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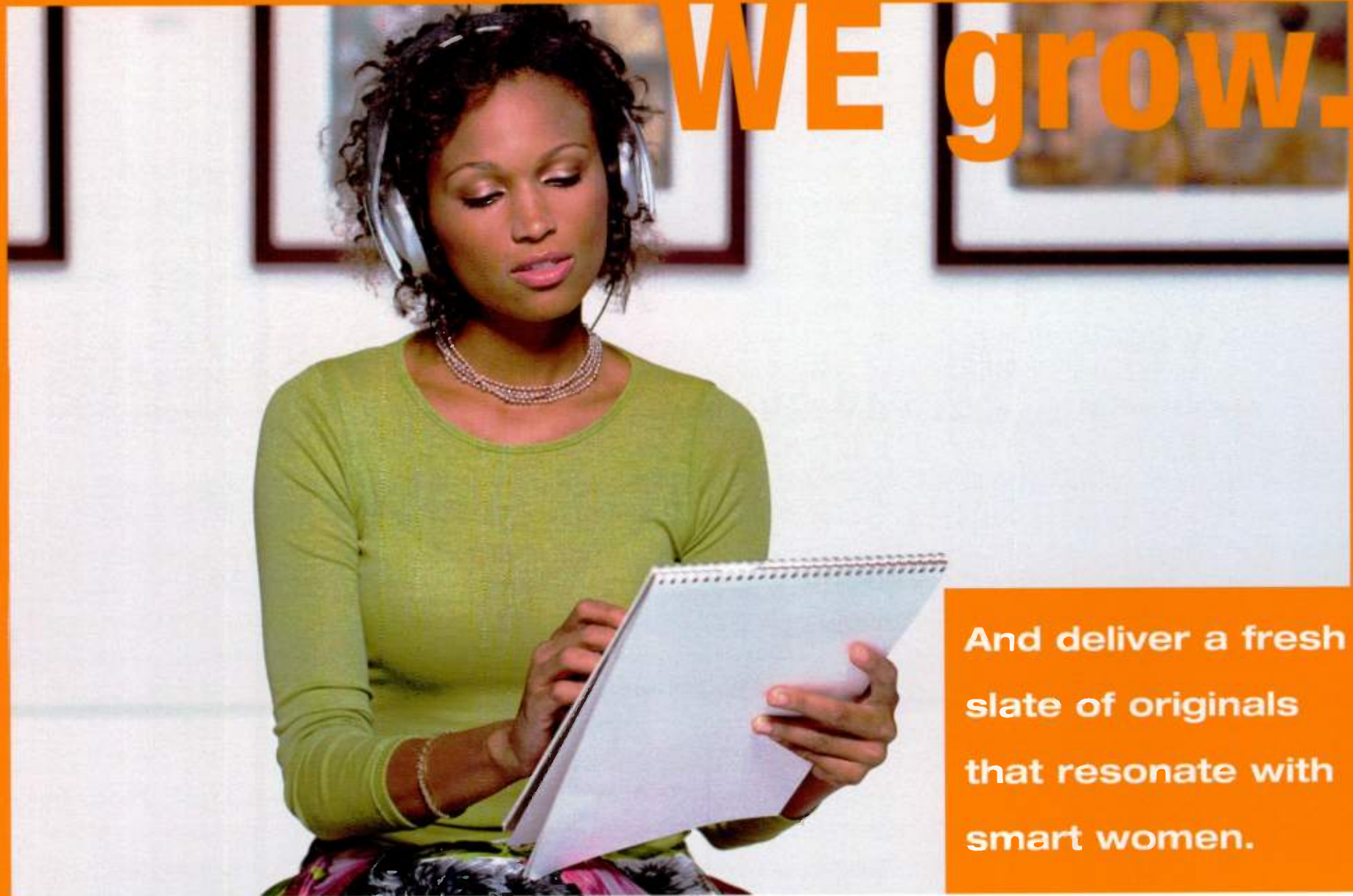
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Ad Infinitum
ON THE HORIZON
PAGE 16

CBS Sweeps Up

For the first time in 24 years, CBS wins the 18-49 crown in the November sweeps—*CSI* and *Two and a Half Men* (below) soar. NBC's *Law & Order* fades, while ABC sizzles with *Desperate Housewives*.
Page 14



“Anything can happen. We may bring in the cast of *Friends* to do the evening news.”

—CBS CHAIRMAN LES MOONVES
ON DAN RATHER'S REPLACEMENT

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Cinematographer Dave Conover shoots Shadow Mountain at the Teton National Forest for Discovery HD.

INSIDE

Roush: On TV Blood Lust **54**

TiVo's Woes **12**

'Seinfeld' vs. Ken Jennings **8**

L.A. CONFIDENTIAL



Shifting Realities

Reality TV has writers, actors and unions singing the blues. But business is booming for travel scouts, hotels, restaurants, rental companies and production facilities. Find out why. **Page 18**

Watch for 50 Million HDTV Sets by 2007

As the price falls, the picture gets clearer

By Ken Kerschbaumer

The tipping point for HDTV is at hand. This Christmas selling season, shoppers will see a funny thing as they stream past store windows: the falling price of HDTV sets. With a superior picture compared with thin-screen plasma TVs, retailers say HDTV sets will soon be affordable to families. As viewers sign on, networks are responding with more HDTV programming, such as Discovery HD's *Sunrise Earth*, an hourly ode to nature's magnificence. In a year, as many as 70 networks are expected to be shooting in high-definition. What's ahead? *See page 22*

SPECIAL REPORT

- Is your HDTV really HDTV? **26**
- Watch, Man: Digital TV on your cellphone **23**
- Tips for Holiday Shoppers **26**
- Pssst! Get a deal on HDTV **24**

DOUGH!

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Harrisburg
Oklahoma City
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Jacksonville
Austin, TX
Green Bay
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Get Real,
Get Smart,
Get Going...

B&C WEEK

**Where to be and what to watch...
Monday, Dec. 6**

Time for **Clash of the Investment Bank Titans: Media Edition!** For the next four days in New York City, UBS and Credit Suisse First Boston will be running competing conferences for media investors—creating the entertaining spectacle of hundreds of money managers ping-ponging between the Plaza Hotel (CSFB's turf) and the Grand Hyatt New York (UBS), hoping to assess the state of play for 70-odd media outfits. The media folks will be shutting, too, when cable operators parade down CSFB's runway on Tuesday, then regroup for UBS two days later. Don't-miss events: **Dick Parsons' Time Warner** update at today's UBS lunch and **Disney President and COO Bob Iger's** doubleheader on Wednesday (CSFB lunch, UBS end-of-day). Watch as investors climb all over each other trying to get a peek inside the roiling House of Mouse.



Dick Parsons

Tuesday, Dec. 7
The Cable Television Public Affairs Association, along with the Graduate School of Political Management at George Washington University, is hosting a three-day program in Washington, D.C., to teach cable TV public affairs professionals how to be, well, more professional (tuition: \$3000, including room and board). Day Two is today, when "learning objectives" include "practical exercise in standing in front of the camera—sound bites and message delivery." On NBC tonight, the network savors a rare ratings bright spot with **Law & Order: Special Victims Unit**—and counts down the days until the show becomes a special victim of Fox's *American Idol* revival next month.



Bob Iger

SVU's Mariska Hargitay

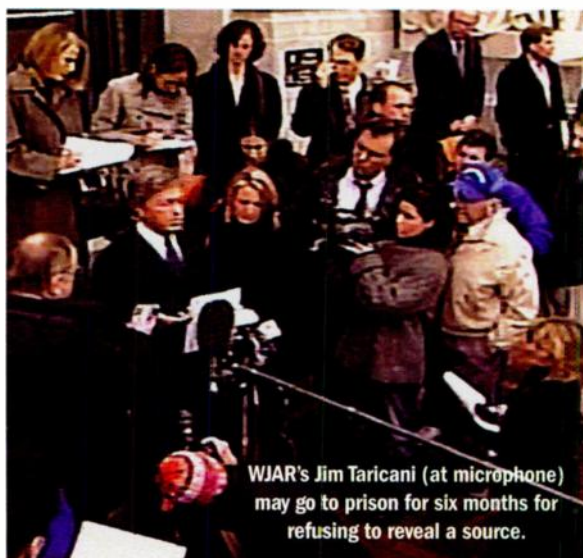


SVU's Mariska Hargitay

Photo: Filmmagic.com (counterclockwise from top left excluding Moonves and Hargitay) Stephen Lovekin, Jason Merritt, Robin Platzer, Bill Davila

Truth Seeker's Trials

By J. Max Robins



WJAR's Jim Taricani (at microphone) may go to prison for six months for refusing to reveal a source.

On Dec. 9, Emmy Award-winning investigative reporter Jim Taricani may go to jail for doing his job. Nearly four years ago, toiling for NBC-owned WJAR Providence, R.I., Taricani scored big: He got his hands on a videotape of a top aide of the city's then-mayor, Vincent A. Cianci Jr., taking a bribe from an FBI informant.

U.S. District Chief Judge Ernest C. Torres, incensed by the leak, appointed a special prosecutor, Mark Desisto, and began trying to compel the reporter to reveal his source, escalating the pressure from \$85,000 in fines to threatening him with criminal contempt. Taricani now faces up to six months in the slammer—this, for a 55-year-old reporter who had a heart transplant in 1996 and whose current ticker is turbocharged with a pacemaker.

Three hots and a cot may be Taricani's fate, despite a twist in the case that, in a sane world, would guarantee his freedom. Joseph Bevilacqua, a lawyer for one of those convicted in the corruption case, has revealed to prosecutor Desisto that he was the source of the tape. In outing himself, Bevilacqua also claimed he had told Taricani long ago that he was willing to waive confidentiality but Taricani asked him to stay mum. (Bevilacqua had been questioned about the tape earlier in the investigation and had denied leaking it.)

In a statement, Taricani denied Bevilacqua's claim that the reporter had asked for his silence, saying he would have never put his health, reputation, family and company at risk if he had not felt obligated to preserve Bevilacqua's confidentiality.

"I believe Jim," says John DePetro, who covered the case for Providence radio station WHJJ and was also questioned by the prosecutor about the leaked tape. "This thing is killing him."

Now that Torres and Desisto know who gave Taricani the tape—which, after all, was the whole point of this exercise—you'd think the reporter would be off the hook. Guess again. Desisto, apparently believing Bevilacqua's story, told the Associated Press that Taricani's alleged insistence on keeping Bevilacqua's identity secret against his wishes should be taken into consideration when Torres sentences the reporter.

Why is Desisto so doggedly pursuing this case? Hard to say. But radio reporter DePetro notes that Desisto and Taricani have history that may help explain the special prosecutor's point of view. In 1984, when Claus von Bulow's conviction for the attempted murder of his wife, Sunny, was overturned on appeal (the case was depicted by the movie *Reversal of Fortune*), Desisto was the prosecutor who lost to defense attorney Alan Dershowitz. Covering the trial, Taricani had become close to von Bulow and his girlfriend, Andrea Reynolds, and his reporting was seen as sympathetic to the defense. "I was in the courtroom when the von Bulow verdict came down, and Taricani was sitting next to Reynolds patting her hand," says DePetro. "He got the first post-verdict interview with Claus." Prosecutors can have long memories.

THE ROBINS REPORT

So should we. If confidential sources can't expect to stay confidential and if reporters risk going to jail for seeking out the truth, then we're all headed for serious trouble. Fourteen states have shield laws that protect reporters from prosecution, but no such federal protections exist.

Sen. Christopher Dodd (D-Conn.) has submitted a bill for a federal shield law, but it's given little chance of passage. "You're talking about a five- or six-year fight at least," says Lucy Dalglish, executive director of the Reporters Committee for Freedom of the Press. "I was meeting with some veteran First Amendment lawyers, and they were lamenting they didn't go for a federal law back in the 1970's post-Watergate era." In those days, Dalglish says, "it was more understood why this kind of press protection is so necessary." ■

Wednesday, Dec. 8

The Hollywood Radio and Television Society's Newsmaker Luncheon today: "Reality Television." For \$120 (members \$85), you'll get to hear producers (Allison Grodner, Michael Davies) and ad execs (Jon Mandel, David Goldberg) gassing about reality TV, but we'd happily scoot over to the Regent Beverly Wilshire Hotel in Los Angeles just to see special guest **Chuck Barris**. We remain in awe of his *Gong Show*-worthy talent for balancing a reputation both as what the HRTS calls a "Reality Pioneer" and as a barely-tethered-to-reality guy who coyly suggests he was once a CIA hit man. In New York, NBC's affable chairman **Bob Wright** throws his annual holiday cocktail party for journo who cover the TV industry. NBC brass and even a few news luminaries circulate in the executive dining room perched high above **Rockefeller Center**. The booze flows freely and gossip flies, but, sadly, it's all supposedly off the record.



Chuck Barris

Thursday, Dec. 9
Shades of the whole UBS/Credit Suisse scheduling smackdown! CBS Chairman **Les Moonves** says, "Right back at ya, Bob," and throws his own fete for the Fourth Estate. CBS' invitation list is less picky, er, more democratic, so no wonder the finger food tends more toward pigs-in-blankets than sushi, washed down with Absolut, not Belvedere.



Les Moonves

Friday, Dec. 10

Tonight, **Brian Williams** finishes his first full week in the *NBC Nightly News* anchor chair and ponders **Tom Brokaw's** legacy. No, not his contributions to journalism; his lead in the ratings, which NBC execs will be nervously monitoring for signs of erosion.—Mark Lasswell



Brian Williams

E-mail info for B&C Week to b&cweek@reedbusiness.com

FAST TRACK

Court To Rule On Cable Internet

The U.S. Supreme Court said Friday it will decide one of the most controversial debates in the growing business of high-speed Internet service: whether cable operators must carry competing service providers over their broadband networks. Cable operators, Internet service providers and consumers activists have waged a bitter fight over the issue for six years. Cable systems have fought to block competing providers from their high-speed Internet lines, which can be used to deliver video, telephone and other digital services that compete with cable. The court's decision is based on the FCC's appeal of an October 2003 lower-court decision.

Williams, Brokaw Score in Ratings

New *NBC Nightly News* anchor **Brian Williams** is already on top. Williams, who inherited the anchor chair from **Tom Brokaw** Dec. 2, beat out rivals **Peter Jennings** and **Dan Rather** in his debut *NBC* evening newscast. *Nightly News* recorded 11.68 million viewers, beating out *ABC's World News Tonight*, which counted 9.3 million viewers, and *CBS Evening News*, with 7.5 million viewers. In the key 25-54 demo, Williams attracted a 3.3 rating, and he beat *Nightly News'* November average of 11.15 million viewers. It wasn't quite the audience that tuned in for Brokaw's Dec. 1 farewell: 15.4 million viewers, the show's largest audience since January 1997.

Hartenstein To Leave DirecTV



Eddy Hartenstein

The executive who forged **DirecTV** into the powerhouse it is today is leaving the company. **Eddy Hartenstein** has been vice chairman of **DirecTV**

Group since **News Corp.** bought control of **DirecTV** owner **Hughes Electronics** a year ago. Hartens-

T A B L E O F C O N T E N T S

DECEMBER 6, 2004 VOLUME 134 NUMBER 49



Las Vegas in High-Definition: Shooting *CSI* Page 22

COVER STORY

HDTV Future Is Wide Open **Page 22**
It's Not Really High-Def **Page 26**

FEATURES

Winners and Losers in Reality Production **Page 18**

DEPARTMENTS

B&C Week **Page 5**
The Robins Report **Page 5**
Flash **Page 8**
Washington Watch **Page 10**
Money Talks **Page 12**
Station to Station November Sweeps **Page 14**

SYNDICATION

Ratings *NBC's 2006 Fallout* *In Focus* **Page 13**

MARKET EYE

Raleigh-Durham: At a Glance *Southern Comfort* *Demos* **Page 15**

ADVERTISING

Horizon Media Ready To Take on the Big Boys **Page 16**

SPECIAL REPORT: FOUNDATIONS OF SYNDICATION PART 1

Viewers Know What They Like, Repeatedly **Page 29**
Talk Gets Younger, Richer Crowd **Page 30**

TECHNOLOGY

Big Apple DTV Transmission *Q&A: Chris Cookson, Warner Bros.* **Page 40**

PEOPLE

Fifth Estater: Bill Shine, Fox News *Fates & Fortunes* **Page 42**

DEALS

Page 46

NIelsen RATINGS

Page 48

OPINION

Editorial *Airtime* *Open Mike* **Page 53**
Matt Roush **Page 54**

tein, 54, was the first president of the El Segundo, Calif.-based DBS operation when Hughes created it in 1990.

USA and Bravo Capture 'L&O: CI'

As expected, **NBC Universal** opted to keep the cable syndication deal for *Law & Order: Criminal Intent* inside its own corporate family, but it wasn't exactly a sweetheart deal. The media giant's **USA Network** and **Bravo** are paying top dollar for off-net rights to the third *Law & Order*, produced by **Dick Wolf's** **Wolf Films** and **NBC Universal**



Law & Order: CI

Television Studio. The cable networks will pay about \$2 million per episode for the crime drama, making it one of cable's richest syndication

deals ever. Starting in late 2005, **USA** will run *Law & Order: CI* on weekdays, and **Bravo** will get weekend plays.

Viacom To Acquire Sinclair's KOVR

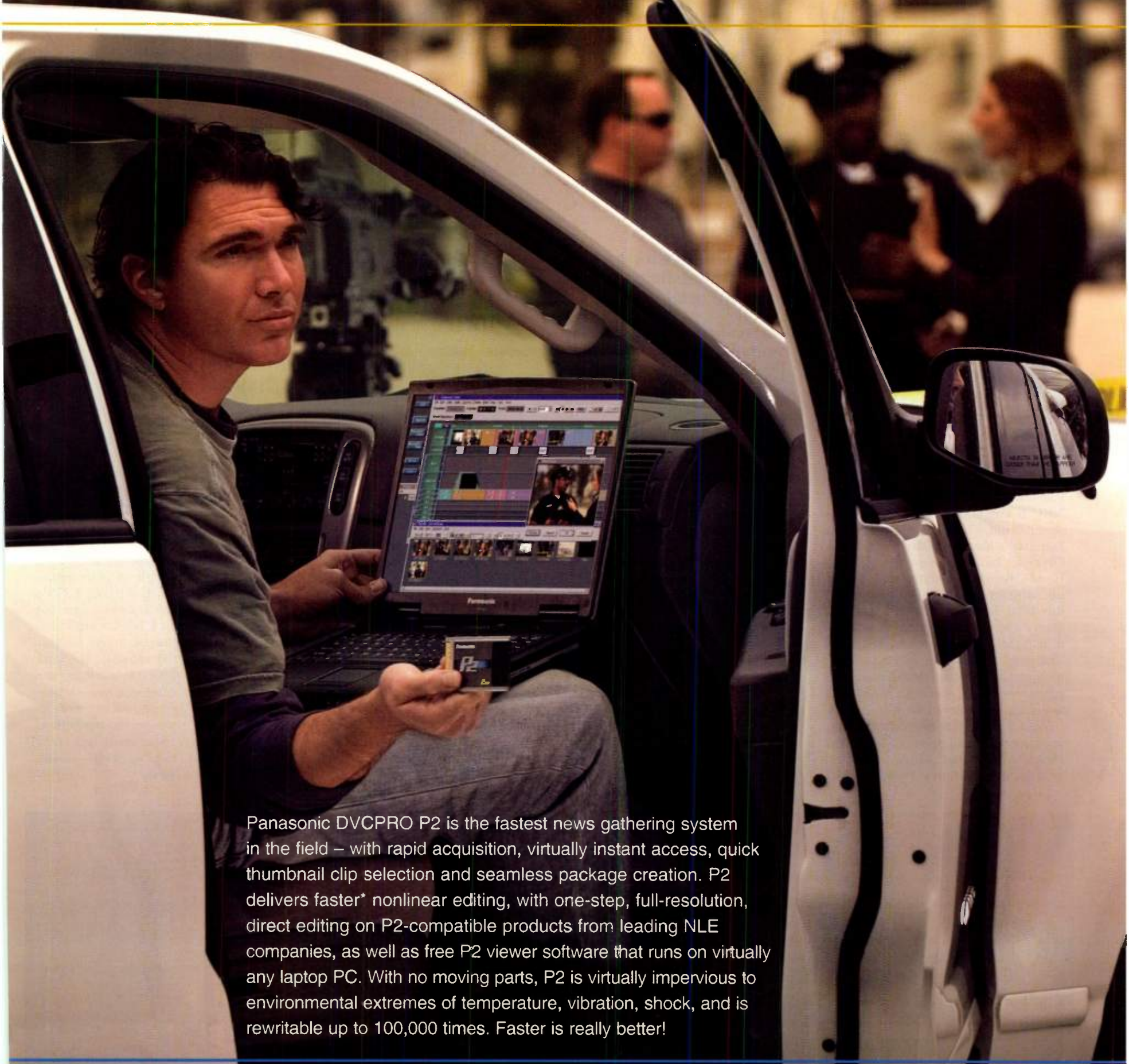
Viacom plans to buy **KOVR** Sacramento, Calif., from **Sinclair Broadcast Group** for \$285 million in cash, the two companies announced Dec. 2. The deal allows **Viacom** to bring one more affiliate of its **CBS** broadcast network into its stable of O&Os. If approved by the **FCC** and the **Justice Department**, the deal also would create the company's ninth duopoly. **Viacom** already owns **UPN** affiliate **KMAX** Sacramento, a UHF station.

