, hourlong dramas. "Our hours are problems, clearly," he said. Looking ahead to fall, Robert Iger, ABC Entertainment president, predicts that the anthology "should significantly improve Saturday" against relatively weak CBS competition. CBS execs, meanwhile, had not expected ABC to slate *Mystery Movie* on that night, given its high production costs.

Apart from the summer season, it has been rare for the Big 3 to program movies on a Saturday night, given erosion due to movie-going as well as at-home viewing of movies via pay cable and home video. A year ago, when ABC first planned *Mystery Movie* for Saturday, before ultimately switching to Monday, key buyers at Campbell Mithun Esty, BBDO and J. Walter Thompson USA were among those praising the strategy. "It could make a lot of sense," says one, "since they're going after those who rent videocassettes and watch movies on cable by using established stars." The anthology should have strong 18-49 adult appeal, says another.

Saturday gains seen. Bozell's fall '89 season analysis predicts that ABC's slotting of *Mystery Movie* on Saturday "should improve the [9 to 11 p.m.] time period" for ABC. However, NBC will continue to sweep the night and CBS' *Paradise* may run second between 9 and 10 p.m., the agency feels. Meanwhile, Saatchi & Saatchi Advertising's fall report also foresees that "ABC's [Saturday] position should improve on the strength of *Mystery Movie*, with CBS' western and war dramas in third."

As for NBC's *Disney*, Brandon Tartikoff, president, NBC Entertainment, labels that a "clearcut

president and CEO of the New World Television Group since joining the company in July 1986.



Edward Gradinger

Norman Horowitz, president and CEO of **MGM/UA Telecommunications**, has resigned. His decision to leave was based on the pending finalization of the Qintex buy of MGM/UA.

Buena Vista has restructured its sales department, with four executives hired. These are **Mort Marcus**, senior vice president, sales; **Rick Jacobson**, vice president, general sales manager, west; **Ken Solomon**, vice president, eastern regional manager; and John Bryan, executive director, southeast regional manager. Also, **Peter Affe** becomes vice president, sales development. Affe has been vice president of East Coast operations.

Lon Feldman has been promoted from director to vice president, syndication post-production, **Columbia Pictures Television**. Before that, Feldman was assistant editor at Embassy Pictures.

Donald Micallef has been named vice president, research and development at **Worldvision Enterprises**. He had a similar job at MCA Television. Before that, he was with Katz Communications, in several positions.

Andrew Holtzman has been appointed vice president, creative services at **Orbis Communications**. He comes to Orbis after six years as head of creative services at LBS Communications. Prior to LBS, Holtzman was manager of domestic and international television promotion at Paramount Pictures.

Jerry Weaver has been promoted

to senior vice president, **Genesis Entertainment**. Weaver, a 30-year industry veteran, was vice president, public broadcasting. Prior to joining Genesis in 1983, Weaver held positions with the Central Education Network, 15 Telecommunications and Kentucky Public Television.

BPME directors

Linda Nix of WDSU-TV New Orleans has been named president of the Broadcast Promotion and Marketing Executives for the 1989-1990 term. Bert Gould, WCBS radio in New York, will serve as president-elect. Other officers elected were Erica Farber-Viola, from In-

terep, vice president/treasurer; and Nancy Smith, Canada's Global Television Network, was elected secretary.

Directors elected for a second term include CBS Radio Networks' Gordon Hope; Alan Morris of ABC Television; Bill Natale, WTTG-TV Chicago; David Salinger, KRON-TV San Francisco; and Group W Productions' Owen Simon.

Among the newly elected board members are Bob Klein of Klein &; and Lloyd Trufelman, Cable Advertising Bureau. Among those elected for first board terms, replacing departing board members earlier this year, is Peter Smith, Pulitzer Broadcasting, based in St. Louis.

Bozell: Black household television viewing 44% higher than nonblack

Black households watched an average of 44% more television than did nonblack households last year, according to a survey taken by Bozell. In addition, blacks and nonblacks were found to have different preferences in programming and in series, and black households watch substantially more daytime TV as well, especially soap operas.

According to research conducted by Steve Sternberg, vice president/manager of broadcast research at Bozell, blacks watched 74.1 hours of TV per week in 1988, compared to the 51.4 hours weekly watched by nonblacks.

The study points out that one reason why blacks watch more TV than nonblacks is that black households have fewer alternate viewing options; cable penetration is about 40% in black homes compared to 55% in nonblack homes.

Regarding program differences, only four of the top 10-rated programs among blacks are also in the top 10 for nonblacks. The shows that fall in both lists are *The Cosby Show*, *A Different World*, *The Golden Girls* and *Cheers*. The four top programs among blacks have black casts, the study finds.

Both groups preferred sitcoms, but blacks chose police or detective shows as their second choice, which was the largest disparity between blacks and nonblacks in primetime viewing, while the second choice for nonblacks was feature films. Two

shows, *Amen* and *227*, which feature black casts, ranked third and fourth among blacks but fell to 37 and 42, respectively, among nonblacks.

Biggest hit. The season's biggest hit, *Roseanne*, on the other hand, ranked second among nonblacks, but 11th among blacks. Other examples are *Murder, She Wrote*, sixth among nonblacks, 23rd among blacks; and *L.A. Law*, 10th among nonblacks, 35th among blacks.

The Fox network did well with blacks, according to the study. The network was found to have a proportionately higher number of blacks watching than did the Big 3, with Fox doing especially well among black men 18-34.

In daytime, ratings among blacks for soaps averaged more than twice that of nonblacks, the biggest difference for any daypart or group. Despite the ratings differences, blacks and nonblacks generally watch the same daytime programs, much different from the primetime situation.

Eight of the top-rated 10 daytime shows fall into both groups.

Also, the study notes that NBC's recently launched daytime drama, *Generations*, which has blacks in lead roles, may have started a trend as the networks recognize the high proportion of black viewers in the daypart.

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tions in New York, Chicago, Washington and Cleveland. The series premieres Sept. 11.

All American Television has added WNBC-TV New York in the station lineup of *Crime Stoppers 800*. Other stations on the list include WGBO-TV Chicago, WTVT-TV Tampa-St. Petersburg, WMAR-TV Baltimore, WKRC-TV Cincinnati and WRCB-TV Chattanooga.

LBS Distribution has signed all the NBC-owned stations for *The Billy Martin Celebrity Roast*, one-hour variety special. Available for a Sept. 30–Oct. 22 window, adjacent to Major League Baseball playoffs and World Series, it will be taped in Atlantic City.

Multimedia Entertainment has sold *Donahue* to Network Ten in Australia. The show is in 212 markets domestically and five countries overseas.

In a six-year license deal, **Genesis Entertainment** has cleared 115 stations covering 81.7% of the U.S. for *The Best of the National Geographic*. Recent sales include WLWT-TV Cincinnati, WTTW-TV Chicago, and WNYB-TV Buffalo. Other major markets that have committed for a six-year license period are KOIN-TV, Portland, WJLA-TV Washington, WSB-TV Atlanta, WWL-TV New Orleans and WWOR-TV New York.

Worldvision Enterprises will launch *A Question of Scruples*, strip talk show, for the fall 1990. The show will be produced by Sunbow Productions, and is inspired by the board game.