Univision Withdraws Nielsen Lawsuit

Spanish-language broadcaster **Univision** has withdrawn its lawsuit against **Nielsen Media Research** over the research company's new system for measuring local TV ratings. As part of **Univision's** withdrawal, **Nielsen** has withdrawn its own motion against the broadcaster. **Univision** had sued to block **Nielsen** from deploying local people meters (LPMs) in Los Angeles, but the rollout proceeded as planned in July.

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World Radio History

'Today' Gets a Dose of 'Maury'



Maury maven Amy Rosenblum tweaks *Today*

Faced with prime time fires to put out, NBC is jumping into action to make sure mornings don't turn into a problem, too. Although *Today* enjoyed an Olympics bump this summer, ABC's *Good Morning America* has made up substantial ratings ground from this time a year ago: *GMA* has cut *Today*'s lead in total viewers almost in half, from 1.3 million to 570,000. That may help explain why NBC has recruited **Amy Rosenblum**, executive producer of NBC Universal's *Maury*, to consult on *Today* as well.

With Rosenblum tweaking *Today*, it's tempting to imagine **Katie Couric** and **Matt Lauer** adopting the scabrous style of **Maury Povich**'s talk

show (Coming this Friday: "I slept with 2 boys at 14... who's the father?"), but Rosenblum shouldn't be confused with a bottom-feeding tabloid producer. She's a former booker for *CBS Evening News*, where she developed a reputation as an indefatigable story-

Don't confuse Rosenblum with a bottom-feeding tabloid producer.

hound. Though she has sharp elbows, Rosenblum is also charming enough to have become pals with Miss Silky herself, **Diane Sawyer**, when both were at CBS. Now the two women are on opposite sides as Sawyer and *Good Morning America* draw a bead on *Today*'s lead.

Memo to Ken Jennings: Watch More 'Seinfeld'



Ken Jennings

It was a masterstroke in the marketing of the new *Seinfeld* DVDs. The boxed set of the first three *Seinfeld* seasons was launched in November by Co-

lumbia TriStar Home Entertainment—as opposed to Columbia TriStar Television, the company that produces *Jeopardy!*, which was enjoying banner ratings thanks to **Ken Jennings**' astonishing run of victories. Why not piggyback on the game show with a major plug for the *Seinfeld* DVDs? Use *Seinfeld* catchphrases for categories, create a *Seinfeld* category featuring *Seinfeld* stars on videotape giving *Seinfeldian* clues. Even get **Alex Trebek** to mention the DVD release. Brilliant! When the *Jeopardy!* installment that Columbia TriStar chose for the stunt turned out to be the very one that saw Jennings finally lose—even better! That episode garnered the show's best numbers in almost eight years, according to preliminary numbers, pulling in an estimated 18 million viewers.

But some *Jeopardy!* fans were left wondering: Did Columbia TriStar's big push for *Seinfeld* have the unintentional effect of helping kill the contestant who laid the golden ratings egg? During his winning streak, Jennings made a practice of starting fast, building an insurmountable lead and then coasting through Final *Jeopardy*. On this night, though, he wobbled right from the beginning. Five of the first six clues came from the *Seinfeld* trivia category, and Jennings managed to answer only one correctly, for \$400. He stumbled through the first round (nailing

only two of five questions in the "No Soup for You" category), and, when Final *Jeopardy* rolled around, he was in the unaccustomed position of being vulnerable to the competition.

Bakhtiar Bumped

David Letterman's darling is heading for the exits at CNN *Headline News*, and it's not quite voluntary.



Rudi Bakhtiar

Rudi Bakhtiar—who was a regular topic of the late-night comic's monologue a couple of years ago—has been anchoring the baby CNN's evening program for two years but isn't cutting it as CNN Group President **Jim Walton** plans yet another retooling of the channel. Bakhtiar (who didn't respond to our interview request) was offered a slot anchoring another daypart, but her contract says prime time, so the network is releasing her. She spent last week job hunting, meeting with—among others—Fox News.

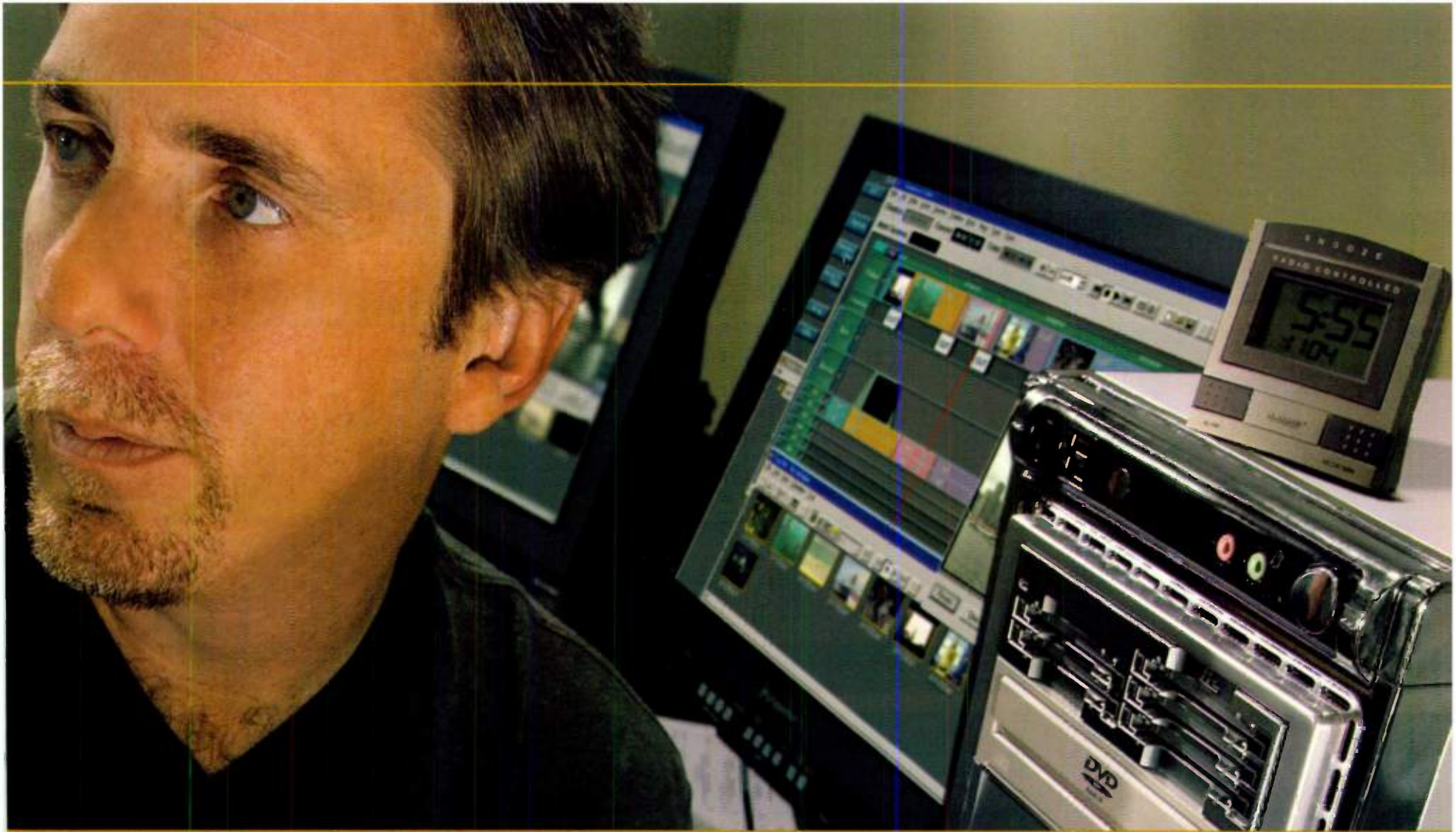
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World Radio History

Fox's *Keen Eddie* escaped a fine for an episode involving a horse.



When Is a Dirty Show Indecent?

The FCC's answers are increasingly confusing **By Bill McConnell**

FCC commissioners gave some Fox, WB and NBC stations a reason to be truly grateful Thanksgiving week by dismissing indecency complaints against gross-out episodes of Fox's *Keen Eddie* and The WB's *Off Centre*, as well as the sex-obsessed NBC flop *Coupling*.

The Fox program implied that the *Keen Eddie* cast hired a prostitute to masturbate a horse, and the *Off Centre* episode dwelled on backed-up toilets and a patient's embarrassment as his urologist discussed his sexual dysfunction in an elevator.

The *Coupling* episode was a "close case" because it featured "sustained and repeated use of sexual innuendo and double entendre." Although the sex talk was enough to render the program "shocking and titillating," the lack of graphic depiction or description of sex—beyond kissing—so the FCC decided no punishment was necessary.

FCC's Not All-Forgetting

The dismissals spared the owners an estimated million dollars or so in fines. The rest of the broadcast industry, however, shouldn't assume the FCC is in a forgiving mood. The indecency

crackdown launched by Janet Jackson's Super Bowl striptease continues in full force, and these latest rulings only make it harder for station owners to predict when edgy programming is likely to get them in trouble.

"The more the FCC tries to explain its unclear indecency policies, the less clear they become," complains John First Amendment attorney John Crigler, of Washington firm Garvey Schubert Barer.

Broadcasters might find it impossible to sort out how the FCC decides when a program has crossed any of the three hurdles that must be crossed before a fine is levied, he says. To be hit with a fine, a program must first be found to shock, titillate or pander to the audience. Second, it must be graphic in its depiction of sexual or excretory activities, and finally, it must be found to violate community standards.

The *Keen Eddie* case is one example of conflicted reasoning, Crigler says. The FCC dismissed the case because the cast simply hired a prostitute to "extract" semen from a horse and never explicitly told her how to obtain it; masturbation is never mentioned, and she never touches the horse.

However, when she balks, saying the whole exercise is "not natural," one cast member calls her "a 40-year-old filthy slut" who will "do anything." The FCC acknowledges in its order that the implications of the conversation might upset some viewers but says the scene "does not appear to have been intended to shock, titillate or pander."

That easy-going reaction contrasts with the FCC's earlier decision to fine KRON(TV) San Francisco for a newscast covering "Puppetry of the Penis,"

a group of performers who appear clad only in capes. One cast member's penis appeared on-camera—accidentally, the station insists. Even though the puppeteers were covered in a news program, the FCC judged that the station intent was to shock, etc.

"It's hard to know what to read into any particular FCC decision," Crigler laments.

Official's Complaint

It's not just industry defenders like Crigler who complain that the FCC is indecency enforcement is inconsistent.

Democratic FCC Commissioner Michael Copps—the agency's most ardent indecency foe—complains that last week's decisions make it easier for TV stations to get away with programming that would likely generate fines for radio stations. "We must ensure that we do not impose a different standard for television than for radio," he said in his dissent over the *Off Centre* dismissal.

The FCC didn't sanction scenes depicting the frantic toilet flushers on *Off Centre* because no feces-filled bowl was actually shown on screen. But a similarly crass episode only five months earlier generated a \$27,500 maximum fine for WITH(FM) Washington. The station's *Morning Mess* show was hit for a bit purportedly describing a man working a penis-enlargement device. Listeners were encouraged to call in and guess how much bigger his organ would get.

In each order, the FCC goes to great lengths to justify the decision for or against a fine, and the commission makes clear that there's no hard and fast rule. Context is key. *Keen Eddie* got a pass because the episode appeared to

be focused on the prostitute's reaction to the bizarre request rather than airing an actual lewd act with a horse. Penis puppetry generated a fine because the snickering anchors demonstrated that they intended to pander.

But industry lawyers counter that the FCC's context reviews are wildly unpredictable and sometimes don't occur at all. When NBC stations were fined in March for airing U2's Bono's blurt of the f-word, the FCC order convinced many that any future use of profanity on the air would be judged indecent. FCC Enforcement Bureau Chief David Solomon disputed that



Some ABC stations, fearful of the FCC, declined to air *Saving Private Ryan*.

blanket interpretation in a speech this summer. But his assurances weren't enough to convince all ABC affiliates, and many refused to air *Saving Private Ryan* when their network ran the movie, which features plenty of swearing soldiers, last month.

As appeals of the Bono decision and Viacom's fine in the Janet Jackson case wend their way through the FCC and into court, broadcasters will attack the perceived inconsistency and, they hope, derail the indecency crackdown. ■

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KTVU-TV, Oakland, CA
KXLN-TV, Houston, TX
Tamberelli-Rental, New York, NY

WNYW-TV, New York, NY
WPXI-TV, Pittsburgh, PA
WBNS-TV, Columbus, OH
WDEF-TV, Chattanooga, TN
WEWS-TV, Cleveland, OH
Wexler Rental, Los Angeles, CA
WFLA-TV, Tampa, FL
WFTV-TV, Orlando, FL
WHIO-TV, Dayton, OH
WJBF-TV, Augusta, GA
WLOX-TV, Biloxi, MS
WNYO-TV, Buffalo, NY
WSOC-TV, Charlotte, NC
WTOV-TV, Stuebenville, OH
WTVQ-TV, Lexington, KY
WWOR-TV, Secaucus, NJ

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The End of TiVo as We Know It

How the DVR service won the battle but lost the war with cable and DBS

If you're one of 250,000 or so people expected to buy a standalone TiVo box this holiday season, the purchase is only the first step. The digital video recorder (DVR) needs frequent updates so your electronic program guide knows when to catch that final episode of NBC's *Father of the Pride*. Keeping the guide fresh requires paying either \$12.50 per month or a fat, one-time \$299 fee.

That subscription fee is immensely profitable for TiVo. Delivering the guide data costs the company a mere 94¢ a month.

Any company that can get away with a 1,300% markup on its core product should be a great success. But TiVo is not yet a success, and it's hard to see how it will ever become one.

Despite pioneering an amazing product that is transforming the entire television industry, the company faces dramatic threats to its life. TiVo discounts its hardware so heavily that the company is riddled with losses. Revenues should total \$118 million for fiscal 2005 ending in January, but operating cash flow should run a negative \$87 million. (TiVo has accumulated \$600 million in losses over six years.)

Cable operators—who are years behind their direct-broadcast-satellite (DBS) rivals—are aggressively rolling out millions of DVRs to their customers. But TiVo hasn't been able to sell a single operator on employing its technology in cable set-tops.

Cable operators believe that they don't need the brand and that they can get data and technology at a cheaper rate from their traditional box suppliers, Scientific-Atlanta and Motorola.

Moreover, cable companies want their DVR guides to show not just what's on

MTV or NBC but to integrate their video-on-demand systems.

All this helps explain why TiVo's stock has dropped about 50%, to around \$4.60 per share, this year.

It's a sad plight for the developer of a device so amazing that its name has become a verb. TiVo's technology is expected to be in just a third of the

ly 85% of my TV viewing comes from programs recorded on TiVo, and with all apologies to folks at the networks and ad agencies, I get annoyed when forced to endure all the commercials my TiVo lets me skip.

TiVo has some elements of a great business. As a brand, TiVo has become Kleenex, hugely identified with the whole category of DVRs. TiVo creates a zeal following among its customers equivalent to the cult of Apple. Subscriber growth is huge, having doubled over the past year to 2.3 million.

So what's the problem? Getting new subscribers is enormously expensive. Todd Mitchell, an analyst for Blaylock & Partners, estimates that subscriber acquisitions cost TiVo around \$200 each. TiVo's financial statements show that consumer rebates, subsidies to manufacturers and other marketing costs sucked up about 84% of the company's revenues during the third fiscal quarter ended in October. That's before the company pays any salaries or other operating expenses.

Further, the bulk of TiVo's subscriber growth isn't coming from those lucrative standalone subscribers. It's coming via DirecTV. About 75% of TiVo's 419,000 new customers during the most recent quarter are DirecTV subscribers. The DBS service accounts for around half of TiVo's 2.3 million total subscribers.

DirecTV incorporates TiVo technology and data into its receivers, charging customers an extra \$4.95 a month. But it pays TiVo an average of just \$1.34 per subscriber monthly. Still, TiVo incurs very little cost from each new DirecTV customer, so even the small fee is more than 90% profit.

But TiVo can't count on DirecTV for growth. DirecTV is widely expected to stop pushing TiVo receivers next year, in favor of DVR software being developed by NDS Group. Both companies are controlled by Rupert Murdoch. News Corp. owns 78% of NDS while its subsidiary, Fox Entertainment, owns 34% of DirecTV. It is inevitable that Murdoch will use his control over DirecTV to favor NDS, a trick he may have picked up from his biggest shareholder, Liberty Media Chairman John Malone.

No doubt the deal will be completely fair to the public shareholders of DirecTV and NDS. But it's guaranteed to be no good for shareholders of TiVo. ■

MONEY TALKS By John M. Higgins

6.4 million DVRs in consumers' homes by year's end. "It is unfortunate that TiVo has spent years and years educating the consumer, driving the consumer to 'TiVo' television," says April Horace, an analyst at Denver investment banking firm Janco Partners. But people recording television programming won't necessarily use a TiVo box to do it.

TiVo executives acknowledge that

"It is unfortunate that TiVo has spent years and years educating the consumer, driving the consumer to 'TiVo' television."
APRIL HORACE,
JANCO PARTNERS

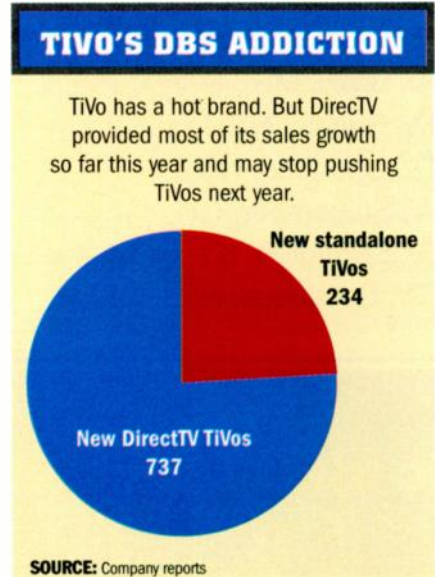
they face dramatic challenges, but they don't see such a dark future. To drive Christmas sales, they're offering rebates to cut the retail price of a standalone TiVo box in half, to \$100. The company has added a number of retailers for the Christmas season, including Costco and Target. Combined with sales of DirecTV receivers, TiVo expects to add 575,000-700,000 subscribers during the season.