Orbis Communications will distribute a new version of *The Joker's Wild*, to be launched for the 1990 season on a cash-plus-barter basis.

Zooming in on people

Edward Grading has been named president and CEO of **New World Entertainment**, and **Jon Feltheimer**, president of **New World Television**. Grading has been

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July 24, 1989

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Assisted by Campbell-Mithun-Esty, Television Bureau of Advertising is following up on the National Assn. of Broadcasters pitch, calling on stations to lend a hand in a campaign for free TV./91

STRETCHING SPONSOR DOLLARS

Telemundo's Spanish-language KTMD-TV Houston-Galveston is aiming to capture 30% of the market's Hispanic dollars by involving vendors, local manufacturers' reps and brand managers./91

SPOTLIGHT ON...

Starting a new Spanish-language radio station in Chicago, Arturo Velazquez of WOPA finds his path paved by "a new pride in Chicago's Hispanic community."/95

SELLER'S OPINION

It's time that TV and radio stations stopped pouncing on print advertising and found ways of complementing it, says Tom Burkhart of Marshall Marketing & Communications./96

Double the coupon redemption doubles WQBA campaign advertisers

Bill Brittan, direct marketing coordinator for Spanish-language WQBA AM-FM Miami reports coupon redemption levels tracking "at double the market average" for his campaigns combining Spanish radio advertising with direct mail targeting Hispanic households.



Brittan says these marketing tactics work so well that clients came back for more, "prompting us to schedule two more programs like it." Participating advertisers, he says, have included Procter & Gamble, Keebler, Kraft Light'n Lively Yogurt, Beech Nut, Mahatma Rice, Quaker Oats and Vidal Sassoon.

Double the advertisers. As of June 1, Brittan says, WQBA still had 90 days left to present its October execution, the station's fourth since it launched its double-barreled, radio-plus-mail approach, and already had "a record number of advertisers signed up. In fact I anticipate double the number we had with us for our March execution."

These included Nestle Foods, Rich Products (coffee), General Foods, Rivana Foods (Carolina Rice), Beatrice County Line Cheese, Kahn's Meats (Hillshire Farms), Publix supermarkets, Home Depot (building and home improvement supplies) and Sea Escape Cruises.

WQBA is tying its October two-media execution in with the fact that October will be Hispanic Heritage Month. Brittan describes this as "a commemoration of Hispanic culture that's going to assume growing importance because Miami has been designated host city for the celebration of the 500th anniversary of Columbus' discovery of America in 1992. So our October mailing focuses on the Hispanic Heritage Month theme. And it will include a sweepstakes with a package of prizes whose total value will add up to over \$100,000. The prizes

KTMD-TV 'makes merchandising stretch sponsors' dollars'

(from page 91)

these nations to decorate their booth with their national colors and to sponsor talent representing the music, singing and dancing styles traditional in their homeland. And each country will serve the culinary specialties for which their countries are noted, and show off products made by their countries' artisans."

Mendez adds that several of the international airlines will also sponsor booths: "There will be the national airlines of Mexico, El Salvador and Venezuela. All offer direct flights between Houston and their home-country capitals."

Newscast in Spanish. Although the Telemundo O&O has been in business only a little over a year, Mendez says KTMD offers the only daily televised local Spanish language newscast in Houston. Other local shows produced by KTMD are described in the February issue of *Hispanidad*.

Nuestra Gente is a weekend community affairs program offering "in depth information about issues that affect Hispanics on a local, national and international level. . . . This is followed by *Galveston, La Isla Bonita*, a 30-

minute program produced on location for the Hispanic community of the island city. It highlights the uniqueness of Galveston, its traditions, culture and history. There are almost 50,000 Hispanics living in this area, and they are a very important segment of the market."

Mendez also reports that KTMD "became the Immigration and Naturalization Service's primary vehicle in Houston to inform the public about its amnesty program. Houston is second, only after Los Angeles, in the number of amnesty registrations, with some 120,000 persons registered. This incredible addition of new residents, plus continued immigration into this area from troubled Central America, now numbering 1,000 applications per week, should make Houston one of the top five U.S. Hispanic markets in the 1990 census."

In the public service arena, Mendez says KTMD "conducted the largest voter registration drive among Houston Hispanics last year. And we followed Hurricane Gilbert's destructive path last September as no other station here. When Gilbert hit Mexico and flooded its second largest city, Monterrey, KTMD led a caravan of 11 trucks, carrying 32 tons of food

and clothes donated by Houston Hispanics, and delivered it to the hurricane victims."

He adds that KTMD has formed an Advisory Community Board of Hispanic professionals who donate time to help people caught up in emergency situations and who "help unite our community for such common causes as the very important bond election for improvement of Houston's schools. Some 40% of our school enrollment is already Hispanic, and it's estimated that this will grow to become a majority in the early 1990s."

Mendez started his broadcasting career with Tichenor Media Systems in Harlingen, Texas, later bought KIFN AM-FM Phoenix (now Spanish language KVVA), then became general sales manager of KDTU-TV in Tucson, Ariz. before starting up KTMD-TV for Telemundo. And just this April Mendez was named to fill an appointed seat on the National Association of Broadcasters' Television Board of Directors. As a director, he succeeds Daniel Villanueva, formerly general manager of KMEX-TV Los Angeles, and now a roving corporate consultant for KMEX parent company, Univision. (See *In the Picture*).

TvB counting on station support in campaign for free television

While one agency, Lintas: U.S.A. is telling clients that mass media like network television are no longer the way to go, another agency, Campbell-Mithun-Esty, is helping the Television Bureau of Advertising show the whole country, including every agency's clients, plus every station's retail advertisers and prospective advertisers in every market from coast to coast that television is still the most powerful mass medium, as it was in the '60s and '70s.

TvB's plans call for following up the National Association of Broadcasters' call for all stations to localize the Free Television (vs. pay cable) campaign kicked off by Walter Cronkite on July 17 with its own call for stations to climb aboard TvB's year-long Turn on the Power drive, set for a January start, with donations of spot inventory.

Air value \$100 million. TvB president William G. Moll is suggesting inventory to the tune of 10 spots a week for 52 weeks, whose on-air value could run up to as much as \$100 million. Eight of the 10 units to run each week throughout 1990 will be created by CME "to use the power of television to sell the sales power of television." The other two will be sold to national advertisers by TvB or by a TvB-designated agent, with the proceeds earmarked to pay for the television creative work plus collateral sales material, plus supporting print advertising in both the advertising and television trade press and in the most influential consumer magazines.

Moll says the campaign has already been endorsed by the affiliate advisory boards of ABC, CBS and NBC, the Free TV Steering Committee, the president of the Assn. of Independent Television Stations (INTV), and by TvB's own National Sales Advisory Committee and board of directors. He adds, "Because of the importance of this campaign to the entire broadcast television industry, it will be open to participation by both TvB member stations and nonmember stations.



William Moll

Richard Johnson, CME chairman and chief creative officer—New York, describes two basic on-air campaigns: an "image campaign" to demonstrate the scope, power and effectiveness of television, the variety of its offerings

"and its role in society and family life, now and in the years to come."

He says the second campaign is "a retail campaign designed to show some of the specific outstanding successes local advertisers have achieved by using free commercial television."

Moll explains that both campaigns will run concurrently and in conjunction with major promotional events, developed by TvB and CME "that will bring all stations in a market, affiliates and independents alike, together with their local advertisers and media buyers. This should provide stations with revenue-producing sales opportunities and collateral merchandising materials relating to the project will be developed and provided to participating stations."

Plans call for the Turn on the Power campaign to premiere in January "with a major television event. It will be a programming spectacular involving some of the industry's most creative people."

KTMD-TV 'makes merchandising, promotion stretch sponsors' dollars'

Mauricio Mendez, vice president, general manager of Telemundo's Spanish-language KTMD-TV Houston-Galveston, expects to capture over 30% of the Houston market's Hispanic dollars this year "because of our unique use of merchandising and promotion that stretches national advertisers' dollars. It involves vendors and the advertisers' local manufacturers' reps and brand managers."

Mendez says his salespeople "maintain continuous communication with the key people at every link of our advertisers' distribution chains about our promotion activities. We show them how we're selling advertising *plus* the promotion." As an example, he says, "Besides its 20 spots a week on KTMD, a Procter & Gamble can participate in our International May Festival at El Mercado del Sol."

National booths. This is a big park adjacent to a shopping center. Mendez says advertisers sponsor booths at the festival, set up displays and sample their products to



Mauricio Mendez

the crowd. He explains that the festival is international because "several Latin American countries will have booths: countries representing the growing diversity of Houston's Hispanic population. There will be booths representing Mexico, El Salvador, Nicaragua, Argentina, Cuba, Colombia and Venezuela. We've invited the consulates of

(continued on page 92)

Wayne Cornils has joined Transtar Radio Network as vice president/communications. Cornils had been executive vice president at the Radio Advertising Bureau and before that senior vice president for radio with the National Association of Broadcasters.

Dorothy A. Marsh has been promoted to station manager at KSCI-TV Los Angeles. She joined the station last year from World Enter-

tainment Division and now steps up from director of business affairs.

Gordon T. Hughes II, vice president, station manager of CBS-owned WCAU-TV Philadelphia, has transferred to New York as vice president, marketing services for CBS Television Stations. He started with CBS in 1962 on the news assignment desk at KNXT, now KCBS-TV Los Angeles.



Jerry Lopes has been appointed vice president, news and sports programming for the three Sheridan Broadcasting Networks. He joined Sheridan in 1980 as news director following over four years with WHDH/WCOZ(FM) Boston.

Representatives



Linda Thompson has joined HNWH as sales manager of the rep's St. Louis sales office. She moves in from the sales staff of KEZK(FM) St. Louis to replace **Cheryl Collins**, now regional manager in the Interep company's Chicago office.



Kevin Garrity has joined Group W Radio Sales in New York as an account executive. He had been with the sales staff of WABC New York, specializing in sports sales.

Judith T. Pillow has been named manager of the Atlanta sales office of CBS Television Stations National Spot Sales. She recently returned to CBS from MMT Sales and now steps up to succeed **Carl Miller** who transferred to New York to head the CBS National Spot Sales office there.

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Television/Radio Age

1270 Avenue of the Americas New York, N.Y. 10020

include a new single-family home, a shiny new car and a family vacation in Spain."

He says most of the national advertiser participation in the WQBA mailing is in the form of coupons, while most local participation is ad inserts. And he says "The chief difference our mailings offer is that instead of merely mailing to the heavy Hispanic zip code areas, the way many other mailing lists are made up, our mailing becomes more dispersed as the Hispanic population itself becomes more dispersed."

Helpful tax law. He explains, "Our mailings are addressed to Spanish-surnamed homes as verified by this state's homestead exemption list. That is, every home owner who files with the State of Florida is entitled to a \$25,000 property tax exemption. So naturally, every homeowner files."

For an idea of what he means by spreading population, Brittan says South Florida's Hispanics are spreading so fast that "Only 10 years ago, 90% of South Florida's Hispanics could be found in just 15 to 20 ZIP codes, all in Dade County. Now probably only 40% live in

those same 15 to 20 ZIPS. And the people who supply our mailing list tell us there are now 50,000 Hispanic households even in Broward County [Fort Lauderdale]. Up to recently Broward was pretty well limited to WASPs."

Brittan adds, "For some products, of course, our radio and mail program is more useful than for others. Folger for instance, has no reason to promote product trial in

the general market, where so many consumers are already heavy users. It would cost them millions to offer a dollar to every Anglo who already prefers Folgers. On the other hand, most Hispanics here use their own coffee blends. So this is a way for Folgers to promote trial among a large light-using group without going broke giving away dollars to all the heavy users who already like it and buy it."



Working out sweepstakes details are, from l., WQBA's Bill Brittan; George Hyde, vice president, general manager; Orlando Camps, vice president of Andrade Enterprises, the developer whose house is the grand prize, and Tomas Garcia Fuste, WQBA's director of news and programming.

Appointments

Stations



Eigner



Pope

Michael Eigner has been named executive vice president and general manager of Tribune Broadcasting's WPIX-TV New York. **Leavitt J. Pope** continues as president of WPIX Inc. and will also assume certain Tribune Broadcasting group responsibilities, continuing to report to Tribune Broadcasting president **James C. Dowdle**. Eigner transfers from Los Angeles where

he had been vice president/station manager for Tribune's KTLA(TV).



Jim Rupp, president and CEO of Midwest Communications, will serve as acting general manager of WCCO-TV Minneapolis-St. Paul until a successor is selected for **Ron Handberg**. Handberg retired as vice president/general manager on June 30 following almost 30 years with the station.

Al Smith has been appointed executive vice president of Henry Broadcasting Co., replacing **Greg Reed**, now president of RPM

Broadcasting. Smith had been general manager of Henry's KRSO/KDUO(FM) San Bernardino-Riverside, Calif.



Rick Mack has been named vice president and general manager of Summit Broadcasting's WCAO/WVEE(FM) Baltimore. He came to the station in 1985 and now advances from general sales manager.

Alan Frank, general sales manager of WTOG-TV Tampa-St. Petersburg has assumed added responsibilities as station manager of the Hubbard Broadcasting property.

One Seller's Opinion



Broadcasters advised to change strategy to attract retailers

Burkhardt

Our current broadcast economy has generated a multitude of task forces, ad-hoc committees and other groups intended to improve the pacing of spot that began a downward spiral a couple of years ago. And it appears that stations are finally realizing it is futile to bash one another: that they should instead look for "real" development funds—from dollars currently invested by retailers primarily in newspapers and in direct mail.

Generally station group heads, leaders of the TvB and RAB and station managers are ready to charge full speed ahead to pounce on newspapers' glaring weaknesses: dipping circulation with subsequent declining penetration and the inevitable price increases. This sounds logical, but here's where we hoist the caution flag. Your motives are right, but you are not dealing with a logical subject. You are entering an arena that's often foreign to the broadcast experience: the economic reality of retailers' commitment to print.