In the long run, TiVo contends that innovative technology will carry the day. Chief Marketing Officer Matt Wisk compares TiVo to the iPod. Dozens of manufacturers beat Apple to the MP3 player market, but innovative design and clever software has the company cleaning up.

And the race has just begun, says Wisk. "At 5% penetration, I'd say we're at mile one."

There's room even in the cable challenge. Cable operators are close to opening up the production of set-tops to all kinds of manufacturers. TiVo can then manufacture its own or partner with the likes of Toshiba.

I, too, am a devoted fan of TiVo, and I can't imagine life now without it. Near-



THE B&C

WEEK OF NOV. 26-DEC. 2

THE B&C 10

	WEEK	YTD
	1.0%	-4.4%

BROADCAST TV GROUPS

	WEEK	YTD
	-0.4%	-14.9%

CABLE TV MSOs

	WEEK	YTD
	-1.2%	-5.4%

RADIO

	WEEK	YTD
	-1.4%	-27.3%

	CLOSE	WEEK	YTD
Dow Jones	10585.10	0.6%	1.3%
Nasdaq	2143.57	2.0%	7.0%

THE B&C 10

	CLOSE	WEEK	YTD
Clear Channel	\$34.26	-1.3%	-26.8%
Comcast Corp.	\$29.29	-2.6%	-6.4%
Cox Comm.	\$34.72	0.3%	0.8%
Disney	\$27.62	1.0%	18.4%
EchoStar	\$33.59	0.2%	-1.2%
Fox Ent.	\$30.84	3.7%	5.8%
Hearst-Argyle	\$26.12	0.2%	-5.2%
Time Warner	\$18.23	0.8%	1.3%
Tribune	\$43.46	0.8%	-15.8%
Viacom	\$37.00	2.9%	-16.4%

GOOD WEEK

Sinclair Bcstg.	\$8.41	18.0%	-43.9%
Sirius	\$7.26	16.2%	129.7%
Granite	\$0.44	10.0%	-73.3%
Playboy Ent.	\$11.65	5.9%	-19.6%
SeaChange	\$17.86	5.3%	16.0%

BAD WEEK

Beasley Bcstg.	\$16.67	-5.8%	0.8%
Mediacom	\$5.14	-5.5%	-40.6%
Paxson	\$1.20	-4.8%	-68.8%
TiVo	\$4.94	-4.6%	-33.2%
Salem Comm.	\$24.95	-4.4%	-8.0%

SINCLAIR DEALS

+18%

Investors loved Sinclair Broadcast Group's deal to sell its Sacramento, Calif., CBS affiliate KOVR for \$285 million. Still, last week's 18% rise leaves Sinclair down 44% for the year.

Source: CNET Investor (investor.cnet.com). This information is based on sources believed to be reliable, and while extensive efforts are made to assure its accuracy, no guarantees can be made. CNET Investor assumes no liability for any inaccuracies. For information regarding CNET Investor's customized financial research services, please call 415-344-2836.

RATINGS 11/15-21/04

Nielsen Media Research

Top 25 Shows

HOUSEHOLDS

PROGRAM	AA	GAA
1 Wheel of Fortune	9.1	NA
2 Oprah Winfrey Show	8.1	8.3
3 Everybody Loves Raymond	7.6	9.7
4 Jeopardy!	7.5	NA
5 ESPN/NFL	7.4	NA
6 Seinfeld	6.2	7.7
7 Friends	6.1	7.8
7 Seinfeld (wknd)	6.1	7.5
9 CSI: Crime Scene Investigation	5.8	6.7
10 Entertainment Tonight	5.6	5.7
11 Dr. Phil	5.5	5.5
12 Judge Judy	5.1	7.7
13 Wheel of Fortune (wknd)	4.3	NA
14 Inside Edition	3.7	3.7
15 Who Wants To Be a Millionaire	3.5	3.8
16 Entertainment Tonight (wknd)	3.4	3.5
16 Malcolm in the Middle	3.4	4.0
16 That '70s Show	3.4	4.3
19 Judge Joe Brown	3.3	4.7
19 Will & Grace	3.3	4.1
20 King of the Hill	3.2	3.9
20 Live With Regis and Kelly	3.2	NA
23 Everybody Loves Raymond (wknd)	3.1	3.3
24 Cops	2.9	3.7
24 Maury	2.9	3.1

Top Talk Shows

HOUSEHOLDS

PROGRAM	AA	GAA
1 Oprah Winfrey Show	8.1	8.3
2 Dr. Phil	5.5	5.5
3 Live With Regis and Kelly	3.2	NA
4 Maury	2.9	3.1
5 Mentel Williams Show	2.3	2.4

According to Nielsen Media Research Syndication Service Ranking Report Nov. 15-21, 2004

AA = Average Audience Rating;

GAA = Gross Average Audience

One Nielsen rating point = 1,096,000 households, which represents 1% of the 109.6 million U.S. TV Households

NA = not available

On the Fringe

NBC's top stations face possible shortfall in 2006

By Paige Albinak

NBC's O&O stations in the top three markets need to shore up syndicated fare for fall 2006. That's because the network has relinquished its lucrative early-fringe programming in New York, Los Angeles and Chicago. It's an open question what will replace its current lineup. For now, *The Ellen DeGeneres Show* is a leading contender.

In New York, Paramount's *Judge Judy* is moving from WNBC to WCBS, which reportedly paid some \$250,000 per week for the show in a two-year deal, totalling \$13 million annually.

Paramount won't allow WNBC to run its *Judge Joe Brown*, which the station renewed, against *Judge Judy*. For now, that leaves WNBC without a big-name show to compete against *Judy* and *The Oprah Winfrey Show* at 4 p.m. in the No. 1 market.

In Los Angeles, KNBC let KCBS pick up King World's *Dr. Phil* for approximately \$225,000 per week. KNBC had been paying an estimated \$185,000 for it and refused to fork over the increases demanded by the distributor.

Meanwhile, in Chicago, Viacom's WBBM stole *Phil* away from NBC's WMAQ, which was using it as a lead-in to its early newscast. WBBM paid

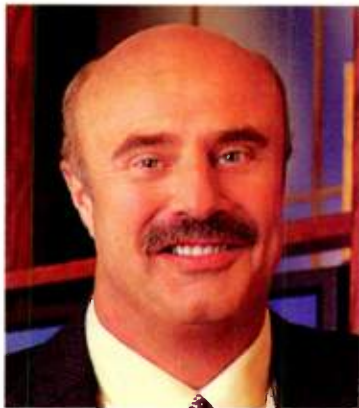
\$140,000 a week for *Phil*, per industry estimates, where WMAQ had been paying \$80,000. WBBM will pair *Phil* with *Judge Judy*, leading into news.

Without powerhouse early-fringe shows, top NBC stations may struggle in 2006. Because the network isn't doing well, it needs to protect its early news, which will be adversely impacted by the loss of its winning lead-in. In two years, observers claim, stations could face financial shortfalls.

But insiders familiar with the situation disagree. They say NBC couldn't make money on the shows at such high prices and decided the lead-in bump wasn't worth the additional cost. NBC could have the biggest ratings numbers in the world, says one executive, "but if it loses a ton of money, it doesn't win."

Although most industry observers don't expect NBC Universal's *The Jane Pauley Show* to become the next big early-fringe vehicle, Warner Bros.' NBC is happy with *Ellen's* performance in its O&O markets; plus, the network is a profit participant.

With *Dr. Phil* moving to 5 and 7 p.m. in many markets, there are no immediate replacements, but *Ellen* could have an easier time at 3 and 4 p.m. without competition from *Phil*. ■



KCBS nabs Dr. Phil in 2006.

IN FOCUS



Amanda Byram, host of UK's ET

'ET' GOES BRITISH

Paramount's *Entertainment Tonight* is launching a British version of the access magazine on Jan. 7, 2005, says Armando Nunez, president of CBS Paramount International Television. The originally produced show will be a one-hour weekly version hosted by *The Swan's* Amanda Byram and members of Paramount's *ET* team. The show, to be shot in Paramount's Hollywood studios, will give British viewers a look at the best celebrity stories of the prior week, with a focus on U.K.-based stars. Jamie Roberts, Sky One's newly appointed head of production and development, will oversee production of the show in conjunction with *ET* executive producer Linda Bell Blue. Sky One, the U.K.'s top entertainment channel, also signed a deal to air the half-hour U.S. strip starting Jan. 3.

'ELLEN' SALUTES U.S. TROOPS

Warner Bros.' *The Ellen DeGeneres Show* landed its highest numbers of the November sweeps with a Nov. 24 show that honored U.S. troops. *Ellen* also gave an all-expenses-paid, seven-day Celebrity Cruise to every member of the audience, which was made up of friends and family of servicemen and women. The show, uplinked to the troops on Thanksgiving Day via American Forces Network, featured actor Tom Hanks, beloved by many in the military for his role in Steven Spielberg's *Saving Private Ryan* and his co-production of HBO's *Band of Brothers*. *Ellen* averaged a 3.4 rating/9 share in the metered markets, up 31% over its year-ago time-period average. It was particularly strong in Kansas City, Mo., where it scored a 5.8/14, up 107% over its year-ago average. It clocked a 6.5/18 in Detroit, up 97%.



DIVORCE COURT

November Success!

Divorce Court Hits 70 Week High!

3.9 HH

...AND #2 TO JUDGE JUDY IN W18-49



Source: NSS, Galaxy Explorer, 70 wk high = HH GAA Rig w/ 11/8/04 vs. 7/14/03-11/1/04, #2 = W18-49 GAA Rig w/ 11/8/04 tied w/ Judge Joe Brown

STATION TO STATION

Sweeps Results

How top five markets fared

By Allison Romano

November sweeps aren't quite what they used to be—at least in the top TV markets.

Thanks to Nielsen's new local people meters (LPMs), currently operating in New York, Boston, Los Angeles, Chicago and San Francisco, stations are bombarded daily with overnight demographic ratings—data previously available only during four-times-a-year sweeps. Of the top five markets, only Philadelphia remains on the old paper "diary" system. Next year, LPMs are heading there—as well as to Atlanta, Dallas and Detroit. But, for the 205 TV markets still on the diary system, sweeps determine local TV's ad prices.

And sweeps remain a national fixation.

The networks load up prime time with fresh programming, theatricals and specials; stations ratchet up promotion and news stories. "We have a hybrid mentality," says Emily Barr, president and GM of ABC O&O WLS Chicago. "We wanted to take advantage of what ABC was offering, and we've stepped things up slightly."

In Boston, CBS O&O WBZ adopted a similar approach. "There is still a sweeps mentality at the



WLS Chicago 10 p.m. anchor team

networks. I put my best foot forward in those months," says station President Julio Marengi.

With November wrapped up, here's a look at preliminary Nielsen data from the five largest television markets.

New York

The NBC and ABC stations split key newscasts in this market. NBC's flagship WNBC nabbed 11 p.m. with a 7.2/13 in households and 4.1/11 in 25-54s. ABC-owned WABC and CBS' WCBS tied for second in the demo, each with a 3.3/9. With a little help from its Oprah lead-in, WABC won at

How Fall Played Out

CBS triumphs, ABC improves, NBC falters **By Jim Finkle**

How times and CBS have changed. In 1980, the last time CBS could claim a November sweeps victory in the 18-49 demo, it was a demo class advertisers didn't even care about.

To give some historical perspective, CBS was helped back then by the "Who Shot J.R." *Dallas* episode, which weighed in with a 53.3 Nielsen household rating and 83 million viewers, still the second-highest numbers for any TV show. (This season, the top-rated show, a *CSI* episode, attracted 31.5 million viewers.

So when CBS won the 18-49 November-sweeps crown from NBC last week, it wasn't just a victory. It was a jarring milestone. And the race wasn't even all that close. CBS pulled a 4.5 rating/12 share among 18-49s. Next came ABC at 4.0/11 and NBC with 4.0/10. Fox was fourth with 3.0/8, followed by The WB with 1.6/4 and UPN with 1.5/4.

Les Moonves, Viacom's new co-president and co-COO and the mastermind of the CBS comeback, was crowing about a new era for the network. Could be. Indeed, CBS can now get young viewers even when it's not trying: Last week, when CBS aired *Rudolph the Red-Nosed Reindeer*, its 18-34 ratings were up 34% from a year ago—and it has been on every holiday season for 40 years. Go figure.

"With this significant a change for us, there will definitely be more money coming into us in May," says Moonves. "These ratings are absolutely going to translate into dollars, especially on Thursday night."

Meantime, new NBC Entertainment President Kevin Reilly was contrite after taking his first pasting. "I can't say we like being beat," he said in a conference call, noting that it will be tough for NBC to make a Thursday-night comeback before the end of the 2004-05 season. That's a night NBC used to own.

NBC's average sweeps audience was down 9% from last year among 18-49s. That was the biggest drop of any of the Big Six broadcast networks. CBS gained 7%, ABC gained 8%. Fox fell 3%; UPN was down 6% and The WB was unchanged.

Reilly is pinning NBC's hopes on four shows slated to debut before February. There are two sitcoms: *The Office*, the highly touted U.S. version of British hit, and *Committed*, about a neurotic New York couple who fall in love.

Also, NBC is airing one drama and a reality show: A psychic crime solver is the hero of *Medium*, and gorgeous women compete for a photo shoot and a modeling contract on *The Sports Illustrated Swimsuit Model Search*.

How November fared day by day:

Monday: *Everybody Loves Raymond*, *Two and a Half Men*, and *CSI: Miami* kept CBS on top with a 6.1 rating (up 11% from last year). NBC plunged 19% as *Fear Factor* lost steam.

Tuesday: *The Biggest Loser* and *Law*



Without a Trace boosts CBS on Thursday.

& *Order: Special Victims Unit* helped NBC win this night with a 4.6 rating, but CBS is 0.1 behind, thanks to *The Amazing Race 6*. Fox is the big loser with ratings down 34%. Blame *Rebel Billionaire*.

Wednesday: ABC's *Lost* is an amazing find, putting ABC on top with a 4.8 rating. The biggest gainer of the night is UPN, up 36% at 1.9, due to *America's Next Top Model* and *Kevin Hill*.

Thursday: What happens when Joey, Will, Grace, The Donald and the entire cast of *ER* face off against *Survivor*, *CSI*, and *Without a Trace*? NBC loses. Final 18-49 score: CBS, 8.1, NBC, 6.7.

Friday: NBC wins with a 2.9 rating, helped by *Medical Investigation*. ABC's sitcom-heavy shows fell, dropping from a 3.0 to 2.5 rating.

Saturday: Fox's 3.1, with *Cops* and *America's Most Wanted*, still rules.

Sunday: *Desperate Housewives* makes for a happy Sunday drive down Wisteria Lane giving ABC a 6.6 rating for the night. That's up 89% from a year ago. NBC is last among the Big Four, with a 3.5 rating.—with P.J. Bednarski

18-49s HAVE SPOKEN

Networks' average rating for November sweeps

	WINNER	LOSER
Monday	CBS (6.1)	Fox (3.3)
Tuesday	NBC (4.6)	Fox (2.3)
Wednesday	ABC (4.8)	Fox (3.1)
Thursday	CBS (8.1)	ABC (2.3)
Friday	NBC (2.9)	Fox (1.8)
Saturday	Fox (3.1)	CBS (1.8)
Sunday	ABC (6.6)	NBC (3.5)

SOURCE: Nielsen Media Research

5 p.m. in households (HHs) (6.9/15) and adults 25-54 (3.0/14) and at 6 p.m. in HHs (6.9/14) and adults 25-54 (2.7/11). In prime time, New York delivered NBC's only No. 1 finish in top markets in adults 25-54 with a 5.6/12.

Los Angeles

Among English-language broadcasters, NBC-owned KNBC claimed the top spot in late news, but ABC O&O KABC won out in early evening. Weekdays at 11 p.m., KNBC registered a 3.2/12 in adults 25-54, while KABC and KCBS tied for second, each with a 2.2/8. KABC claimed the highest demo ratings for 4, 5 and 6 p.m. newscasts. In prime time, KABC eked out a win among English-language stations with a 3.7/10 in adults 25-54, followed by KNBC (3.4/9), KCBS (3.2/8) and Fox O&O KTTV (2.4/8).

Chicago

With winning newscasts and a revived ABC prime time, ABC O&O WLS reigned as the dominant player. In November, It boasted the top-rated newscasts at 5 and 6 p.m. and late news. Its 10 p.m. newscast scored best, an average 12.2 rating/20 share in HHs and a 5.7/15 in adults 25-54, edging out NBC O&O WMAQ in households (9.6/16) and 25-54s (5.4/14). In prime, WLS commanded an 8.3/13 in households and a 5.0/13 in 25-54s, for more than a full-point lead over WMAQ and CBS-owned WBBM.

Boston

In the 11 p.m. news race, CBS O&O WBZ grabbed top marks in adults 25-54 (4.9 rating/16 share) and a second-place finish in households (6.9/15) behind NBC affiliate WHDH (7.8/17). WBZ recorded its best late-news demo ratings in 11 years. Thanks to CBS' red-hot prime time, WBZ finished No. 1 in the market in prime in HHs (7.1 rating), adults 18-49 (5.4) and adults 25-54 (7.1).

Philadelphia

Without LPMs, Philadelphia stations still rely on the ratings book, which arrives in a few weeks, for demo data. On a household basis, ABC O&O WPVI won early and late news, but CBS-owned KYW is surging, moving to second place in 11 p.m. news from third in November 2003. At 6 p.m., WPVI notched a 14.0/23 and NBC-owned WCAU was second with a 6.2/10. At 11 p.m., WPVI nabbed an 11.6/19, while KYW recorded a 10.3/17. Prime time belonged to KYW with an 11.7/17.

AT A GLANCE

The Market

DMA rank	29
Population	2,182,000
TV homes	967,000
Income per capita	\$17,655
TV revenue rank	33
TV revenue	\$171,600,000

Commercial TV Stations

Rank*	Ch.	Affil.	Owner
1	WRAL	5 CBS	Capitol Bcstg.
2	WTVD	11 ABC	ABC/Disney
3	WNCN	17 NBC	NBC/GE
4	WRAZ	50 Fox	Capitol Bcstg.
5	WRDC	28 UPN	Sinclair Bcstg.
6	WLFL	22 WB	Sinclair Bcstg.

*May 2004, total households, 6 a.m. to 2 a.m., Mon.-Sun.

Cable/DBS

Cable subscribers (FH)	599,540
Major cable operator	Time Warner Cable
Cable penetration	62%
ADS subscribers (HH)**	222,410
ADS penetration	23%
DBS carriage of local TV?	Yes

**Alternative Delivery Systems, includes DBS and other non-cable services, according to Nielsen Media Research

What's No. 1

Syndicated Show	Rating/Share***
Inside Edition (WRAL)	6.5
Network Show	
CSI (WRAL)	17.6
Evening Newscast	
WRAL	12.1
Late Newscast	
WRAL	9.9

***May 2004, total households

SOURCES: Nielsen Media Research, BIA Research

Southern Comfort

Eclectic industries drive colorful market **By Allison Romano**



11 p.m. news team at CBS affiliate WRAL Raleigh-Durham, N.C.