Most broadcasters know that most retailers' print dollars are vendor funded, and that station vendor programs are generally successful. But many broadcasters are either not aware, or are reluctant to admit, that print works. If not, why would a recent Retail Advertising Conference summary indicate that this year retailers will commit 55% of their funds to newspapers, 14% to direct mail and only 10% to television? Because the dynamics are still favorable and history suggests security with print.

For years I have served the retailer in many capacities. I have been one myself, have been their agency, and have made presentations on behalf of broadcasting to draw dollars from print. I'm certain that, like me, many of you lay claim to some success. But the broadcasting industry as a whole has failed miserably. And until I see some mindset reversal, I'm afraid it will continue to fail.

Attacking print from the obvious angle won't work. If your intent is to inform retailers that print circulation is down, readership is down, young people don't read newspapers, etc., forget it. Attacking or "bashing" print to a retailer, especially one with grey temples, is only insulting his or her intelligence.

Why not, instead, consider an approach that is working with some stations already? It is one of simple synergism. Instead of going head-to-head against print, use local market-specific research to show how your station can bolster print, enhance ad readership, and improve the retailer's efficiency in reaching chief shoppers, totally integrated demographically and psychographically. If broadcasters learn to speak in terms heretofore foreign to them but are vernacular to retailers, there is hope. It's simply a matter of communications, but for years a language barrier has existed between retailers and broadcasters. It's time for this to change. But the onus is on the men and women of the broadcasting community. With few exceptions, I haven't heard of retailers breaking down the doors of radio or television stations.

Retailing, like football, is a game of inches—column inches. How long, broadcasters, will you remain in your current mode of attack? You must change. If you do, the direction of your business can change.—**Tom Burkhardt**, *director of marketing, Marshall Marketing & Communications Inc.*

Agencies



David Wurfel has been elected a vice president of Ogilvy & Mather Chicago. He joined the agency last year from a planning post with D'Arcy Masius Benton & Bowles and now at Ogilvy is national broadcast buying supervisor.



Debbie Annes has been promoted to research supervisor at BBDO Chicago. She came to the agency three years ago and now steps up from senior research analyst. She reports to vice president, group research director **Elaine Collina**.

Nicholas Luciano has been named vice president and director of media services at Glazen Advertising, Cleveland. The former Needham, Harper & Steers media executive has most recently been director of media services for the Seven Up Co. in Dallas.

Kim Bartel has been promoted to associate media director at Della Femina, McNamee WCRS-Boston. She joined the agency in February from Foote, Cone & Belding/Chicago and now advances from media supervisor.

Judy Brown is now a full-time media planner/buyer for Ken Schmidt Co., Inc. in Milwaukee. She first came to the agency in 1983 as an administrative assistant, and since 1985 has worked part time as an assistant buyer.

Spotlight On...

Arturo Velazquez



*President,
General manager
WOPA Chicago*

Arturo Velazquez, head of new Spanish language station WOPA Chicago, starting up this summer against WTAQ and Tichenor's WIND/WOJO(FM) combination, points to "the tremendous political progress" that both stems from and adds to "a new pride in Chicago's Hispanic community."

Velazquez observes, "Chicago's city treasurer is Hispanic. So is the commissioner of the General Services Administration, Chicago's Deputy Mayor for Education and the head of Chicago's Office of Manpower Training. Our fire commissioner is Hispanic, and so is our deputy superintendent of police. All these top city officials are highly qualified and dynamic profession-

als, many of them surprisingly young."

He points out, "So many successful municipal officials serve as an inspiration to our young people, and their achievements are a source of real pride to all of Chicago's Hispanics. Their success also demonstrates to our people the great value of being informed and active players in the political process. It was just such participation in the system that made all these officials' success possible."

Velazquez says still more evidence of Hispanic pride "can be seen in the degree to which our college graduates return to our community as teachers, or to go into retailing here, or to join with us in the media. Some of them come with our own Spanish-language media, and others become part of Chicago's English-language media as journalists, reporting on what's happening in our community and getting the facts about our progress out to their even larger audiences in the general market."

Velazquez concedes that his new station is up against some tough competition that's served Chicago's Hispanic community for a number of years. His reply is that he and his partner, Jose Antello, were "born and raised, here in Chicago. We're both very active in the community here, so we feel a special responsibility to operate WOPA in the best interests of Chicago's Hispanics. Our primary demo will be 18 to 49, and we'll be targeting it with an identifiable format with strong air personalities, the most popular music and a strong sports presence."

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Westinghouse Broadcasting Company

FEEDBACK

In what advertiser categories do you expect to see the greatest growth in national spot activity in the second half of this year?



"We're looking for increased growth in automotive, package goods, movies and a slight improvement in kids' business. We do economic forecasts every quarter, and our most recent one shows, for example, that Detroit will continue to spend heavily and that Hollywood is turning out the movies."

*Raymond J. Johns
President
Seltel Inc.*



"It's fairly clear that the automotives will lead the way. They were a strong first half category for spot, and with auto sales soft lately, we expect Detroit to come out with their big guns to keep sales moving. Other strong categories should be movies, which will be following up on their big box office successes this summer, the oil companies, and insurance companies."

*Harry Stecker
Executive vice president,
Director of client services
Petry Inc.*



"We expect automotives to remain strong and, combined with fast foods, to represent an aggregate total of 20% of the spot market in the remaining two quarters. Why? Because autos are highly competitive and there is a lot of unsold inventory. This requires heavy promotion on TV to help sales. Also, we see a resurgence of spending in package goods during the remaining half of the year."

*Pete Goulazian
President
Katz Television Group*

Wall Street Report

Ratings, quarter results compound analyst evaluation of King World stock

King World, which just showed some impressive figures in both the May sweeps and its third quarter earnings, is high on the list of buy recommendations by Oppenheimer & Co. While there had earlier been some concern about declining ratings for its programs, *Wheel of Fortune*, *Jeopardy* and *The Oprah Winfrey Show* came out first, second and third in the May Arbitrons.

For the third quarter ended May 31, KW reported a 26% gain in net earnings to \$11.6 million from \$9.2 million, with the per share equivalent up 28% to 46 cents from 36 cents. Revenues were up 31% to \$72.4 million from \$55.4 million. For the nine months, net income was ahead 25% to \$59.4 million from \$47.7 million, with per share up 33% to \$2.36 from \$1.77. Revenues gained 41% to \$303.5 million from \$214.8 million.

Oppenheimer analyst Dennis McAlpine is projecting per share earnings for the full year at \$2.90-\$3, compared with \$2.28 in fiscal '88 and says 1990 results will be \$3.30-\$3.40. He comments, "The stock has had two brief runs to the \$30 area, apparently due to speculation over a possible buyout of the company, allegedly by Andrews Group. When that failed to materialize, the stock backed down to the \$27 range. We continue to believe it unlikely that King World will be bought out and would view such speculation as specious."

He says that, based on his 1990 projection, the resultant price/earnings ratio of 8.3 to 8.6 makes the stock appear undervalued.

Belo estimates raised

Shearson Lehman Hutton has raised its earnings estimates for A. H. Belo and is maintaining its buy recommendation. Analyst Alan Kassan says, "We now expect second quarter profits to be in the 40 cent area vs. 30 cents last year. For 1989, we are raising our earnings per share estimate to \$1 for 80 cents. Our 1990 EPS estimate is being raised to \$1.65 from \$1.20 to reflect the improving lineage trends and weakening newsprint costs.

"In 1991, given the positive leverage from an economic rebound in Texas and the higher market share position of *The Dallas Morning News*, EPS could be as high as \$2.65." He notes the stock has been strong since the first quarter earnings report, moving to the mid-30s from the mid-20s. "However, based on the positive earnings leverage we see developing over the next few years, we are raising our estimated private market value to \$59 from \$53."

Kassan observes television revenues are up modestly, with benefits from higher ratings at WFAA-TV Dallas offsetting weakness at KHOU-TV Houston.

Century held good value

On a longterm basis, Century Communications is sized up by Shearson as a good investment. Says analyst Christy L. Phillips, "We continue to believe that Century should be a core holding for those desiring exposure to both the cable television and cellular telephone industries, and at the current prices, Century continues to represent a significant opportunity."

It's not the immediate earnings potential that drives this recommendation. Century lost 18 cents per share for the 1989 fiscal year ended May 31, and Phillips projects losses to be 64 cents in 1990 and 60 cents in 1991. But she notes, "As a result of the continued asset appreciation in the cellular telephone industry by cellular licenses, we are raising our 1990 and 1991 private market value estimates as well as the corresponding price targets for Century shares."

She estimates that Century's cellular licenses have increased in value from some \$4.15 per share to approximately \$10.61 per share, noting the resultant private market values for fiscal years 1990 and 1991 have increased to approximately \$33 and \$35 per share respectively. Phillips comments, "We believe the shares should trade at nearly 75% of estimated private market values, yielding a price target of \$25-26 per share."

UAE recommended

Merrill Lynch is recommending accumulation of the shares of United Artists Entertainment, formed May 25 by the merger of United Artists Communications and United Cable TV, the latter being the nation's third largest cable system operator. UAE is also the nation's largest motion picture exhibitor and has investments in cable TV programming, video rental stores and foreign cable system and theater exhibition businesses.

Edward T. Hatch, vice president at Merrill Lynch, says, "Our 12-18-month price objective for the shares is \$23-27 based on the stock trading at 75% of our \$36 per share 1991 estimated asset value, a level at which cable stocks have typically traded." The stock has been trading just under \$20.

"By 1992," Hatch says, "the shares could sell in the low to mid-30s based on a similar public valuation of our \$43 per share asset value. If UAE were to restructure its theater operation or sell underperforming real estate assets near term, asset values could grow faster and our price targets may be reached sooner."

He comments that the operating momentum at UAE will largely be driven by the United Cable TV group. He estimates that, between 1989 and 1992, subscriber and cash flow growth could exceed 6% and 20% annually. "The incremental profits from new customers combined with lower costs and selective rate increases are expected to boost margins from about 42% in 1988 to 52-54% in 1992.

"UA Cable is maturing. While subscriber growth is projected to rise 4% annually, margins already approach 50%. In our view, further margin expansion could be limited due to rising programming and marketing costs. Thus, cash flow may rise 13-14% annually from this level through 1992."

Baseball stations ad it up (from page 27)

auto accounts have been in the games. These include Nissan Motors, Chrysler-Dodge, Tri-State Ford Motors and Mazda. The different types of sponsors for the Yankees' games have been "incredible," says Appel, "everyone from American Express to Wilkinson Sword to Johnson and Johnson. *The Daily News* is a substantial advertiser in every game." Marine Midland Bank has a major sponsorship, replacing Citibank.

Sales for the San Francisco Giants telecasts are running better than they did last season, says Jeff Block, general sales manager at KTVU, the ballclub's flagship station. "Sales were pretty good before the season started," he says. However, he continues, the competition in the market, KPIX, which originates the Oakland A's contests, "was doing gangbusters. They were coming off being the American league champions last year and got a lot more of the upfront sizzle than we did. But we did well, and now we are moving into an advantageous position because the team is doing so well now."

Heavy competition

The competition for the ad dollars between the two stations is heavy because fans of both clubs are spread out. "Fortunately for us, there are more Giants fans than Oakland fans."

Heavy hitters for the Giants telecasts are Toyota, Pacific Bell, Safeway Supermarkets, Goodrich, Uniroyal, and Chevron gasoline, as full-sponsorship incumbents. KTVU has minisponsorships with Shell, Nissan and BMW. Also, spot business is doing very well. "That's one of the advantages of being in first place. When you get closer, everybody wants the games," says Block, "so the last-minute demand is really strong."

Demand by advertisers is high this year, according to KPLR's Fulstone. The major food chain in St. Louis, Schnucks, is a major player, along with Hardees. "The spot business has been doing well, including chain saw manufacturers and automotive parts people." True Value Hardware is a new

sponsor. Fulstone says that the majority of KPLR's St. Louis Cards business comes from full-season sponsors.

"That's because these advertisers see beyond it being a "great media value. They see what it means for identification and uniqueness of positioning."

The fact that the Cards are a strong competitor for the division title has helped sales, notes Fulstone, but the station's baseball promotion has pushed up sales as well. "In fact, we got an honorable mention by the INTV as having one of the best sales kits made on baseball. Also, our billboard on a bat and ball won both a local and a national award. On-air promotion also won an INTV award and an Emmy."

Attendance for the Cards is up, notes Fulstone, and part of that is because of the station's year-around effort in sales. "We try to keep the Cards in the public eye, doing Christmas greetings from them and other things, so it's just not seasonal."

The Reds' WLWT has been sold out in the telecasts since the beginning of the season, says Paddock, and the station has had to resort to using extra inning breaks to satisfy advertisers' demands. On the station's Reds network, which consists of 22 markets, advertisers are Anheuser-Busch, Toyota, Valvoline and Community Blue Cross-Blue Shield. The network games are given to the stations on a barter basis,

Bob McGann of WCCO-TV Minneapolis points to strong on-air performance for the Twins games.



says Paddock, and they are given 50% of the inventory to sell locally, while WLWT sells the remaining 50%.

For the station alone, advertisers include Ford Dealers, Hardees, Taco Bell, Crush, Pepsi-Cola, Sears products and All-State Insurance as all-season sponsors. Among new ones are Crush and Valvoline.

Sales for the Baltimore Orioles games via its flagship station, WMAR-TV Baltimore, were flying preseason, says Howard Zeiden, vice president, sales, at the station. "We had only one nonreturning sponsor for the 1989 season," he notes, "and that was because the nonreturning person filed bankruptcy." The demand to get on the station has been stronger since the team became a strong contender and now leads the American League division (as of presstime), he notes.

Strong upfront sales

"Our preseason upfront selling was very strong in spot, and there was a strong push on the national side. Much of the activity at the beginning was because the Orioles went through a lot of player changes, says Zeiden. "There are only four or five players that remain from last year's team. Everyone else is new, and some have exceeded expectations. Also, defensively, we have one of the strongest teams in baseball, and there was a lot of excitement built because talk was the Orioles were going to put a real representative ballclub on the field."