Capitol Broadcasting's CBS affiliate, WRAL. Both his station and ABC O&O WTVD have choppers, and all local broadcasters have several news bureaus dotted throughout the region. The challenge is to cover both urban and rural areas while making the news relevant to all viewers. Economically, however, the market is thriving.

In 2004, Raleigh-Durham TV stations will take in an estimated \$172 million, per BIA Research, up 10% from 2003. Car advertising accounts for 35%-40% of bookings, say station execs. Political spending brought in approximately \$12 million this year, but even without it, the DMA's ad market is hearty, up about 10% through the first three quarters of 2004. That's better than many larger cities, like Detroit or Cincinnati, where ad growth is pacing in the low single digits. "We were hit by the technology downturn," says Bernie Prazenica, VP/GM of WTVD, "but the market is firming up, and you can feel the progress."

WRAL is king of local news. The station commands top ratings in early evening and late news and competes vigorously with WTVD in early-morning news. Locally owned Capitol also owns the Fox affiliate WRAZ, and the WRAL newsroom produces its sister station's 10 p.m. newscast. WNCN is an NBC O&O; Sinclair Broadcasting runs the local WB and UPN stations: WLFL and WRDC, respectively.

Time Warner Cable is the dominant cable operator here, offering an interconnect that can reach up to 1.6 million cable homes in North and South Carolina. The operator also runs regional news channel News 14 Carolina.

Local talent scores big with viewers. College basketball is extremely popular, and Raleigh-Durham has been among the top metered markets for *American Idol*, thanks to homegrown stars Clay Aiken, originally from Raleigh, and Fantasia Barrino, who hails from nearby Greensboro. Last spring's *American Idol* finale nabbed a 31.3 rating/45 share. Only the 2004 Super Bowl, featuring the Carolina Panthers, scored better: a 49.2/66.

Another plus: A growing populace, coupled with a reasonable cost of living, bolsters retail spending. Says John Shannon, VP of sales for NBC's WNCN: "This is an up-and-coming vibrant area." ■

From high-tech communities to military bases, the Raleigh-Durham-Fayetteville, N.C., region is fueled by a diverse economy. The country's 29th-largest TV market encompasses three large cities, their sprawling suburbs and surrounding rural counties. And each is distinct: Raleigh is the state capitol, Durham has renowned medical centers, and Fayetteville has a strong military presence.

To service such an expansive market, "a helicopter isn't a nicety, it is a necessity," says Jim Hefner, VP/GM of

THE DEMOS

North Carolina is NASCAR country, and 29% of the market are auto-racing fans, double the national average. They also take advantage of the area's many universities: 20% participate in adult continuing-education.

WHO	SHARE OF POPULATION	INDEX*
18-34	35%	112
18-49	66%	107
25-54	60%	103
35+	65%	95
Married	57%	103
Never married	25%	99
College grad	25%	103
White	69%	84
Black	27%	225
Hispanic	7%	51
Asian	NA	NA
\$100K+ HH	11%	73
\$50K+ HH	43%	87
Below \$50K HH	57%	112



BY THE NUMBERS**

Adult continuing education	20%	134
NASCAR fans	29%	152
HHs with satellite dish	26%	134

*Index is a measurement of consumer likelihood. An index of 100 indicates that the market is on par with the average of the 75 local markets.

NM = Not large enough to be measured

**Activities engaged in past 12 months

SOURCE: Scarborough Release 1 2004 75 Markets Report (February '03-March '04)

NEXT: ROCHESTER, N.Y.

Louisville's Got Life & Style

WHAS Has A Brand New Point of *You* at 10:00am With *Life & Style!*

3.5 HH RATING!

+25% WEEK TO WEEK!

+6% OVER YEAR AGO PROGRAMMING!

www.sonypicturestelevision.com



Source: NSI Louisville, 11/22-11/25/04, M-Th, 10AM. Prior week = 11/15-11/19/04. History = Nov '03 sweep.

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On the Horizon

Independent media shop revs up to take on the big boys

The world of media buying is dominated by conglomerates. Major players like Omnicom's OMD, WPP's MindShare and Interpublic's Initiative Media are all controlled by multinational concerns. But among giants, there is one big independent standing: Horizon Media.

In Wall Street parlance, Horizon is the biggest "pure play": Media buying is all it does. And that's what some in the industry say gives it its edge.

"There's no one else like them," says Mike Lotito, CEO of Media IQ, a company that monitors the performance of media agencies for big marketers.

HORIZON

MEDIA, INC.

The Marketing Driven Media Services Company

To stay competitive with Madison Avenue and appeal to major clients, Horizon Media is taking a sophisticated approach to media strategy, planning and research.

That distinction means Horizon can compete with industry giants but can offer something they can't: the aura of neutrality many marketers demand. Clients don't get lost in a mega-shop, so their media plans aren't tainted by any in-house sister-agency bias, creative or financial. (For example, if Leo Burnett comes up with a great 30-second spot for Procter & Gamble, Starcom MediaVest has to develop a TV plan around it.) And the positioning works: Horizon pegs its latest media billings at \$1.1 billion.

"We like to say we're the smallest of the largest and the largest of the smallest," says Horizon Media President and CEO Bill Koenigsberg,

who formed the company in the late 1980s.

But that strength has a downside: Horizon is often pigeon-holed as strictly a spot-buying shop. It's true the company is more agile than bigger agencies, says Steve Fajen, managing director of Morgan Anderson Consultants, "but it's easy to think of them simply as a spot-buying shop." Indeed, about 50% of Horizon's buys are for local media, mainly spot TV, radio and outdoor outlets, and the preponderance of its clients are retail-oriented.

Finding Its Niche

Today, Horizon handles media for 85 brands—including Vivendi Universal's videogame division, Earthlink and IKEA—and 15 smaller agencies, such as The Media Kitchen. It's also evolving an increasingly sophisticated approach to media strategy, planning and research, reinvesting in its systems and resources to strategically compete with Madison Avenue.

For instance, it opened an outpost in Amsterdam and will add a London office in 2005. Horizon is also investing heavily in original research to determine the most effective ways to use media. The agency just embarked on a proprietary study on the impact of ad clutter on the effectiveness of outdoor-media buys. And Koenigsberg says the agency has struck deals with two companies he describes as "next-generation" researchers.

But while Horizon's emphasis on competing with the big boys keeps it aggressive, independence has its price. "They're kind of a strange cat. They're not really a second-tier media service, but they're not one of the first-tier, either," says Fajen. "They're somewhere in between." However, he notes that key staffers, such as experienced network buyer Aaron Cohen, Research Director Brad Adgate and Media Director Ruby Gotlieb, strengthen the shop's expertise.

What Horizon lacks in clout, it tries to make up for in service.

The Rebundling Trend

"We're competing with these global entities because of a trend I call 'rebundling,'" says Koenigsberg. While agencies have unbundled their media departments into separate companies, he says, the trend is to effectively rebundle the accounts after the fact.

A major agency holding company gets the creative and, by default, the

holding company's media unit gets the media account. "By contrast, every piece of business we get is based on the strength of our media services," adds Koenigsberg.

To date, Horizon has focused on smaller accounts in the \$5 million to \$10 million range, such as Jos. A. Banks and Monro Muffler, or

been hired by small creative agencies to buy their media. But now, Koenigsberg says, thanks to its added research muscle, Horizon is positioned to pitch big blue-chip accounts.

To support his belief, he cites Carat's recent win of Procter & Gamble's communications planning account, which he dubs "an unbelievable event in the media business." It paves the way for other media shops unaffiliated with creative agencies to pitch and win major accounts.

When Carat won P&G's communications planning account, it opened the door to shops that concentrate solely on media.

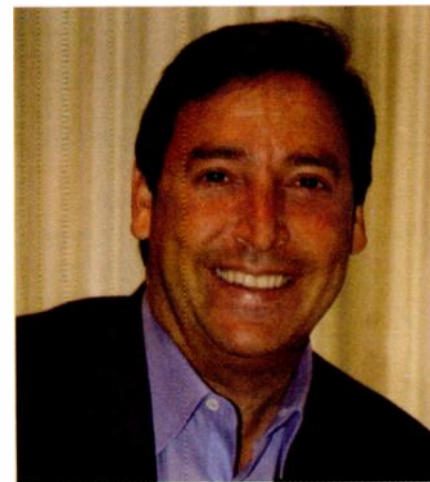
While Horizon forges ahead in research and strategic planning, its reputation rests on its TV-buying history. In the 1980s, when some of the biggest independents were selling out to agency holding companies, Koenigsberg held his ground. Horizon was formed when he and Don Miller bought the shop from broadcast operator Media General and took it private.

Back then, Horizon was known as a spunky retail-heavy agency that specialized in "time-banking," a practice in which media agencies provided cash advances to TV and radio stations in exchange for cheap ad inventory they banked and doled out to clients.

A Promising Future

But the consolidation of the station business into big, publicly held companies reduced the need for stations to get cash advances, essentially rendering the practice obsolete. At the same time, big ad agencies in Europe began unbundling their media departments to compete more directly with independent media-buying agencies.

When one of the biggest, Aegis



CEO Bill Koenigsberg formed Horizon Media in the 1980s.

Group's Carat, opened up shop in the U.S., it sparked a wave of unbundling and consolidation here. The result: a handful of major independent media buying agencies, all controlled by holding companies.

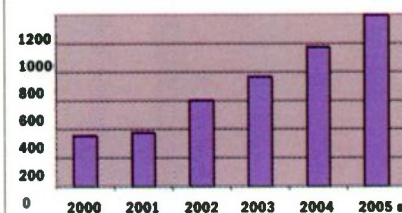
The trend was a turning point for Horizon.

The void created by consolidation helped fuel its growth. Smaller retail-oriented advertisers worried about the generic approach of bigger buying agencies, and smaller full-service ad agencies looking to outsource their media buying turned to Horizon. That two-pronged approach proved a winning formula. Now the shop buys media for more TV outlets than any other media shop, including all NBC Universal broadcast and cable networks and A&E Networks.

"These are some of the smartest media marketers in the business, and we are proud they came to us to manage their media," says Koenigsberg of his TV clients. He insists the business has enhanced this agency's skill set: "It gives us an insider's perspective on programming and technology developments. That's something most media buyers never get to see." ■

GROWTH PATTERN

Horizon Media billings 2000-05



e = estimated

SOURCE: Horizon Media

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World Radio History

Shifting Realities

In Los Angeles, the swing to unscripted fare means new winners and losers in TV production **By Deborah Starr Seibel**



Contestants on *American Idol* are among the few actual performers who stand to make any money out of the reality genre.

As it turns out, this unscientific assessment of a shift in the local economy is right on target. This year is expected to be a record-breaker for on-location TV production in Los Angeles.

The reason? "Reality television," says Steve MacDonald, president of the Entertainment Industry Development Corp., the private, non-profit organization charged with issuing location permits. Of course, reality shows rely on on-location shooting, as opposed to shooting on studio sound stages, which do not require special permitting.

Reality TV has hit Hollywood like a tornado, rearranging local economics as it creates new winners and losers in the TV community. By the end of the year, TV production days—for TV movies, dramas, sitcoms, reality, pilots and newsmagazines—should number more than 18,000 (compared with 14,395 in 2003). In its first year to be recognized as a category, "reality is taking 49% of the television production days," says MacDonald, more than twice as many days as its closest competitor, television dramas (23%).

Bachelor, *American Idol* and *Extreme Makeover* are just a few of the shows shot in L.A. But with the deluge of new location-permit applications and the steep

rise in total TV-production days, reality TV is having the powerful effect of shifting local economic realities. "We call it the multiplier impact," says Jack Kyser, chief economist at the Los Angeles County Economic Development Corp.

Money ripples from production sites to local hotels, eateries, transportation services, and clothing and home-furnishings shops. "If you're doing a reality series and you're on location, you have to buy stuff to make it look decent," says Kyser. "You probably have to put people up in hotels, and they'll eat out in restaurants. All of that brings in sales tax."

How much sales tax? "The rule of thumb," he says, "is that whatever a production company spends on a production [including salaries, film, rentals, permits and post-production editing], you can multiply by 2.8 to get the total impact on the economy." That means for every dollar spent on a television production, almost \$3 will flow into the local economy because the people working on that production will be consuming local goods and services—from gas to granola. By these estimates, a relatively low-budget reality

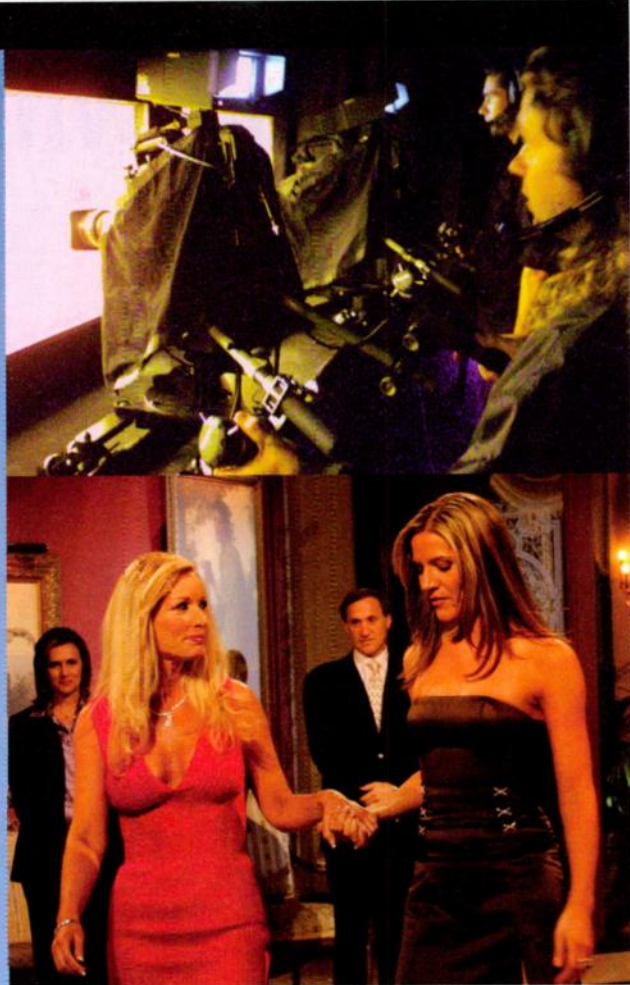
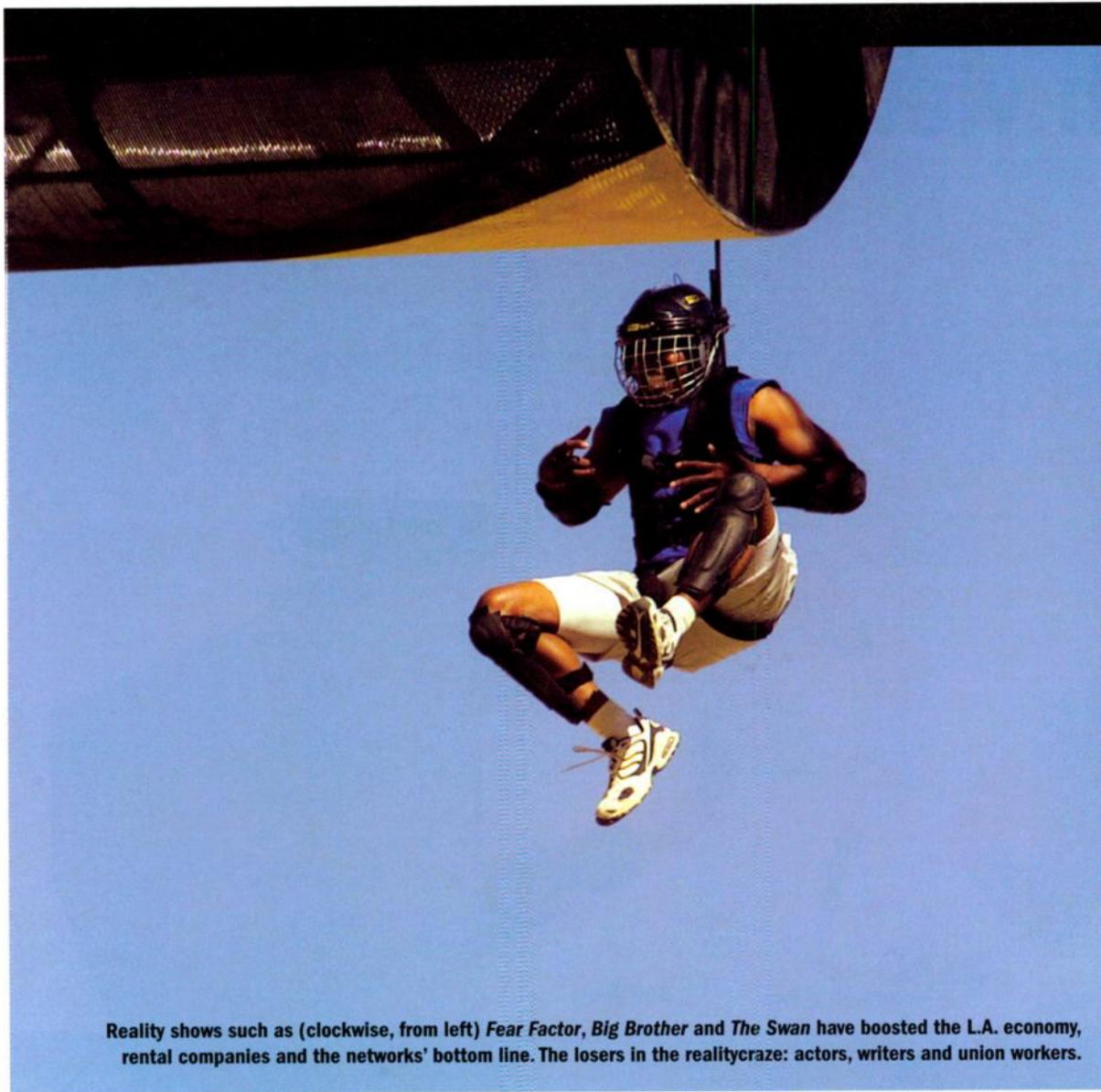
Continued on page 20

You can tell what's going on in the entertainment industry by looking at what's happening in the restaurants," says Dick Carter. Based in Sherman Oaks, Calif., a hotbed of Hollywood production, the restaurant real estate consultant has the perfect perch for observing Hollywood's economic ebb and flow. What's happening, he says, is a surge in business unlike anything he has seen before.

"By the end of August, it was like somebody flipped a switch," Carter says. "The restaurants were packed."

Playing with viewers for 10 years...





Reality shows such as (clockwise, from left) *Fear Factor*, *Big Brother* and *The Swan* have boosted the L.A. economy, rental companies and the networks' bottom line. The losers in the reality craze: actors, writers and union workers.

Shifting Realities

Continued from page 18

episode—around \$300,000—will put \$840,000 into the tills of local merchants and service industries.

On any given day in Los Angeles, some 30 productions are filming, 13 of which are reality. The networks and production companies benefit because reality can be produced for a fraction of what it costs to create scripted dramas and sitcoms. One episode of *The West Wing* can push the \$2 million mark. And actors command high salaries: For example, *Everybody Loves Raymond*'s Ray Romano and *CSI*'s William Peterson demand \$1.8 million and \$500,000 per episode, respectively.

The swing to reality may be good for the networks, but actors and writers have been devastated because their contributions aren't needed. Scripts are replaced by strategic editing of raw footage to create drama. Real people take the place of actors.

"The only performers with a piece of the reality pie are those doing an actual performance [*American Idol*, *Last Comic Standing*, *Star Search*], as opposed to just being themselves, or doing the announcing, hosting, stunt work or voice-over work," says Rebecca Rhine, assistant national executive director for the American Federation of Television and Radio Artists (AFTRA).

Most reality shows are non-union, which generally means that the pay scale is significantly lower and benefits are non-existent.

"These are kind of like Wal-Mart jobs," says Steve Dayan, a 20-year location manager and now business agent for Teamsters Local 399, which represents loca-

tion managers, drivers and animal trainers. "The people taking them are people who are trying to break into the industry. Or they're people who are in the union—my members—and they take these jobs because there are fewer episodic shows and they're forced to take them in order to feed their families."

Also, he adds, in the flood of low-budget reality productions, there are no workplace rules and little supervision: Workers can be pushed to work 20-hour days, and there are no safety standards for the drivers. "Our guys are all randomly drug- and alcohol-tested," he explains, "so you know the guy behind the wheel, the guy driving the production van" is doing the job safely.

For the unions that have the option of working on reality shows—including the Directors Guild, the Teamsters and the International Alliance of Theatrical Stage Employees (IATSE)—reality TV has been a mixed blessing.

"It has had a serious impact on the employment numbers," says Thom Davis, the business representative for IATSE Local 80, which oversees grips and craft services. "On a one-hour episodic, you'll have five or six grips on a daily basis and more as needed. But on these reality shows, they've got minimum crews. They might have two grips, three electricians, one prop guy, a bunch of camera guys and one sound guy. So instead of having a crew of 50-plus people, they have a crew of 12." But Davis encourages his members to take the jobs "because, quite frankly, that's what helps us organize the shows."

At least 15 reality shows have been organized by the unions, including *American Idol*, *Queer Eye for the Straight Guy*, *Average Joe*, *The Swan* and *Fear Factor*. For the most part, though, they are still "run-and-gun operations," says Bruce Doering, a union rep for

IATSE's 5,800 camera operators and cinematographers nationwide, including 4,200 in Los Angeles. "Reality television uses a lot of cameras, but it's really down-and-dirty work and they really exploit the crews."

Reality TV is "undermining our traditional base: sitcoms and one-hour episodics," says Doering. "But on the other hand, the industry is changing, and we have to respond to the challenges. And some of those shows are very, very profitable."

Profitability, of course, is the main reason the reality genre has grown so much so fast. Many of the shows can be done on the cheap.

Tech suppliers are also among the beneficiaries of the shift to reality, particularly videotape manufacturers. A reality show eats up a lot of tape—anywhere from 1,500 to 6,000 tapes per season, where a traditional drama or sitcom will use 300-500. "We've definitely seen an uplift in sales due to reality of new media like tapes and even optical discs," says Jo Ann Vozeh, director of marketing, media and application solutions division, Sony.

Rental companies are also seeing a reality uptick. "It's definitely a boom for the rental companies in terms of the amount of hardware, software and networked storage these programs require on an ongoing basis," says Gary Migdal, president and CEO of LA Digital, which rents out gear for use on *Survivor* and *The Apprentice*. Reality also needs about four times as many editing systems as scripted fare.

But the spoils aren't going to everyone equally. "The people who are benefiting are the studios and the networks," says Brent Swift, a production designer and co-founder of the Film and Television Action Committee, a grassroots organization created to deal with the problem of runaway production. Even if the shows stay in Los Angeles, it's a win-lose situation for the people on the front lines.

"It isn't solving the problem," Swift says. "It's all about jobs, and these shows are employing minimal crews. Reality isn't bad news, but it's not enough." ■

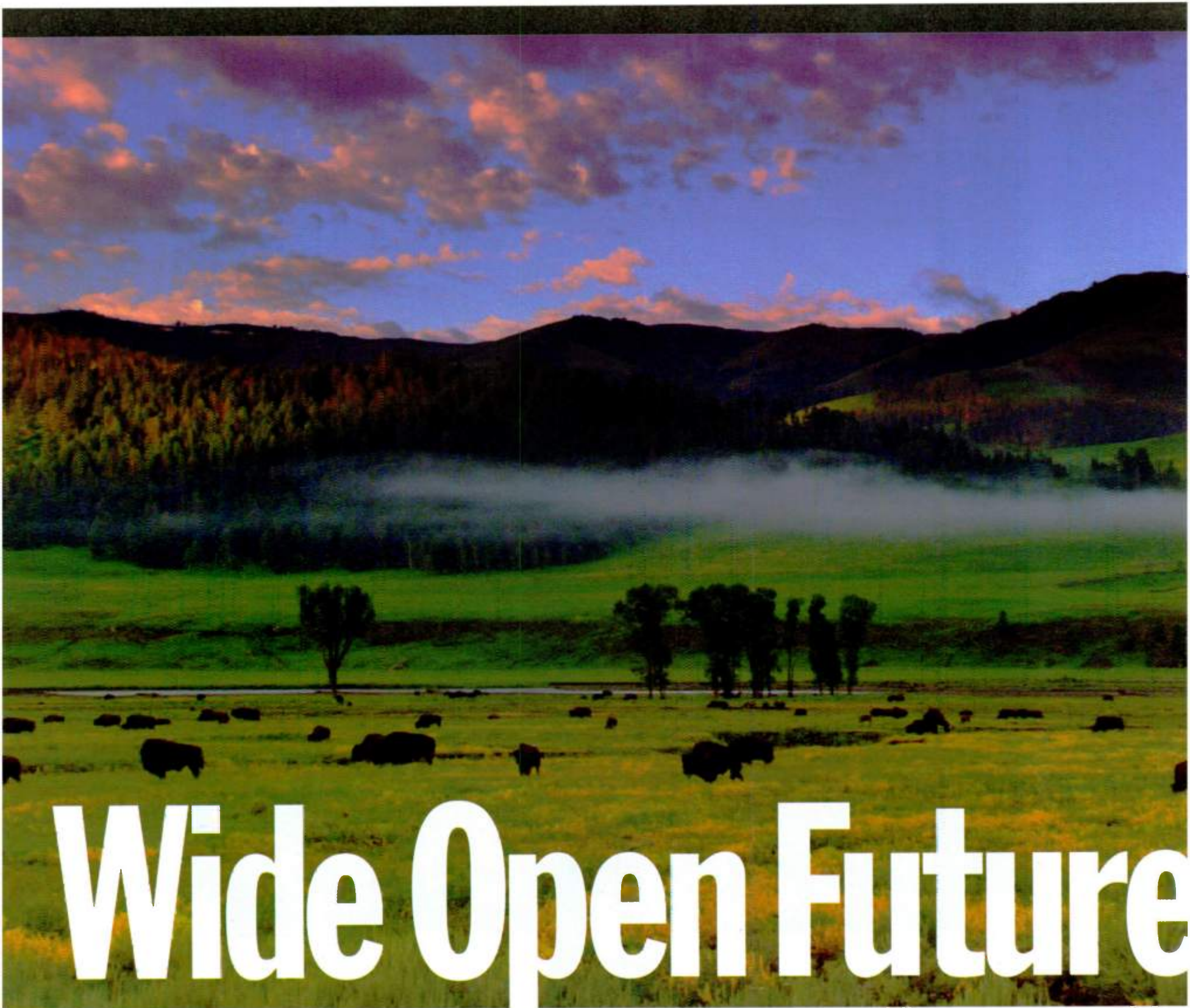
Additional reporting by Ken Kerschbaumer

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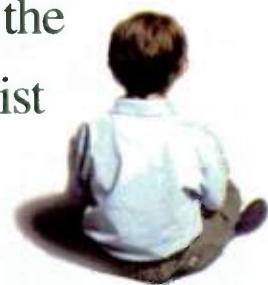


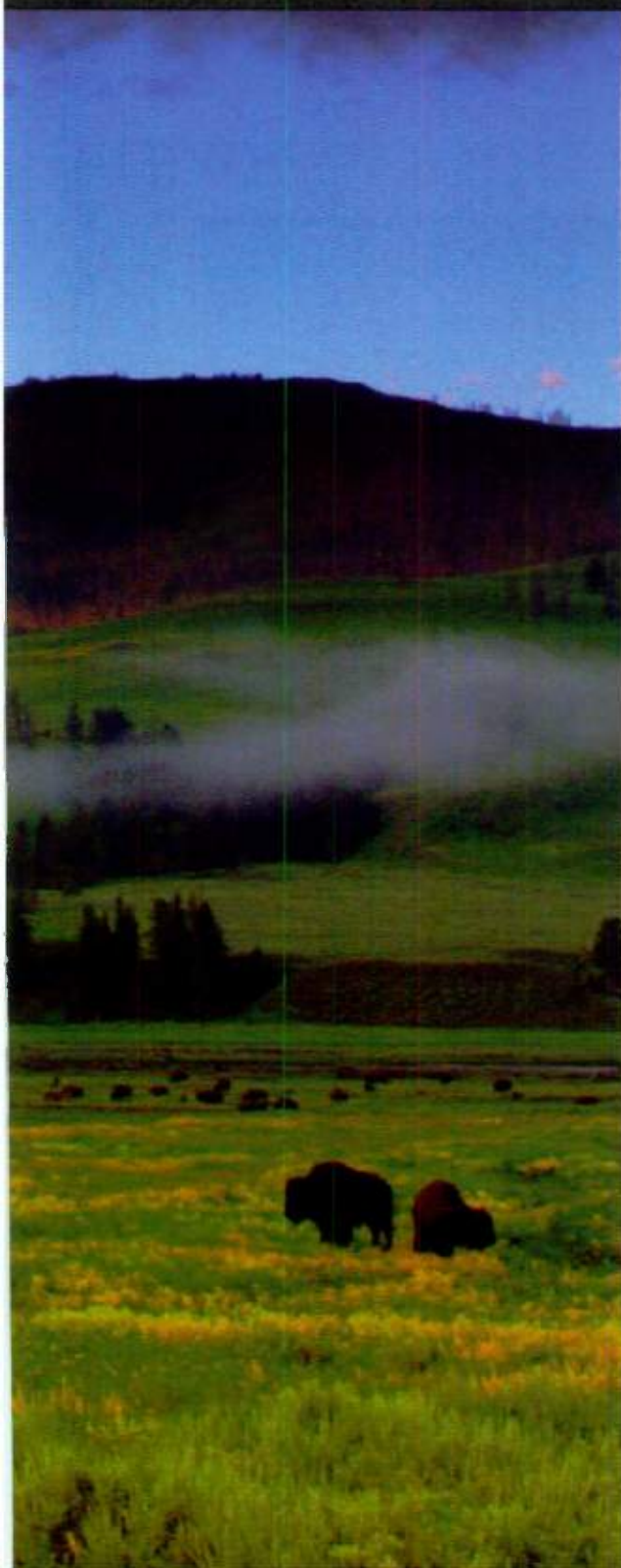
Wide Open Future

HDTV sales are on track to expand to 50 million sets by 2007

BY KEN KERSCHBAUMER

The stillness of night gives way to the soft light of morning in the heart of the Lamar Valley in Yellowstone National Park. Dark purple clouds roll over the mountains and the herd of bison below. As the sun slowly rises, a mist forms above the herd, and the valley floor is delicately illuminated. It's a new day in the valley, and a new day for Discovery HD.





Sunrise In Yellowstone National Park

The percentage of homes tuning in to HDTV programs is poised to make a big leap beginning in 2006: from 30% of all homes to about 50% of all U.S. homes by the end of 2007, according to the Consumer Electronics Association. That's more than 50 million HDTV sets by 2007.

Right now, only about 3 million homes have high-definition TV, though many millions more think they do (see related story, page 26).

This Christmas selling season should give HDTV an essential push.

The price for an average HDTV set will come down to around \$1,300. (They're still not cheap, but a bargain hunter can get lucky: Sanyo, for example, sells a 32-inch HDTV tube-based monitor for \$699.) The Consumer Electronics Association predicts that about 6 million HDTV sets will be sold this year—which will just about double the number of HDTV sets in operation nationwide. Another 9 million will be sold in 2005.

When that happens, even more HDTV programming—limited now by high cost and a lack of advertising revenue—will start to flow onto networks. The 40 or so cable and broadcast networks currently dipping their toes in the HDTV waters will dive in with continuous programming.

"When 15 million homes start tuning in with HDTV sets, you'll start seeing the shift," says John Hendricks, Discovery Channel founder and a digital-TV prophet. Then Nielsen will start tracking what's on. "Everybody will be waking up. When that happens, everyone will be desperate for a feed, but they won't be able to get the bandwidth."

The growth is happening for retailers. "We're seeing people come in with a much better idea of what they want," says Ed Maloney, president of Jackson, Miss.-based Cowboy Maloney's. "They go to a friend's house and see HD, and it's a combination of word of mouth and 'word of eye.' That sells a lot of sets." In terms of dollars, he says, HDTV sales at his stores are growing about 20% a year.

Although it's mostly the major broadcast networks and cable movie and sports channels sending out HDTV now, another wave of as many as 30 networks will step up to HD in 2005, predicts Mike Antonovich, vice president of global sales and marketing for satellite provider PanAmSat, which already operates a high-def satellite service it calls the "HD neighborhood."

But there is also confusion. "Extended-definition" (EDTV) flat-panel plasma and LCD digital TVs—which are not necessarily high-resolution units—are now the rage, and some consumers seem willing to sacrifice picture quality for aesthetics, especially as prices fall.

But retailers maintain that the high-definition picture is hands-down better—and consumers will inevitably catch on.

Maloney wonders, why not go whole hog? "If you're going to spend all that money for an 'extended-defini-

tion' TV plasma screen, spend a little bit more and get an HD set," says Maloney. "Why spend something on a 'high-look' technology but not the high-performance technology?"

The movement on retail sales floors is prodding programmers to get going. Now more than ever, all aspects of TV production, from sunrises to sports, are adapting to HDTV production. Directors, camera crews, makeup artists and, of course, talent are rethinking the way they tell stories, shoot scenes and do business.

Sunrise Earth producer Dave Conover, for example, shot 23 sunrises with Compass Light, his production company. Crews of four went to various locations with two new Sony F900 cameras each to capture a world awakening. The show is already catching on; a second season is in the works.

Shooting in high-definition is expensive, costing 25% more than standard-definition (SD) on average. With so few viewers, hardly any advertisers have signed up to sponsor broadcasts.

Still, trailblazing networks like Discovery and HBO—the latter now airs 70% of its schedule in high-definition—consider the expense an investment for the future.

Conover says high-definition scenes deliver the same thrill that viewers experienced more than a half century ago. *Continued on page 24*

HDTV: Can You See Me Now?

Sprint and AT&T Wireless already offer cellphones with live video streaming of more than a dozen TV channels; both companies tout the picture quality on the Lilliputian screen. Indeed, the jump from 1-3 frames per second last year to the current 15 frames per second "has hit a threshold that we think will be quite satisfactory for the consumer for quite a long time," says Jeff Hallock, vice president of data product and strategy for Sprint's Consumer Solutions division.

By 2007, Texas Instruments hopes to come to market with a DTV receiver chip that can be placed in a cellphone. It's not high-def, but, for cellphones, it promises to be far better than current video transmitted over cellular networks. Code-named "Hollywood," the chip will receive live digital broadcasts using new TV-transmission infrastructure that is in development for cellphones.

But hold on. Didn't Sony already flop with its little bitty Watchman in the 1980s, appealing mainly to those few goofballs who enjoy watching themselves watching TV in the stands at NFL games?

"It's a higher-quality experience than those Watchmans were," says Hallock, "and it's a richer lineup of content that can be on demand."

Still, the trend in consumers' taste for TV screens these days would seem to be toward gigantism, not miniaturization. Josh Bernoff at Forrester Research is skeptical: "Who wants that? It's one thing to send somebody a little video of yourself at your birthday party, but as for regular TV content—unlikely to catch on."—Mark Lasswell

Since September, the channel's viewers have been treated to *Sunrise Earth*, an hour-long program that gives them a chance to see something special: sunrise at the nation's most beautiful spots—without having to get up at 5 a.m. to do it (the show airs at 7 a.m.). It's also the kind of treat that makes consumers happy that they ponied up the extra bucks for an extra-big, extra-clear HD picture.

Discovery is one of the biggest bettors in an expensive gamble by TV manufacturers, networks and retailers that the tipping point for HDTV is at hand.

"They go to a friend's house and see HD, and it's a combination of word of mouth and 'word of eye.' That sells a lot of sets."

ED MALONEY, COWBOY MALONEY'S

Wide Open Future

Continued from page 23

ago when TV sets were first marketed. "What captured their attention was the magical access to a place on the planet that isn't just outside their window," he says. "And that's the goal of *Sunrise Earth*: to use HD's resolution and brilliance to make something as simple as a sunrise compelling to viewers."

Nature documentaries aren't the only shows playing with the new format. It takes only a few seconds for *CSI*'s "look" to sink in. The combination of lighting and color saturation gives the show a unique tone, and each of the three *CSI*s has its own color palette: *CSI: NY* gets an icy-blue tone; *CSI: Miami* is flecked in orange; and the original *CSI*, set in Las Vegas, is a story told in hints of green.

"We use different color palettes to differentiate storylines," says *CSI* executive producer Danny Cannon. Some scenes get different degrees of vividness. "A frightening storyline will be de-saturated while a more ironic storyline might be more saturated." The result are neon signs that pop, building exteriors that give a greater sense of decay, and a clarity in fog or mist that just deepens the dread.

Makeup: Compressor and a Hand-Held Nozzle

The extra detail that HDTV video allows puts more pressure not only on set design and lighting but also on actors and even news anchors. Many fear that HDTV will allow every unsightly scar or blemish to be blown out of proportion: There's nothing like a close-up on a 60-inch HDTV to make a shaving nick look like a bloody gash.

Helping on-air talent put their best face forward has always fallen to the makeup team. The solution? Put aside creams and embrace air brushes made by companies like TempTu and Dynair. Air brushes use compressed air to apply makeup in aerosol form via compressor and a hand-held nozzle with a pressure button. It takes a couple of weeks for anchors to fully embrace the technique, but the result is a foundation that fills wrinkles more effectively.

"It should be used for the foundation and to replace women's blush because it's so natural-looking and makes the skin look flawless," says ESPN makeup artist Annie Bean, who gets the network's anchor talent ready for ESPN-HD telecasts. "Then you can do what you've always done for the eyes and lips."

The key is getting the skin tone right, which means plenty of testing with lighting. "Without the right lighting, it will look terrible," says Bean. "Just make sure you start on the process way before you ever actually go to air."

Softer lights also soften HDTV's harsh close-ups, she adds, noting, "It puts more pressure on the director of photography."

For all the improvements, there is still one issue that all HDTV producers of events are grappling with: how to take full advantage of HD's widescreen 16:9 picture (16 units wide by 9 units high).

With 95% of the viewing audience still watching on standard-def sets (4:3 ratio, or four units wide by three units high), producers try to frame a shot so all the action takes place within the standard frame, generally rendering widescreen an afterthought.

CSI's Cannon, however, stays focused on widescreen production. "We only compensate slightly for standard TV when we lose certain parts of a face," he says. "But



we don't let standard TV hinder us." There's also a business reason for that: *CSI* has significant DVD sales, and consumers are accepting of the letterboxing required on a standard TV.

More important, high-definition DVDs are on the horizon. By the end of next year, four Hollywood studios—Paramount, Warner, Universal and New Line—will begin selling high-definition DVDs in the HD-DVD format (see related story on page 22). Players are expected to cost about \$1,000, and their introduction will complete the HD-content circle and open up another HD revenue stream.