Zeiden says that because of the new Orioles moves, the station's sales approach was that "the Orioles are going back to the days of old." The Orioles' success on the field has increased attendance at the ballpark, according to Zeiden, although he didn't know the exact figures.

"On our part, we are trying to tie in more in-game promotions with our advertisers and some incentive programs with tickets for the games and bullpen parties and trips with the ball club."

As to advertisers, Zeiden says upfront major players include Anheuser-Busch, Nissan Motors and C&T Yellow Pages. Speedy Muf-



"We're really in the throes of getting a handle on the third quarter, but spot will be respectable—probably in a 3% to 4% growth pattern. We estimate about 20% to 25% of the political and Olympics spending of a year ago was incremental... Right now, the patient looks very good. In automotive, the pacing is going along okay but still lagging behind last year's third quarter. Categories with a little more life are package goods, retail stores and fast foods. Movie business also is strong. For the fourth quarter, network upfront is very strong, especially automotive, which should, I believe, bode well for spot TV. Cable upfront has yet to be factored in, but spot should have a respectable fourth quarter."

*William Breda
Senior vice president and
general sales manager
Blair Television*



"Here's what we've seen so far, and hopefully it can continue in some shape or form. Theatrical movies have been strong throughout the year and particularly now and hopefully will continue at least through the summer. Our two biggest growth categories [so far] are personal and financial services and utilities, both with pretty good growth. Automotive has been a disappointment. We had a good first quarter, but automotive tailed off in the second and the jury's still out with cars for the fall. There are two scenarios possible. One is that all automotive money is spent upfront in network with not a lot left over for factory/dealer [spending]. The other is competition will be so great that a lot more money will come into spot."

*Edward Goldman
President
Group W Television Sales*



"We see both the automotive and toy categories strong for the back half of this year. We expect to see strong corporate local support for what we think will be heavy network introduction of several new car models. And from September until Christmas we anticipate that increased local investments by the toy companies will follow what's been the strongest upfront network market for the Saturday morning kids' block in several years."

*Jack Oken
President
MMT Sales, Inc.*

fler and Midas are also full-season sponsors. Bob Davidson Ford and Advance Business Systems are new full-season advertisers.

With the Rangers faring poorly on the field over the past few years, sales for the games have not come easily, notes KTVT's Mills, and ratings have generally suffered as well. Consequently, preseason sales were not easy to obtain, he contin-

MLB paper looks at results at networks

Bryan Burns, Major League Baseball senior vice president/broadcasting, recently prepared a white paper, "Major League Baseball and Television—A Look Ahead," which reviews the national implications of the CBS and ESPN agreements and how they will better serve baseball fans.

Highlights of the white paper are:

■ Ratings have steadily declined for baseball telecasts, with NBC's afternoon's games losing ground from an average of 6.4 in 1984 to 5.5 last season to a 4.8 so far though the end of May. ABC's primetime games did worse in relative terms, dropping from an average 10 rating in 1984 to an 8.1 in 1988.

■ In response to the downward trend, MLB sees the network and cable TV deals as producing more national viewers than the 40 nationally televised games did in 1988: some 221.4 million viewing households. But with CBS' 12 regular season games plus ESPN's 175 contests, MLB estimates the total will increase by more than 45% to 321.9 million.

■ The most noteworthy side effect of the agreements, according to MLB, is the opportunity for increased local telecasting of baseball games. "Contrary to popular belief, in each of the past five seasons, Baseball's clubs have increased the number of games available industrywide on local, over-the-air television."

■ Ratings for locally televised games have risen from an 11.8 Arbitron average of 20 reporting markets in 1984, to a 12.5 rating in 1987 and to a 13 in 1988.

ues, but with the Rangers now doing well on the field, sales have become much stronger, and starting with next season, "we will have good numbers to sell."

As to sales specifics this season, Mills says the station has fewer full season sponsors than last year and more flighted accounts.

"But we have a lot of pending second-half sponsorships for Ranger baseball this year, so if the team stays competitive and if the sponsorships come in, then we are looking for a good second half, which would make it a great year."

The good thing is, adds Mills, is that for "the sponsors that stayed with us and the ones that signed up this year," their ship has come in to some extent. It's their bonus that the Rangers are doing so well and we are up 3 rating points."

Lots of close races

What's helped both sales and ratings, points out Mills, is the tight races in both the American League divisions. "There are a lot of close races. In the west, there are four teams fighting it out, including us. And in the east, Baltimore, the top team (as of presstime) is the only one batting above .500, and you have all the good teams that are still asleep at the wheel. Other than the Tigers, everybody has a chance, and I would not count them out either."

WCCO's McGann says the station's Twins telecasts have been running at sellout levels from April through June, and he sees the upbeat sales continuing for the remainder of the season after the All-Star break. "We anticipate the ratings will improve, especially because we aren't going up against the stunting that occurred in the May sweeps. Too, the team looks like it will perform well, after a start that wasn't all that great."

Sales in general have been better than anticipated, says McGann. "We have a solid group of sponsors anchored by Anheuser-Busch, Norwest Bank, Hardees and True Value Hardware." The first three are new advertisers for the Twins' games, replacing Miller, Midwest Federal and Burger King. The beer franchise entailed a bidding process, notes McGann.



Douglas Moss of Madison Square Garden Network faced a new ballgame as Yankees cable rights holder.

The Twins "have captured this town," says McGann, "making sales do well. It's basically the same team that won the world Series in 1987. Attendance is very strong, although slightly below last year's record-breaker."

Meanwhile, the MLB deal with ESPN has some franchised stations in a quandry. At WMAR, Zeiden says he doesn't know of any of the TV rights holders that have "totally evaluated" how it will affect them individually. But Zeiden believes that all of the franchises will try to do so in a few months. "I'm not sure whether I understand all the ramifications of the home market telecasts. We have a meeting scheduled with the ball club to review all the policies. I would think that everyone else will do similar things."

"We start planning for the following year's baseball sometime in August, with tentative schedules and tentative marketing efforts." In any case, Zeiden notes the station is in the second year of a three-year contract with the Orioles and he's looking for the station to continue carrying Orioles games beyond that. "As of right now I see no reason why a new contract will not be worked out."

But, he adds, all the local stations will be taking a hard look at the ESPN and CBS deals, which may affect the growth of rights fees to the ballclubs. "However, I don't have all the facts regarding the deals, so I emphasize 'may.'" □

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In the Picture

Daniel D. Villanueva



As he leaves Spanish-language KMAX-TV Los Angeles after 26 years, 18 of them as general manager, he describes the more active political life and the work he'll be doing promoting education in his new post as roving corporate consultant for Univision.

KMAX-TV chief will work on education and political issues for Univision

"When Uncle Sam's in trouble, our boys don't go to Canada. They go to the Marines."

Reminded about the time he said that about his Hispanic boys a quarter century ago, when Uncle Sam was up to his chin whiskers in trouble in Vietnam, Danny Villanueva, now transferring from general manager of Univision's KMAX-TV Los Angeles and manager of Univision's Western Division to become roving corporate consultant to all Univision's stations, grins and says, "Today that sounds outdated."