While Cannon and those involved in TV dramas can serve both widescreen and standard-def viewers fairly easily, live- and sports-event producers aren't so lucky. Because the SD and HD broadcasts are derived from the same camera positions, the advantage of widescreen is never fully realized. Football fans watching a widescreen version could see the safety blitz develop if producers framed for widescreen. But they don't.

Jed Drake, ESPN senior vice president and executive producer, says tennis matches could be shot with a camera perched high at center court as opposed to behind the baseline. "Moving to only widescreen productions isn't an 'if,'" he adds, "but a 'when.'"

No More Big Analog Sets

When NBA Entertainment covers games in HD, it shoots them in widescreen and letterboxes them for standard viewers. But instead of having black bars on the top and bottom of the screen, it moves the picture to the top of the screen and places graphics at the bottom. The viewer at home doesn't even know it's letterboxed.

"This way, we give the SD viewer a bit of a look into the future," says Steve Hellmuth, NBA senior vice president, operations and technology.

As the sports leagues and networks try to figure out their HDTV programming over the next two years, one thing is certain: The audience will grow at an unprecedented rate. "We're well past the early-adopter stage," says Jenny Miller, director of industry trends for CEA.

One big contributor to the momentum: By the end of 2006, every TV larger than 13 inches will have both an

Pssst! Wanna Deal?

Here are nine HD monitors priced below \$1,000. With holiday sales, they may cost even less. All come with HDTV tuner.

- **Sanyo HT32744: \$699**
A 32-inch 4:3 direct-view monitor
- **Sanyo HT30744: \$699**
A 30-inch widescreen direct-view monitor
- **Samsung TX-P2670WH: \$699**
A 26-inch widescreen direct-view monitor
- **Dish Network: 34-inch widescreen bundle: \$999**
In the bundle: direct-view set, set-top box and antenna
- **Dish Network: 40-inch widescreen bundle: \$999**
In the bundle: rear-projection set with set-top box and antenna
- **Zenith C30W47: \$999**
A 30-inch widescreen direct-view monitor
- **Zenith C32V37: \$999**
A 32-inch 4:3 direct-view monitor
- **Samsung TX-P3071WH: \$999**
A 30-inch widescreen direct-view monitor
- **Samsung TX-P3275H: \$999**
A 32-inch 4:3 direct-view monitor

SOURCE: Fall 2004 HDTV Guide, published by TWICE and CEA

analog and a digital tuner. "When that happens, there will no longer be analog TV sets" over 13 inches for sale, Miller says.

Millions of analog sets, of course, will continue to be in use for years to come. As 2007 dawns, the picture will finally be in focus: HDTV has arrived. ■

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That's a Great Picture, But It Isn't HDTV

By Kevin Downey

Half the people who think they're watching HDTV really aren't. So says a new study just released by Durham, N.H.-based Leichtman Research Group.

On the consumer side, the general understanding of HDTV apparently is forgotten once consumers enter the big-box appliance stores, see the array of choices, and get blasted with facts and terms they don't understand.

They may end up walking out with digital TVs that have clearer pictures than their old analog models, or

HDTV BUYING TIPS

Afraid you don't know enough about HDTV to accurately assess your options? Here are some suggestions.

1. HOW WILL YOU GET YOUR SIGNAL?

Over the air or from a cable set-top box or satellite? If you're expecting over-the-air reception, make sure the set has an integrated tuner so you can receive the signals without spending more money on a receiver. But realize that you'll pick up only broadcast HD signals. If you expect HDTV through a cable or DBS set-top, you can opt for a TV without an HDTV tuner as long as it's HDTV-ready.

2. WHERE ARE YOU PUTTING YOUR SET?

Know the room you're putting the set in. For a home-theater experience, the viewing distance should be 2.5 times picture height. That means sitting about 8 feet away from a 50-inch TV.

3. WHAT ABOUT THE ENTERTAINMENT CENTER?

Flat-panel displays get all the buzz, but putting one in a 20-inch-deep entertainment center sort of ruins the effect. Look into a liquid crystal display (LCD) or a digital light-projection (DLP) unit and save yourself a few thousand bucks.

3. DO YOU KNOW WHAT YOU'RE GETTING?

If you're looking at flat-panel displays, be sure you have an in-store demo of the difference between enhanced-definition (EDTV) and HDTV; about 15% of the digital TV sets on the market are not HDTV-ready. Cheaper flat-panel displays are typically EDTV, with a resolution that tops out at DVD quality. So if you want the sharpness of HDTV, you need to steer clear of EDTV.

4. DO YOU KNOW WHAT YOU'RE NOT GETTING?

Not all programs are in high-definition, and here's the not-pretty truth. "People don't understand that, when they have HDTV and they are watching something that is not in high-definition, the picture looks blurry," warns Paul Compton of Skybird Installs of Britton, Mich., which helps consumers set up their HDTVs.—K.K.

sets that *could* get high definition if the buyer acquired the right accessories. But that great picture is just that, and not the real deal.

"People go to their friends' homes and say, 'Hey, isn't this incredible?' But they're really not watching HD," says Bruce Leichtman, LRG's president and principal analyst.

LRG based its findings on telephone surveys conducted with consumers, which were matched with data on the number of HD set-top boxes manufactured by companies like Motorola and installed by cable TV and direct broadcast satellite (DBS) services. LRG and other research companies estimate that only a small number of homes receive HDTV through an HD antenna.

Breaking Down the Data

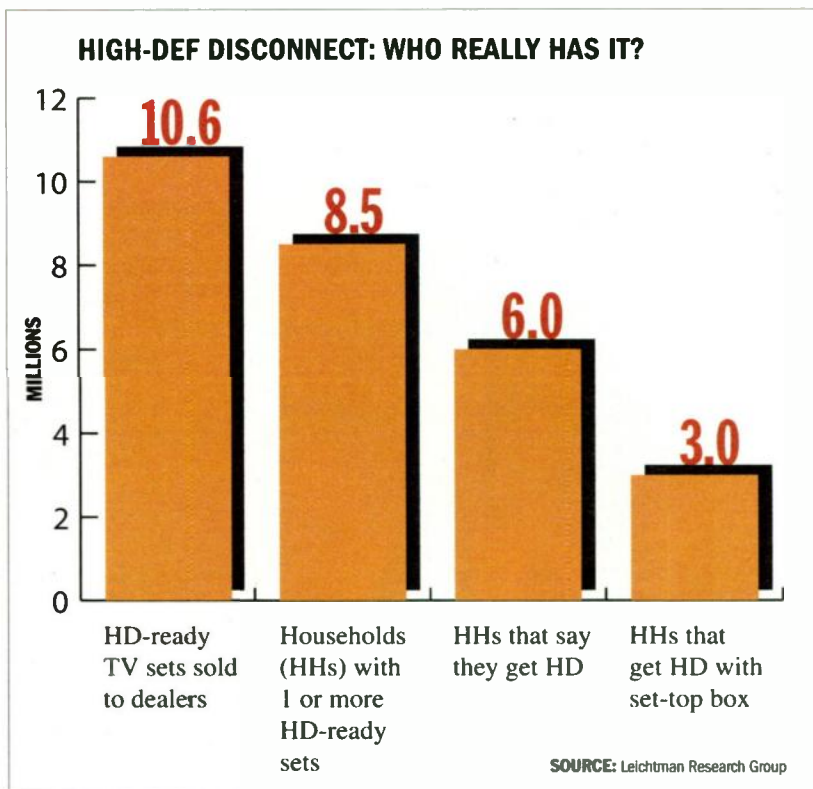
"You add that up, and the reality is that about 3 million [households] are receiving HD programming from cable TV or DBS," says Leichtman.

The Consumer Electronics Association says 13.3 million digital television sets have been sold to dealers since 1998. The CEA says only 87%, or about 10.6 million, of those sets are HD-ready. Then LRG discovered that 15% of HD homes have more than one set, which means high-definition sets are in only 9 million homes.

When LRG factors in the deployment of equipment needed to transform an HD-ready set into a set so that it actually receives an HD picture, the number tumbles down to 3 million homes. But twice as many households report they are watching HDTV.

Nielsen Media research says that there are nearly 109.6 million television households,

Shoppers face myriad options in picking an HDTV set this season.



which means, if LRG's data is right, HD is being seen in just 2.7% of all U.S. homes. To put it another way, the number of real HDTV households out there equals the total number of television homes in Chicago.

As with most new technology, HDTV will become less confusing for consumers and less challenging for advertisers as it becomes more commonplace. That will likely happen in a few years as HDTV becomes more widespread—the CEA estimates that more than 50 million homes will *really* be receiving HD signal by 2007—and as more networks offer programs in high-definition.

Not All Digital is High-Def

"There are so many ways that people are confused," says Laura Behrens, senior analyst of media industry research at Gartner/G2. "There are so many pieces of buy and so many things to consider. Not all flat-screen TVs are HD-ready, and not all flat screens are digital. And even screens that are high-definition may not have resolution that is very high."

There's also confusion among consumers about how to receive HD signals, according to Behrens. Most people who actually have HDTV get it through a cable TV or DBS service, which typically means installing an HD set-top box and paying a modest monthly fee for HDTV.

The FCC has a mandate that all TV sets larger than 13 inches come equipped with a digital receiver by the end of 2006, though that date has been a moving target. And that doesn't mean those sets will receive high-definition signals or even be HDTV-ready. Nor does the FCC mandate mean all programming will be in high-definition.

"The mandate is not for HDTV, although that's what gets talked about," says Behrens. "The HD is

Continued on page 28



THE FOUNDATIONS OF SYNDICATION

When it works, syndication is a powerful audience draw and an attractive advertising vehicle. But as NATPE draws near, it's also clear syndication is a tricky and intricate business. So for five weeks beginning with the Dec. 6 edition, *Broadcasting & Cable* will detail *The Foundations of Syndication*, giving our readers an up-close look at how the hits are made. We'll look at these component parts:

ISSUE: DECEMBER 13TH — THE FORMATS

SPACE CLOSE: DECEMBER 3RD

From game shows to talk shows to court shows, B&C will look at syndication's genres—what's hot and what's not, in off-net, magazines, reality and more.

ISSUE: DECEMBER 20TH — THE PRODUCERS

SPACE CLOSE: DECEMBER 10TH

Having a great idea for a show is only half the battle. Execution is key. B&C will look at the top producers of syndication's sturdiest hits to discover the tricks of the trade that keep some shows on top while other shows turn into flops.

ISSUE: JANUARY 3RD — THE EXECUTIVES

SPACE CLOSE: DECEMBER 23RD

They're the syndication honchos who green light what gets a "firm go" and what gets lost in the shuffle. B&C will talk to the top bosses at the top studios to get their view on the business, the competition and the future.

ISSUE: JANUARY 10TH — THE STATION GROUPS

SPACE CLOSE: DECEMBER 30TH

In the new consolidated world of television, shows don't happen unless big station groups sign on to turn a syndication idea into a syndication reality. B&C will talk to the decision makers who decide a show is going to play at 4 p.m.—or 2 a.m.

SPECIAL REPORT: THE FOUNDATIONS OF SYNDICATION

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World Radio History

THE BUSINESS OF TELEVISION



BROADCASTING & CABLE

Great Picture

Continued from page 26
the sizzle in the steak. But the steak is digital TV."

While consumers are still largely confused when it

comes to figuring out HDTV, media planners and buyers are faced with the challenge of figuring out how many people are watching HD networks and, demographically, who is watching.

There are a growing number of networks airing programs in high-definition. Among them are all the broadcast networks and nearly two dozen cable networks like Discovery HD

Theater and NBC Universal's Bravo HD+, which last week rebranded itself Universal HD. The revamped network will air movies, sports and television shows like *Law & Order: SVU* and *Monk*.

Still, determining the demographics and size of the audience watching HD programs requires some guesswork.

For one thing, Nielsen Media Research doesn't yet release viewing figures for programs watched in high definition.

Not All Couch Potatoes...

"Nielsen doesn't measure a lot of things, which is a big problem for the future of television," says Tim Hanlon, senior vice president and director of emerging contacts at Starcom MediaVest Group. "The traditional advice [to advertisers] would be, 'Until it's Nielsen-rated, don't bother.'"

"The progressive answer is, 'Don't wait for Nielsen to divine how consumers are watching television; just open your eyes to penetration numbers and recognize where your audiences are.'"

Several research companies are conducting surveys to create a psychographic profile of the HDTV user. That wouldn't seem so hard if you think about it. "They're early adopters of technology products," says LRG's Leichtman.

But they're not necessarily couch potatoes. "It has more to do with getting new things than it does with [watching] more TV. People constantly try to link HDTV with digital video recorders, but they are not necessarily the same audience."

...But Usually Affluent

Moreover, the high cost of high-definition television sets—typically well above \$1,000—means most HDTV homes are on the affluent side, according to Aditya Kishore, senior analyst at the Yankee Group.

"It's not a handful of really rich people who have HD," he says. "But as for the majority of buyers, you're probably looking at a minimum \$75,000 household income."

The affluence of HD households makes them of particular interest to some advertisers, says Starcom's Hanlon.

"Today, the early adopters who can afford expensive sets are probably exceedingly attractive audiences for high-priced cars, TV sets or high-priced whatever," he says.

Although someday the whole nation will watch television in high-def, Hanlon says, "for programmers and advertisers right now, HDTV is a leap of faith." ■

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Multichannel NEWS

DECEMBER 6, 2004



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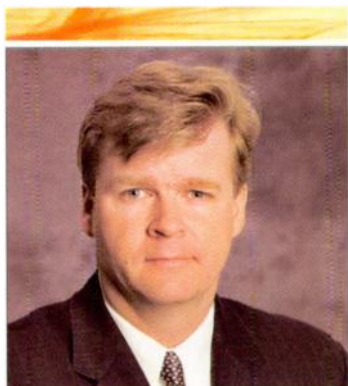
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Publisher's Note



Chuck Bolcom
Reed Television Group

One of the great pleasures of publishing magazines covering the media and entertainment business over a series of years is the ability to see how the industry evolves — how emerging technologies, talent and ideas can make revenue streams take such unexpected turns, widening or narrowing in ways that may not have even been imagined a decade ago. One of the great delights for us at *Multichannel News* and *Broadcasting & Cable* has been to watch the incredible momentum of the Hispanic television business.

We certainly knew that we were on to a great thing when we launched the Hispanic TV Summit last year, and when we created *Hispanic Television Update*, a newsletter dedicated to the business, a few months ago. But as we prepare for the second annual Summit, Dec. 6-8 at New York's Marriott Marquis, the need for a conference that examines all aspects of the Hispanic television business is beyond adjectives like "compelling."

Just take a look at our exclusive research on Hispanic channels targeting the U.S. marketplace, which begins on page 18A. All told, we have identified 75 networks targeting the

U.S. Hispanic marketplace — up from a list of 57 when we researched Hispanic programmers last spring.

Numbers for the last two years speak volumes. In 2003, 19 Latino program services launched in the States. This year, another 14 were added to the list. And we've already identified another five services launching in 2005 or beyond — including some with rather

gems in this supplement that should prove complementary to the topics that will be discussed by top executives during the Summit. But more than that, this publication was created with the idea of providing useful reference material in the future.

It would be an extraordinary understatement to say that the Latino TV business has come a long way since Univision first

“ We have identified 75 networks targeting the U.S. Hispanic marketplace — up from a list of 57 when we researched Hispanic programmers last spring. ”

unique genres, like El Garage TV, which will focus exclusively on automotive topics.

Those channels all have their sights on a growing number of multiple system operators that are creating special services for Latinos in a number of different ways. The variety of strategies they're implementing is detailed in an overview story, on page 8A. And we offer more granular information in another piece of exclusive research, beginning on page 9A, which gives a comprehensive analysis of the MSOs on a company-by-company basis.

Those are just a few of the

launched as the SIN broadcast network back in 1961 — or even since Galavision debuted in 1979. We look forward to chronicling the extraordinary changes that are likely to occur in the coming months and years as media companies continue to respond to this vibrant and multifaceted segment of the consumer market.

Chuck Bolcom

Chuck Bolcom
Group Publisher
Reed Television Group

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Research: The Multifaceted Market.....	1A
Content: Local Programming Growth.....	4A
Marketing: Campaigns that Pop.....	5A
Distribution: The Power of Tiers	8A

Exclusive Data:

MSO Offerings.....	10A
Latino Channels	18A
TV Station Groups	24A

Culture of a Million Facets

RESEARCH IS SHEDDING NEW INSIGHTS INTO THE MANY ASPECTS OF LATINO CONSUMERS

BY JEAN BERGANTINI GRILLO

Meeet the “Goddess,” a luscious, tawny-skinned young female. Though only a mannequin, at size 8, her curvaceous form is sending shock waves across retail display windows from Los Angeles to Manhattan. The “Goddess” is two and a half inches more mannequin than the traditional size 2/4 and her arrival, the fashion press notes, celebrates J.Lo more than Twiggy.

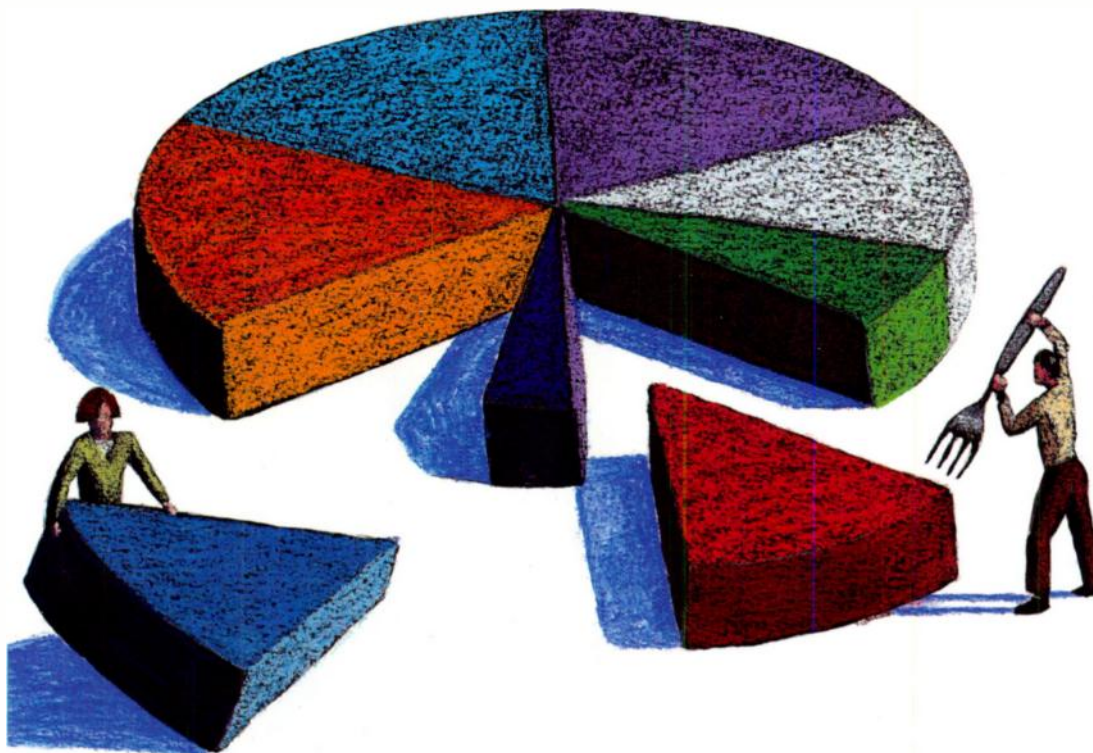
America is not just growing more Hispanic, we’re flaunting it.