But carrying a similar thought—"We are one of you and a real part of the USA," Villanueva says he thinks that after the 1990 census, "and people find out how many there are of us, the '90s have the potential to be the Decade of the Hispanic in this country. We'll have the opportunity to compete for the better jobs on an equal basis. We'll have the opportunity to become equal partners, as opposed to being just house guests.

"At the same time, Los Angeles will be a City of the World, and Hispanics are the single largest ethnic group in this great city. But there's a catch. Our being a real part of all this will happen only if our people are educated to meet the challenge of all this opportunity. If we're not educated, we'll still be qualified only for the second class jobs."

Wider horizons

All this, explains Villanueva, "is why after 25 years running Univision's most important station, I had a strong feeling I wanted to untether myself from KMAX so I can concentrate on doing more nationwide. I want to be in a position to help all our stations [as corporate consultant], serving at the pleasure of Bill Grimes [Univision president], going to wherever I can be of most help at any given moment."

At the same time, he adds, his new job will enable him to "work most effectively to develop a strong respect for education among our young people, and for what education can do for them if they stay with it. We

have to make sure the kids don't drop out. We want to hit this hardest in August. That's after they've been out of school, earning a little extra income for a couple of months, and it's time for the tough decision of whether they and their family can sacrifice that income now, as an investment in much greater long-term future income if they give up their new summer job and go back to school."

Villanueva notes, "We've skirted the edge of these issues for some time at KMAX. We've been running PSAs featuring our outstanding graduates. They go on camera to talk about the value of staying in school, to thank their parents and teachers and their role model, and tell all the kids watching where they're going to college."

And he stresses, "We also have to work with their parents. We have to urge the parents to get involved in their kids' schools, work with their teachers, find out what they're being taught and what they can do to help."

Deeper in politics

Villanueva adds, "Besides education, there's politics. As a station general manager, I always had this feeling I was obligated to stay above the fray—that I should try to remain impartial, more like our news people, just dealing in the facts and not taking sides. Now that I can let Emilio [Nicolas, transferring from general manager at WXTV(TV) New York] and his young team run KMAX, I can let him try to act neutral and I'll have the flexibility to get down in the politics. Hopefully, I'll be in a better position to do some good things for my city and for California as well as being of more help to all our Univision stations. I'll be acting as Univision liaison to the various national Hispanic organizations and I'll be Univision's representative working with the National Hispanic Caucus (made up of the Hispanic members of Congress in Washington)."

He points out that with next year's census, 1990 "becomes a pivotal year for U.S. Hispanics. Congressional Districts will be redrawn. So will local supervisory districts. In spite of our overwhelming numbers here in Los Angeles, even in the 1980 census, an Hispanic county supervisor has never been elected for Los Angeles County."

But in spite of his own plans for all the good things he "hopes to accomplish" now that he's free to get closer to the political action, Villanueva has already racked up an impressive array of accomplishments. He was born in Tucumcari, N.M., the ninth of 12 children of Pilar and Primitive Villanueva. After graduation from New Mexico State University and graduate studies in counseling and guidance, he played football with the Los Angeles Rams and Dallas Cowboys.

He joined KMAX-TV in 1963 as sports director and by 1968 was the station's news director and director of community relations. The next year he moved up to station manager, and two years after that was named vice president and general manager. By the time the station was sold to Hallmark Cards Inc. in 1987, Villanueva was president of KMAX-TV and a director of Spanish International Communications, as Univision was previously known.

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icy to Fowler's. "The FCC has a regulatory approach to all telecommunications issues," she responded. "NTIA is fulfilling a mandate as the president's advisor and executive-branch spokesperson on telecommunications policy issues."

Acknowledging that despite seven years at the FCC, "I have limited background in the mass media area," she shared Fowler's "dedication to advocate liberalization of international telecommunications policies and openness of international telecommunications mar-

kets."

She is married to Bert Halprin, who served as Common Carrier chief under Fowler and is a member of a Washington, D.C., law firm that now bears a burden of notifying NTIA's chief counsel of any action it is about to take involving the federal government, if the NTIA is likely to have an interest in it. At that time, Obuchowski is to "be insulated from such matters."

And she is required by law from discussing "inside information" as pillow talk.

U.S. Senate aims for broadcast role in drug problem

What began as an effort to curb the amount of violence on television ended up in the U.S. Senate a bit broader, with the industry being called on to do what it can to alleviate the nation's drug problem and to reduce the amount of sexually explicit material in telecasts.

The violence part was passed by the Senate during the past two

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Fine-tuning of must-carry dangles as Dingle pushes for agreement

The skids were greased. Kept apprised of the months-long negotiations between the cable and broadcasting industries regarding the latest reincarnation of the must-carry issue, Rep. John Dingell (D-Mich.) said he was ready to take immediate action to get the industry agreement into law.

Dingell, chairman of the House Energy and Commerce Committee, let the negotiating parties know that he was prepared to attach their must-carry agreement to must-pass budget legislation. All they had to do was get an agreement to him.

The weekend following Independence Day, the industries thought they finally had fashioned one. The big stumbling block in the negotiations all year had been a requirement that over-the-air channels not only should be carried on cable channels, but that their cable number be the same as their over-the-air number.

Issues resolved. Earlier the parties had resolved some other thorny issues, cable agreeing to change the must-carry exemption embodied in previous agreements from systems with fewer than 20 channels to systems with fewer than 12 channels, and to agree to hook converters up to second sets in wired homes as part of any federal law requiring cable carriage of over-the-air signals.

The National Cable Television Association and the Community Antenna Television Association balked at that idea for a long time, but Dingell's dangling prospect apparently encouraged them to move, and they gave in. Almost.

The cable negotiators, led by NCTA president James Mooney, would not guarantee UHF independents a VHF slot on cable systems. The National Association of Broadcasters, under the leadership of President and CEO Eddie Fritts, felt it could accept a must-carry agreement without that fine point, but the Independent Television

Association, led by President Preston Padden, balked. Padden knew his membership badly wanted the VHF positioning.

Fritts contacted NAB television board members and reports there was "no dissent" on accepting the negotiated agreement without the VHF guarantee.

Armed with that support, he and his general counsel, Jeff Baumann, journeyed to Padden's house on a Saturday to see if there was some way to move INTV. Padden said he would present the agreement to his board, but his board rejected it.

Lonely INTV. With time lapsing on Dingell's chances to attach the must-carry agreement to the budget legislation he had selected, Fritts and Mooney had not been able to get together to see what ac-

NCTA's Mooney says indies have again passed up their chance to limit their demands to the reasonable.

tion to take next. Fritts would not rule out the possibility that the NAB might push ahead in favor of the agreement by itself and leave INTV to lobby, alone, against it.

As Fritts told his TV board members in a memo, "One window of opportunity has gone by, but there will be others that present themselves in the coming months."

Mooney issued a statement calling the issue one of getting channel 33 carried on channel 5. "We don't think the indies can defend their position in an objective forum; again, we regret they've passed up an opportunity to limit their demands to what they can reasonably claim."

Inouye sees no stumbling block with three commissioners' approvals

He's not sure he can get them confirmed before the August recess beginning on the 5th, but Sen. Daniel Inouye (D-Hawaii), chairman of the Senate Communications Subcommittee, sees no stumbling block to the nominations of Al Sikes to be FCC chairman, and Sherrie Marshall and Andrew Barrett to be commissioners. He knows of "nothing negative" about the candidates, he says.

By the time the Bush administration got around to naming the new FCC majority—and then requiring Sikes to cool his heels for nearly two weeks—the subcommittee already had scheduled a July full of hearings, beginning with one on controversial children's television legislation.

What could be. If the panel could act as quickly on the three FCC nominees as it did on the nomination of Janice Obuchowski to head the National Telecommunications and Information Administration,

the new FCC could be seated now.

The subcommittee took less than half an hour to complete a hearing on her nomination. Although she was a protege of Mark Fowler, former controversial FCC chairman, Obuchowski encountered no resistance from the panel. It even took the unusual step of allowing FCC Commissioner James Quello to endorse her nomination from his place as a member of the audience in the hearing room.

Obuchowski promised the NTIA will continue to focus on high-definition television and the future role of public broadcasting. She also said the NTIA would "ensure that our broadcast, cable television, and program production policies" reflect the fact that "global markets are developing in the mass media area."

But one written question from the subcommittee could have been a trap. She adroitly sidestepped it. It asked her to compare her approach to telecommunications pol-

Washington Report

Less confrontational Markey anticipated in Bush administration

At least one letter-writer on Capitol Hill expects to cut back on his production once the new nominees to the Federal Communications Commission are confirmed by the Senate, possibly before Congress heads into its month-long recess Aug. 5. Rep. Ed Markey (D-Mass.), chairman of the House Telecommunications Subcommittee is declaring a new era in FCC/congressional relations.

"I'm hoping we don't have to send down as many letters," Markey said recently in an interview with TV/RADIO AGE about the new FCC he will be dealing with. "I think, generally speaking, we're at the end of a Reagan era and we're in a Bush era. I think it's going to be much less confrontational, much less ideological."

During the Reagan era, when Mark Fowler and Dennis Patrick presided over the FCC, there was a perceptible change in how the U.S. Congress dealt with the independent agencies of the federal government. Anti-Reagan, Congress established federal agencies to do the nitty-gritty regulation work that normally would be a task of Congress.

When Congress returned to total Democratic control, the votes still were not there to override a Reagan veto, Congress was preoccupied with budget and other considerations, and little legislation could be passed that pleased the Democratic majority. And there remained a reluctance to legislate in areas where more flexible regulation was preferred.

Democrats still headed the committees, so legislation by letter became the accepted means of rule. The chairmen of the two parent Commerce committees in each house and the chairmen of their communications subcommittees did by letter what they could not or did not want to do by legislation. Although in theory, those letters had no more effect on the commissioners than any other filing before that body on a notice of inquiry or a notice of proposed rulemaking, the reality was that letters from the congressional chairmen carried much more weight.

Markey, for one, hopes that period is now ending, although he does not acknowledge that Congress has ruled through letters. "Whoever happens to be over at the FCC, regardless of party, should expect an ongoing correspondence from the Hill with regard to the activities they are engaged in, especially when they're ambiguous in terms of what the activity may be."

He adds, "We have to constantly remind them that we are the ones that ensure that they are accountable to the American public." But he doesn't like to be accused of micromanaging the agency from Capitol Hill. That is a pejorative term used by government bureaucrats who resent congressional interference, he says, without sympathy.

Of Al Sikes, head of the National Telecommunica-



In an interview with TV/RADIO AGE, House Telecommunications Subcommittee Chairman Ed Markey (D-Mass.) anticipates relationships with the new FCC.

tions and Information Administration at the Commerce Department, and nominee to be the new FCC chairman, Markey says, "I respect him, and I think he has the capacity to be a fine chairman."

The appointment of Sikes, Sherrie Marshall, and Andrew Barrett to serve on the commission with Sikes brings reason for cheer, Markey adds. The Bush appointees at the FCC "give some reason to believe that we might be able to find negotiated resolution of some very tough questions."

Markey's tough questions

Markey suggests he will have some tough questions for the new commissioners, too. He expects to pose many of them at an oversight hearing with the new five-member commission early this fall. With only three commissioners serving the FCC since resignations last year that went unfilled due to rancor between Congress and the White House, and the prospect of the chairman being replaced, Markey feels federal communications policy has been hamstrung.

Although Congress as a body may have known in the past year in which direction it wanted to move, "you wouldn't want to give a lot of discretion to an agency which was purely right-wing ideological. You would want one that was more moderate and respectful of congressional intent in terms of how these policies should be clearly implemented." An agency like that, he adds, "would clearly get a lot more latitude in terms of how legislation might be crafted."

Markey leans back and says, "So we'll see. We'll see if Al Sikes is confirmed, we'll see who these other commissioners are, and we'll see where the balance of power is in terms of three votes to two on the broad range of issues that they're going to have to deal with." Although commissions will change in time, he says, Congress does tend to be more generous with an agency that it considers to be more closely in step with the philosophy of Congress.

"You don't have any long-term guarantee that anything given to this new FCC will remain in place because you can always replace commissioners. But at least you have some time span that you feel fairly confident will be predictable. I would much prefer to work in that environment than the one we have had to work in since the beginning of this year."

The situation is like a tennis game, he says. Up to now, Congress lobbed the ball over the net and nothing came back. Now someone is on the other side with a racquet—**Howard Fields**

Congresses and was introduced at the beginning of this one by Sen. Paul Simon (D-Ill.). The television industry, whose own code of conduct was struck down because of antitrust laws, would be given an exemption this time so its leaders can meet and come up with guidelines to reduce the amount of violence shown.

By the time the measure was passed by unanimous vote of the 91 senators who voted, the industry's exemption was expanded to allow it to "alleviate the negative impact

of illegal drug use in telecast material" and "alleviate the negative impact of sexually explicit material in telecast material."

The Judiciary Committee that approved Simon's measure decided to add the drug portion as part of the antidrug fever sweeping the federal government. The sex amendment was added by Sen. Jesse Helms (R-N.C.), who quoted one woman as saying, "I don't want my eight-year-old girl to think that the only way for her to impress men is for her to take off her clothes."

The exemption will last for three years following enactment of the legislation, which now goes to the House of Representatives, which failed to act on the previous Senate bills. If the House makes changes, the differences will have to be reconciled, delaying final passage probably until this fall.

Simon accused the industry of blocking movement of the legislation in the House. The industry position is that the incidences shown on television do not have a negative impact on children.

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—Karl Hagnauer, KPLR

Our experience at WGN-TV with Cycle-Sat has been quite positive. The system has been very reliable and the convenience of receiving the commercials in non-primetime has been helpful in scheduling our tape machines. Our equipment has been freed for production use during the prime hours.

—Robert Strutzel, WGN-TV

The quality and reliability of the hardware and software is outstanding. It's error free in its operation, and the speed with which we receive commercial feeds saves us make-goods and lost time.

—Jim Martin, WOAY-TV

If you still haven't joined the Cycle Sat network, check out the reception we're getting from people who have. Visit us at N.A.B. Booth 3184 and we'll tell you more. Or just give us a call at 1-800-622-1865.

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