But recent research data on Hispanic households goes beyond such fashion phenomena, broadening the advertising and marketing community’s knowledge base about this cultural segment in sometimes surprising ways. In fact, if there’s one noticeable trend regarding Hispanic consumer buying habits it’s that Hispanic households are now all over the demographic map.

“One way we try to help our clients understand the Hispanic household is to explain they represent very different subgroups,” says Pedro Blanco, president of the Blanco Lorenz advertising agency. “You have households that are young; households that are old. They can be poor; they can be wealthy. What is very powerful is that all of them share certain psycho-social themes.”

According to Blanco, four key “beliefs” unite Hispanic households: acceptance that they are living between two cultures; that the generation gaps that exist are vivid; that American assimilation — even when hotly pursued — doesn’t necessarily mean letting go of one’s Latino roots; and, family trumps all.

It’s also clear that significant numbers of Hispanic consumers are more highly paid, better-educated and bigger spenders than some would believe. Ac-



ording to a recent Media Audit survey of Hispanic households that go online, a majority have incomes above \$50,000 (in fact, 14% make \$100,000 or more). Over three-fourths of these consumers use an ATM card; 62% spend over \$100 a week on food purchases; and four-times as many plan to buy a luxury car than mainstream

are still marketing opportunities among foreign travelers, mortgage and insurance buyers, and credit card owners, groups where Hispanics generally underindex.

According to recent Synovate data, the salient characteristics of the Hispanic market mirror those of the “ideal” consumer: they are young

is directly affecting home purchases.

“According to Fannie Mae, 50% of all first-time home buyers are Hispanic,” says Joe Schramm, president of Schramm Sports & Entertainment, “which is why Sears [Roebuck & Co.], Ikea [International A/S], Loews [Corp.] and Home Depot [Inc.] are currently running special cam-



“According to Fannie Mae, 50% of all first-time home buyers are Hispanic, which is why Sears, Ikea, Loews and Home Depot are currently running special campaigns targeting Latinos.”

JOE SCHRAMM

Schramm Sports & Entertainment

“Hispanics turn over their cell phones constantly; they overindex on speaker phones and other gadgets. Hispanics, with its youth and large families, are the next big thing.”

PEDRO BLANCO, Blanco Lorenz

Americans who go online. Media Audit based its findings on the answers of Hispanic respondents who accessed the Internet at least once over the last 12 months.

In Media Audit’s Hispanic National Report, 52.5% of Hispanics surveyed in 81 markets are financial optimists; nearly 60% recently shopped for clothes; and over 69% own at least one personal computer. But the results show that there

(25.4 median age); boast families with children (3.5 people per household); and represent a large population (43 million plus). And they are quality conscious but brand loyal with over \$575 billion in annual buying power. Most important, Hispanic households are growing: currently one out of seven Americans is Hispanic. By 2050, they will represent one out of three.

Not surprisingly, this growth

paings targeting Latinos.”

Schramm also cites data from the 2003 Multicultural Report showing food shopping among Hispanics is a cultural event. “Nearly 50% shop once a week; 27% shop two or three times a week; and 35% use coupons,” he says. “They shop frequently; they spend a lot of money; they go with their families. It’s a social experience, and it’s a great place to reach them.”

See **RESEARCH**, page 16A

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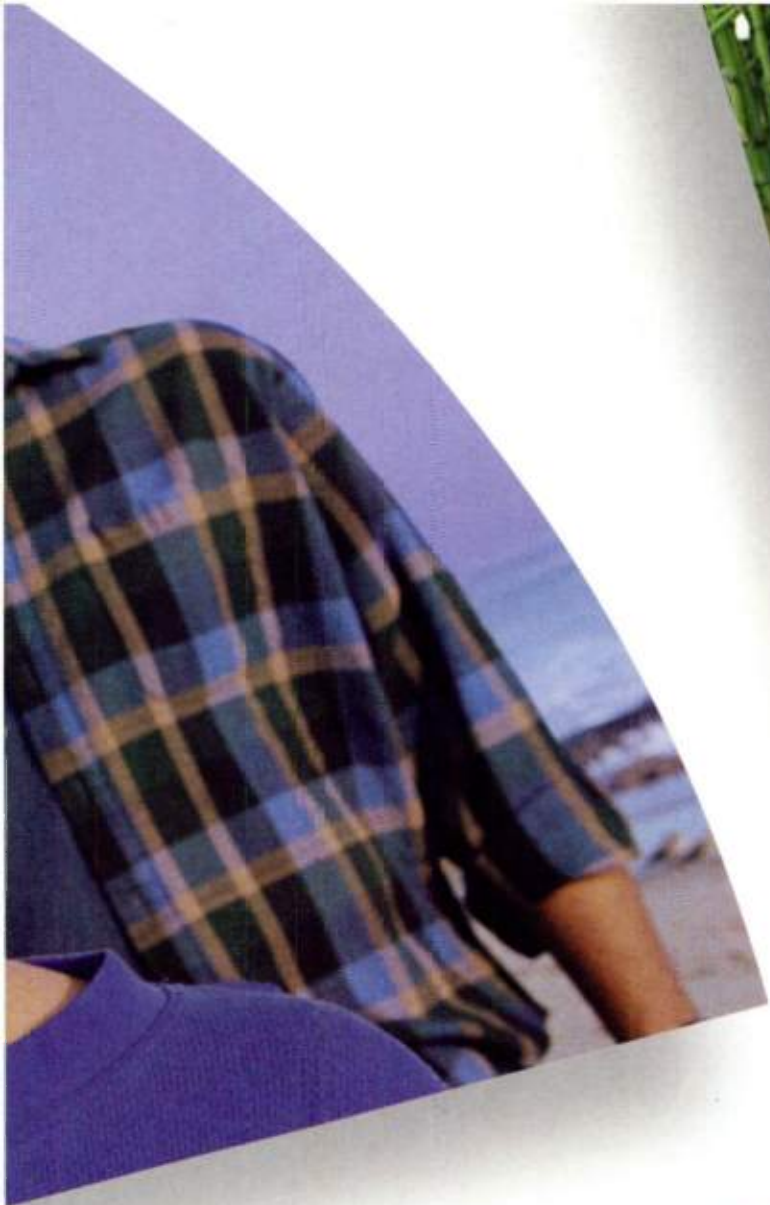
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Local TV, the Latino Way

PROGRAMMING FOCUSED ON HISPANIC LOCAL INTERESTS IS ON THE RISE

BY ALAN BREZNICK

Pennsylvania's Pocono Mountains may not seem like fertile ground for a homegrown Hispanic TV show. But in tiny Hazleton, Pa., a local TV production company has teamed up with the town's cable operator to create a weekly 20-minute newscast for Latino viewers, anchored by a local Latino newspaper publisher.

"The demographics of our area are changing," says Tim Trently, division manager of local operator Service Electric Cable TV Inc., which has 20,000 basic cable subscribers.

Trently notes that about 5,000 Hispanics have migrated to Hazleton from neighboring New York and New Jersey, but few have signed up for cable — at least partly because satellite providers offer more attractive Spanish-language programming packages. "We want to make sure there's programming out there for everybody," says Trently. "We're doing everything we can to promote it."

Service Electric is far from the only operator that's heeding the drumbeat as Latin rhythms of life grow more prominent both in major urban markets and along some unexpected byways.

Local Latino programming may not be growing at the same explosive rate as national Hispanic channels — which jumped from about 60 last spring to 75 today, according to *Multichannel News* research published in this supplement (see page 18A).

Yet in a slow, steady trickle, cable operators, broadcasters and satellite TV providers have started introducing an increasing variety of local Spanish-language channels and shows. Local Hispanic channels have popped up in New York; Los Angeles; Phoenix; Austin, Texas; Milwaukee; and Tampa, Fla., among other places, over



Bay News 9 vice president and general manager Elliot Wiser expanded the network's Spanish-language channel over the past year.



Time Warner Cable's NY1 Noticias features the anchor team of (l. to r.) Adhemar Montagne, Juan Manuel Benitez, Adriana Hauser and Philip Klint.

“We want to make sure there's programming out there for everybody. We're doing everything we can to promote it.”

TIM TRENTLY, Service Electric Cable TV

the last couple of years.

Prominent among them is Time Warner Cable's NY1 Noticias, a Spanish-language companion to its popular NY1 News news channel. The New York City service launched in June 2003 and is primed for new changes. "The plan obviously is to expand the programming," says Steve Paulus, senior vice president and general manager of the entire NY1 operation for Time Warner.

With New York facing what's likely to be a hotly contested mayoral election next year, the network's plans call for adding a political talk show, sports programs and more live-event coverage next year.

Right now, NY1 Noticias is a shoestring operation with a handful of reporters covering news of particular interest to the Latino community, which makes up 27% of the city's population. The channel offers viewers a constantly updated 30-minute news wheel, weather forecasts, transit and

traffic reports, and occasional coverage of live, breaking news events.

In Tampa, Bay News 9 en Español, another Spanish-language all-news channel, is also in prime expansion mode. Started in March 2002 as a complement to the Bay News 9 channel, the network upgraded from a 15-minute news wheel to a 30-minute news wheel last spring and added regular segments on medicine and business. It also boosted its political coverage during this year's heated campaign season that saw Florida elect one of the nation's first Hispanic senators, Cuban-born Mel Martinez.

"It's been an exciting year," says Elliot Wiser, vice president and general manager of the entire Bay News 9 operation for MSO Bright House Networks. Wiser says Bay News 9 en Español ran several interviews with Martinez during the election and just earned its first Emmy Award nomination for a series about Cuba.

News isn't the only genre that's inspired local Latino programming. Cable operators, broadcasters and satellite TV providers are also developing and distributing local weather, music, general entertainment, public affairs, and sports channels and shows.

In Los Angeles, privately owned broadcaster LATV now produces and airs 20 hours of original Hispanic music, culture and other entertainment programming each week, up from just four hours a year ago. Geared toward bilingual Latino youth and young adults, the three-year-old network reaches 4.4 million homes in southern California through its broadcast station, KJLA-TV, and carriage on area cable systems. While grown locally in Los Angeles, LATV now has national aspirations. It has inked carriage deals with DirecTV Inc. and EchoStar Communications Corp.'s Dish Network, and has begun selling

See **LOCAL TV**, page 16A

Campaigns That Pop

NBC, COX AND HISTORY OFFER HISPANIC MARKETING CAMPAIGNS THAT SIZZLE



NBC Universal's "Mas" campaign was launched to support operators' efforts to drive penetration in Hispanic markets.

BY JEAN BERGANTINI GRILLO

Mas is Spanish for "more." It's also the name of a NBC Universal Cable marketing campaign — and the new mantra for a host of other cable marketers who know an opportunity when they see one.

With around 75 networks and several MSOs now targeting Hispanic consumers, it was only a matter of time before a critical mass of cable marketing campaigns emerged with Latinos in their sights. They've been fueled not only by the primal need to make waves in a competitive landscape, but research that speaks to the growth curve that could lie ahead for any cable company that successfully attracts Latinos.

According to Horowitz Associates Inc.'s Focus Latino IV data, while 70% of non-Hispanic households subscribe to cable, only 57% of urban Hispanics do. And the numbers are even worse for Spanish-dominant households (48%). Indeed, while English-speaking Hispanics overindex for cable,

bilingual and Spanish-dominant Latinos overindex on satellite penetration.

Not so coincidentally, NBC Universal Cable's "Mas" campaign was launched in September 2003 to support operators in their efforts to drive penetration in key Hispanic growth

now-well-known fact that direct-broadcast satellite firms targeted Hispanics much earlier and more effectively than cable. "Satellite offered Hispanic households a \$24.99 price point where they could go straight to Spanish-language programming," Pinto recalls. "In ca-

“We are addressing the needs of the Hispanic community, their acculturation and the interest in understanding their culture.”

MIKE MOHAMAD, *The History Channel*

markets. Reinforcing Telemundo and mun2 as brands was a secondary, though significant, aspect.

"What NBC wanted was to complement what their MSO clients were already doing," says Pedro Blanco, president of ad agency Blanco Lorenz, which created the "Mas" campaign. "But I tip my hat to NBC. They wanted to grow cable, not just NBC programming."

Lynette Pinto, vice president of marketing for NBC Universal Cable Networks, says the company was motivated by the

America. But his kids have their world, and the grandparents still want to hold on to another. "It's actually not that hard to give everyone what they need," the spot says. "Cable gives us more — more channels, perfect picture quality, and more choices for the whole family." That's why, Ernesto says, "*Quiero Mas. Quiero cable.*" — "I want more. I want cable."

In other vignettes, Jorge and his sister have similar revelations regarding high-speed Internet access while Marta and her extended family delight in cable's large monthly movie fare. Radio spots, print ads and direct-mail components also were included.

In the end, five MSOs and 25 cable systems representing over 300 headends ran the "Mas" campaign. They include Comcast Corp., Cox Communications Inc., Adelphia Communications Corp. and Time Warner Cable. Says Pinto: "We know it's a successful campaign because it got used."

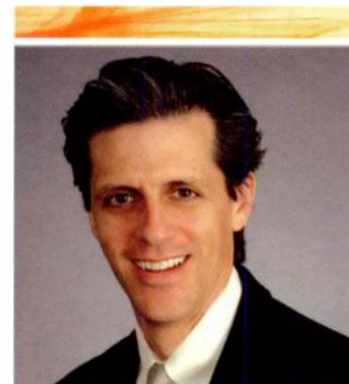
"Hispanic TV has mainly been broadcast," Blanco adds in discussing the fine points of the six-figure NBC Universal campaign. "Telemundo is a brand that has had permission to speak to Hispanic households for over 15 years. Now it acts as a matchmaker tying Telemundo to Time Warner. Or mun2 to Comcast, marrying over-the-air viewers to cable."

NBC's campaign won first-place honors in the 2004 Excellence in Multicultural Marketing Awards, given out by the Cable & Telecommunications Association for Marketing. Cox's Arizona unit garnered the same honor for a Hispanic campaign with a decidedly local approach.

COX'S ARIZONA CAMPAIGN

Tony Maldonado, vice president of marketing at Cox Arizona, says it's not so much a campaign as a new state of mind about marketing. "It's a holistic effort on the best way to do business with Hispanics," he

See **MARKETING**, page 16A



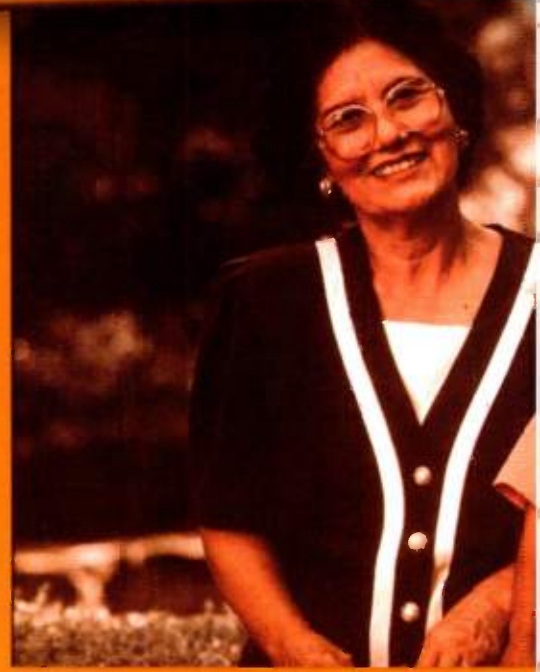
"What's important is you can't offer a great video service and weak customer service."

TONY MALDONADO
Cox

HITN-TV

Produced in America

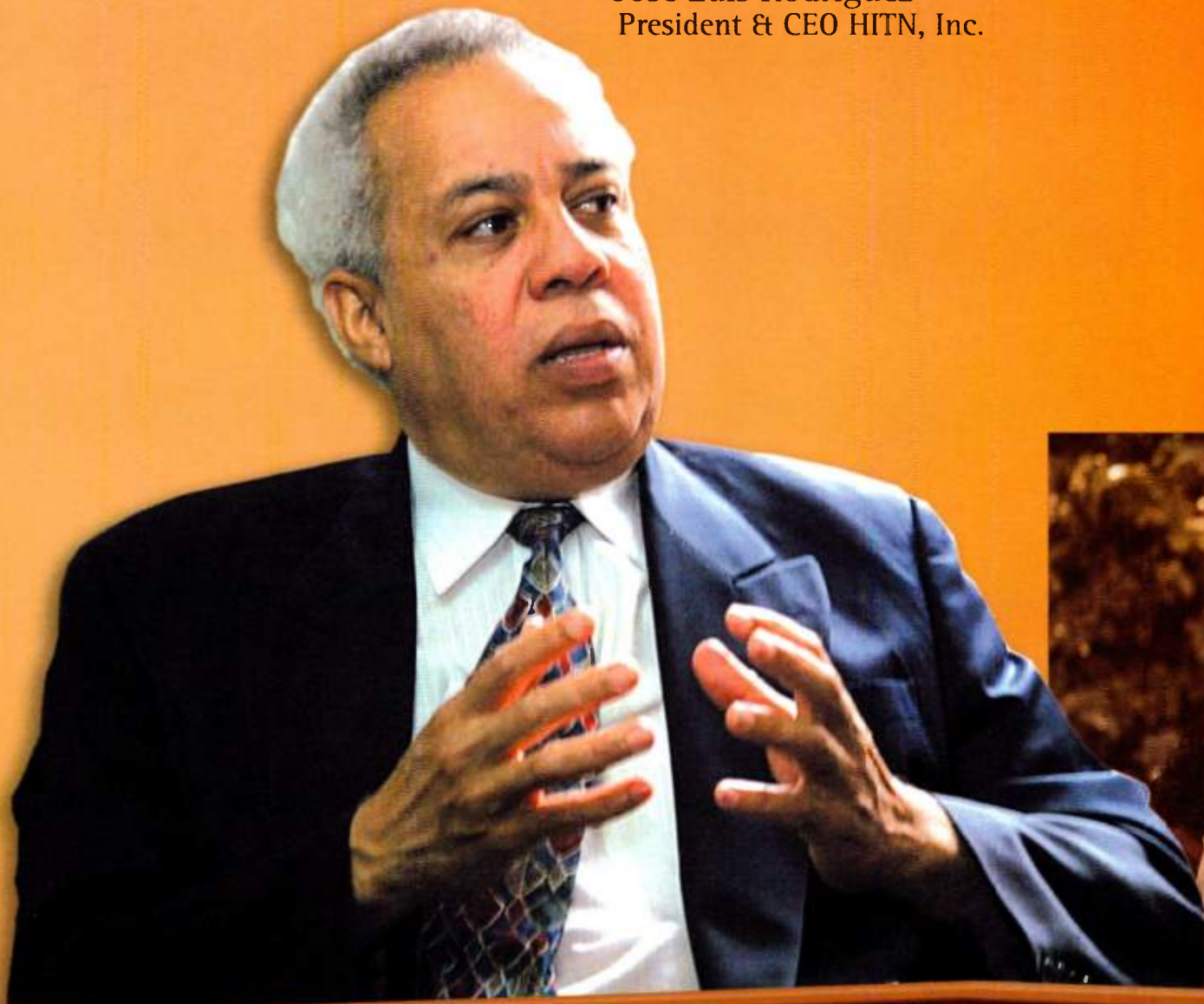
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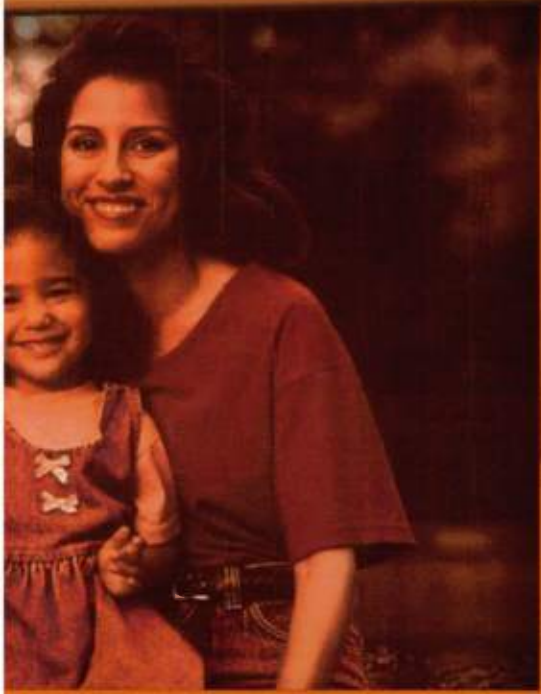


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- José Luis Rodríguez
President & CEO HITN, Inc.





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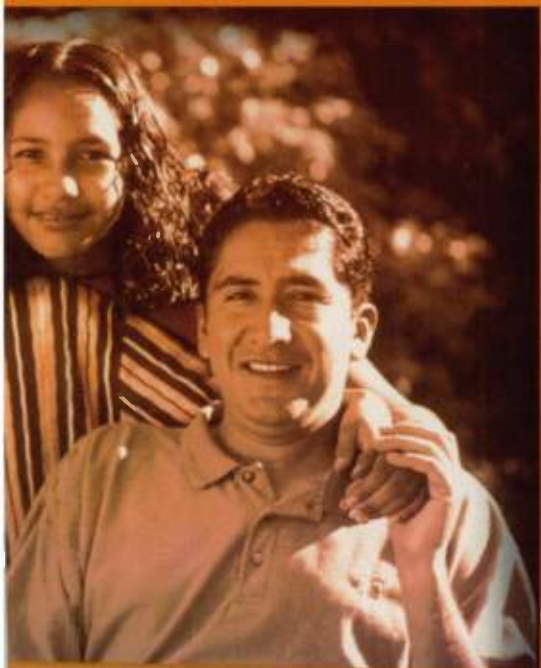
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The Power of Tiers

OPERATORS ARE USING A VARIETY OF STRATEGIES TO LURE A WIDER BASE OF LATINO SUBSCRIBERS

BY GEORGE WINSLOW

In August, the fifth anniversary of EchoStar Communications Corp.'s Dish Latino package passed without even a press release from the company's usually prolific public relations department. But the revolution in multichannel programming for Hispanics that Dish Latino helped launch in 1999 continues to reverberate through the cable and satellite industry.

Over the last 18 months, the popularity of the Dish Latino package in the Hispanic community helped convince at least four major MSOs — Comcast Corp., Cox Communications Inc., Charter Communications Inc. and Insight Communications Co. — to radically revamp their Hispanic packages.

"All the MSOs are revising their strategies," notes Starrett Berry, a consultant for channel LATV. "Comcast was the first, [launching new Hispanic tiers in May of 2003]. But they all understand [that the old practice of] making customers buy expensive digital packages before reaching Spanish-language programming is not a competitive strategy."

Satellite's competitive advantage can be seen in a couple of numbers. While EchoStar and DirecTV Inc. don't provide subscriber counts for their Hispanic tiers, observers estimate that EchoStar is the clear leader with over 800,000 subscribers, followed by DirecTV with about 500,000. The cable operators have much smaller figures, the programmers say.

To improve its competitive position, DirecTV has aggressively added more programming to its Para Todos packages, and beefed up its marketing efforts in the last year, says Stephanie Campbell, executive vice president of programming.

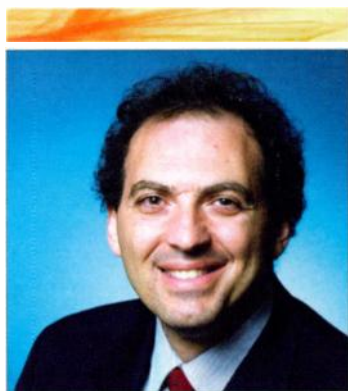
"I think we still have a much broader offering than cable," she says. Because DirecTV is a

national service, Campbell says that it's possible for the service to add networks that local operators with relatively small Hispanic communities and limited

bandwidth might find hard to justify financially.

Some of the cable offerings, however, are beginning to close the gap on pricing and

programming. Comcast, which has been the most aggressive of all the operators in targeting the Hispanic community, re-
See **DISTRIBUTION**, page 14A



Comcast's Spanish-language VOD package "will give us a clear edge over satellite."

MAURO PANZERA
Comcast



Independent Film Channel's World Picks Latino On Demand offers 20 hours of Spanish-language programming, like *El Caballero Don Quijote*, every month.

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World Radio History

Hispanic Strategies of Top U.S. Operators

The following listing ranks cable and satellite distributors according to their basic-subscriber universes, and provides a glimpse of their present and future plans to serve the Hispanic community. It was compiled by Multichannel News contributing correspondent George Winslow, based on information supplied by the operators.

COMCAST CORP.

BASIC SUBSCRIBERS: 21.5 million
DIGITAL SUBSCRIBERS: 8 million
HIGH-SPEED INTERNET: 6 million
CONTACTS: David Jensen, vice president of international programming; Mauro Panzera, senior director of multicultural marketing, (215) 665-1700.

HISPANIC PROGRAMMING

PACKAGES: Cable Latino (16 to 22 Spanish-language channels, limited basic channels, digital set-top box and, where available, video on demand for \$20 to \$25); Cable Latino Completo (an additional 60 to 80 English-language channels from the expanded basic tier for about \$49) and Cable Selecto (allows existing customers to upgrade to the Hispanic programming package for \$5 to \$15). Corporate has signed deals with 40-plus programmers; local systems customize lineups.

SPANISH VOD, HSD AND BUNDLES: Offers over 100 hours of free Spanish-language VOD. Works with Planeta to provide Spanish-language Web site for high-speed data subscribers. Currently, no discounted bundles for Hispanic subscribers.

MAJOR HISPANIC MARKETS: Comcast passes about 32% of all U.S. Hispanic homes. Major Hispanic markets include Los Angeles; Miami; Dallas; northern New Jersey; San Francisco; Albuquerque, N.M.; and Chicago.

RECENT AND FUTURE MOVES: After rolling out lower-cost Hispanic tiers in 2003, the company continued to revamp offerings in 2004, launching a Spanish Web site for its high-speed portal with Planeta in January and announcing plans to simplify Hispanic tiers and to expand its free VOD offerings to over 100 hours in October. Local systems, which take 10 basic Spanish services and then customize the lineup with an additional six to 12 networks, will be revamping their lineup in the next few months. As the company rolls out voice-over-Internet protocol telephony, bundles featuring long-distance packages for Hispanics could be in the works.

DIRECTV INC.

SUBSCRIBERS: 13.5 million
CONTACT: Stephanie Campbell, executive vice president of programming, (310) 535-5000
HISPANIC PROGRAM PACKAGES: Para Todos includes four tiers: Opción Especial (more than 75 channels, including 25 Spanish-language networks and seven Spanish-language music channels for \$26.99 a month); Opción Extra Especial (more than 125 channels, including 32 Spanish channels for \$33.99 a month); Opción Ultra Especial (an additional 17 English channels and one Spanish network for \$37.99 a month) and Opción Premier (adds 30 premium channels, including HBO Latino and a sports package of over 25 networks priced at \$85.99 a month). Where available, local broadcast stations cost an additional \$3.

MAJOR MARKETS: National platform, but offers local Hispanic broadcast stations in many major markets such as Los Angeles, where six Spanish-language stations are included in the local broadcast offering of 26 stations.
RECENT AND FUTURE MOVES: Challenging Echostar Communications Corp.'s lead by boosting marketing efforts and increasing Hispanic program offerings, adding five new Spanish-language channels in the last year. Always looking for more programming. Management is bullish on the overall prospects of near VOD with rollout plans in the next year. Para Todos could get a NVOD component.

TIME WARNER CABLE

BASIC SUBSCRIBERS: 10.9 million
DIGITAL SUBSCRIBERS: 4.7 million
HIGH-SPEED INTERNET: 3.7 million
CONTACT: Maida Chicon, director of multicultural marketing, (203) 351-2275, maida.chicon@twcable.com
HISPANIC PROGRAMMING PACKAGES: The DTValue Package and DTV en Español features offerings and pricing that vary on a per-system basis. In New York it costs \$52.95 and includes more than 250 channels, including a number of Spanish broadcast stations and more than 20 Spanish-language cable networks, 46 channels of digital music of which five are in Spanish, and a digital box and remote that gives access to movies on demand and other services. In New York, Time Warner also offers an introductory, streamlined DTV en Español package that runs as low



De Película Clásico, with classic Mexican films like *Diosa Arrodillada*, is carried on Dish Network's Latino tiers.

as \$27.95.

SPANISH VOD, HSD AND BUNDLES: Some Spanish-language movies are available on MSO's pay VOD platform. Both Roadrunner and AOL's broadband service have Spanish pages.

MAJOR HISPANIC MARKETS: Include New York, New Jersey, San Diego, Texas and North Carolina, to name a few.

RECENT AND FUTURE MOVES: The New York City system rolled out a DTV en Español package in early 2003 and a number of other systems have followed, with their own customized versions. The company recently hired a director of multicultural marketing, and the MSO is now revamping its offerings, both for linear channels and VOD. The creation of a lower-cost tier that doesn't require customers to buy up through the digital tiers is likely. VOD will also be a very important part of its Hispanic strategy, but the MSO wants to generate revenues from the product and may offer only limited free VOD. The rollout of telephony could also provide opportunities to bundle video with low-cost long-distance services for Hispanics. Also expect marketing campaigns targeted to specific groups within the Hispanic community, building on some of the successes local systems have already seen with that strategy.

ECHOSTAR COMMUNICATIONS CORP.

BASIC SUBSCRIBERS: 10.4 million
CONTACTS: Julie Popp, spokeswoman, (303) 723-2023

HISPANIC PROGRAMMING PACKAGES: Dish Latino (an all-Spanish-language option with 25 networks and six music channels priced at \$24.95); Dish Latino Dos (31 Spanish-language channels plus over 150 English-language channels for \$34.99 per month); and Dish Latino Max (31 Spanish channels, plus over 195 English networks for \$44.95). Local broadcast stations cost an additional \$4 where available.

MAJOR HISPANIC MARKETS: National footprint but offers local broadcast stations in over 151 markets reaching about 93% of all TV households.

RECENT AND FUTURE MOVES: The market leader is fighting off increased competition by aggressively marketing its large and relatively low-cost package.

COX COMMUNICATIONS INC.

BASIC SUBSCRIBERS: 6.3 million
DIGITAL SUBSCRIBERS: 2.4 million
HIGH-SPEED INTERNET: 2.4 million
PHONE SUBSCRIBERS: 1.2 million
CONTACT: Cesar Cruz, director of multicultural marketing, (404) 843-5000
HISPANIC PROGRAM PACKAGES: Paquete Latino (up to 35

Spanish-language networks and 10 to 15 channels English-language local broadcast stations and basic services for about \$35). Designed so local systems can customize the lineup and pricing.

HISPANIC VOD, HSD AND BUNDLES: No free VOD. Bundles phone and video in some markets, offering free long-distance minutes to Mexico. No Spanish-language Web site.
MAJOR MARKETS: Arizona, Central Florida, Las Vegas, Southern California and West Texas, among others.

RECENT AND FUTURE MOVES: As part of a completely revamped Hispanic strategy, Cox launched the Paquete Latino package in September. It's now available in San Diego; Phoenix and Tucson, Ariz.; Northern Virginia; Eureka, Santa Barbara and Bakersfield, Calif.; New Orleans; Oklahoma City; and Wichita and Topeka, Kan., with more to follow. Bundles of telephony, high-speed data and video are planned for late first quarter or early second quarter 2005, with emphasis on expanding Latino-focused phone packages. Spanish-language Web site and VOD products likely in mid-2005, but VOD offerings will not be free.

CHARTER COMMUNICATIONS INC.

BASIC SUBSCRIBERS: 6.1 million
DIGITAL SUBSCRIBERS: 2.7 million
HIGH-SPEED INTERNET: 1.8 million

Interior Design

Lifestyle

Cooking

Gardening

Feng Shui

Arts and Crafts

Do it Yourself

Home Improvement

"Do you know... what is the key ingredient for a **Great Mexican Recipe?"**"



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Hispanic Strategies of Top U.S. Operators



Blanca Martinez, hostess of *Furla Musical* on music network Bandamax, which markets itself to U.S. operators.

PHONE SUBSCRIBERS: 40,200

CONTACT: Tim Kelly, director of marketing, core video, (314) 965-0555

HISPANIC PROGRAMMING

PACKAGES: Charter Latino (local broadcast channels and eight to 10 Spanish-language networks, increasing soon to 15 to 20 Spanish-language channels with free Spanish VOD, for \$24.99)

HISPANIC VOD, HSD AND BUNDLES:

No free Spanish-language VOD or Spanish-language Web site at press time but free VOD is a key component of the company's Hispanic strategy, and Charter Latino tier will soon include 100 hours of free VOD content. The MSO is testing a bundle of Charter Latino and a 384K high speed data service for \$54.98. **MAJOR HISPANIC MARKETS:** Include Los Angeles; Charleston, S.C.; and Ft. Worth, Texas.

RECENT AND FUTURE PLANS: In August, began the soft launch of a low-cost tier even though all the programming deals hadn't been signed. Executives are now in the

process of beefing up programming and VOD offering, a process expected to be completed by early 2005, when larger markets should have about 20 Spanish-language channels and smaller ones about 15. Is considering a Spanish-language Web site and as company rolls out telephony in 2005, bundling video and long distance phone plans for Hispanics could be an option.

ADELPHIA COMMUNICATIONS CORP.

BASIC SUBSCRIBERS: 5.3 million

DIGITAL SUBSCRIBERS: 2 million

HIGH-SPEED INTERNET: 1.3 million

CONTACT: Judy Meyka, senior vice president of programming, (303) 268-6300.

HISPANIC PROGRAMMING

PACKAGES: Adelfia en Español is available in Southern California with three tiers: Basico (12 Spanish-language service and the broadcast basic services of 32 must carry broadcast stations,

including 10 to 12 Spanish stations, for \$25.95 or \$5.95 as an add-on to a digital package); Especial (\$4 for eight networks and eight music channels) and Ultimate (\$8.95, a \$1 discount for all 20 networks and 8 music channels)

HISPANIC VOD, HSD AND BUNDLES:

Some Spanish-language VOD is currently available, but there is no Spanish-language Web site for data customers and no bundles specifically targeted to Hispanics.

MAJOR HISPANIC MARKETS:

Southern California as well as fast growing Hispanic markets in the Southeastern U.S.

RECENT AND FUTURE MOVES:

Systems in other parts of the country, particularly the Southeast Division, are actively exploring the possibility of rolling out Adelfia en Español packages, which is currently available in Southern California and Florida. In California, the systems are planning to beef up VOD offerings in the months ahead and are actively exploring the possibility of creating a Spanish-language Web site. Bundling phone and video services are also in the game plan when the system rolls out telephony in 2005.

CABLEVISION SYSTEMS CORP.

BASIC SUBSCRIBERS: 3 million

DIGITAL SUBSCRIBERS: 1.3 million

HIGH-SPEED INTERNET: 1.3 million

PHONE SUBSCRIBERS: 189,191

CONTACTS: Matthew Weiss, vice president of digital product strategy, (516) 803-2300

HISPANIC PROGRAMMING

PACKAGES: iO en español (30 Spanish-language programming services, 20 hours of free Spanish-language on demand programming, the Telemundo, Univision and TeleFutura Spanish-language local broadcast channels and the broadcast basic tier). Digital customers at the Family level can add iO en español tier for \$4.95, and customers at the broadcast basic level pay an additional \$14.95 per month.

HISPANIC VOD, HSD AND BUNDLES:

Rainbow Media's World Picks Latino On Demand service offers 20 hours of VOD programming a month, with 25% refreshed weekly. In July 2003, Cablevision partnered with Planeta Networks to launch a Spanish-language Web portal for its Optimum Online data service. Has a wide variety of bundles for video, data and phone but does not offer bundles specifically targeted to Hispanic customers.

MAJOR HISPANIC MARKETS: The company serves areas of the Bronx, Brooklyn and Long Island in New York, and Hudson County in New Jersey, which all have large Hispanic communities.

RECENT AND FUTURE PLANS:

The Hispanic packages are currently available in the Bronx, Brooklyn, and Newark, N.J., and Hudson County service areas. No date has yet been set for the rollout of the Hispanic tier into the other service areas of Long Island.

BRIGHT HOUSE NETWORKS

BASIC SUBSCRIBERS: Over 2.1 million

DIGITAL SUBSCRIBERS: 882,000

HIGH-SPEED INTERNET: 722,000

CONTACTS: Steve Stiger, group vice president of marketing, (407) 210-3156

HISPANIC PROGRAMMING PACKAGES:

Nuestros Canales (tier of seven Spanish-language channels cost \$2.99 on top of the digital package of over 300 channels, which is generally priced at around \$56)

HISPANIC VOD, HSD AND BUNDLES:

VOD services are widely available in the company's franchises, and offering includes some Spanish-language VOD in the pay section. The Road Runner data service has Spanish-language pages for Hispanic customers. The company currently has no bundles specifically targeted to Hispanics.

MAJOR HISPANIC MARKETS: The Florida footprint for Bright House Networks, which is the MSO's largest cluster, serves a number of large Hispanic communities.

RECENT AND FUTURE MOVES: The company launched a digital Hispanic tier in October 2003 and is currently reviewing its programming, pricing and bundles. No specifics yet, but look to see more programming that better targets the diversity of the Hispanic community.

MEDIACOM COMMUNICATIONS CORP.

BASIC SUBSCRIBERS: 1.5 million

DIGITAL SUBSCRIBERS: 382,000

HIGH-SPEED INTERNET: 350,000

CONTACTS: Italia Commisso Weinand, senior vice president of programming and human resources, (845) 695-2600

HISPANIC PROGRAMMING

PACKAGES: Canales (includes nine Spanish-language channels and is available on the majority of systems that have been upgraded to digital). Customers must pay for analog

package (which generally includes some Hispanic broadcasters) and the digital box in addition to the Canales tier. Company refused to provide price information on any of these products.

SPANISH VOD, HSD AND BUNDLES:

The MSO offers no Spanish-language VOD, does not have a Spanish-language Web site or offer bundles particularly targeted to Hispanics.

MAJOR HISPANIC MARKETS: Its biggest Hispanic market is in Nogales, Ariz. Most of the company's systems serve relatively small Hispanic communities.

RECENT AND FUTURE MOVES:

Has plans to aggressively target the entire ethnic population and as part of that will add Spanish-language programming. Also working on Spanish-language VOD and Web site.

INSIGHT COMMUNICATIONS CO.

BASIC SUBSCRIBERS: 1.3 million

DIGITAL SUBSCRIBERS: 439,400

HIGH-SPEED INTERNET: 311,500

PHONE SUBSCRIBERS: 62,800

CONTACTS: Pam Euler Halling, senior vice president for marketing and programming, (917) 286-2300

HISPANIC PROGRAMMING

PACKAGES: Insight Para Tí (24 channels, including five English and 19 Spanish as well as the basic broadcast channels, is priced at \$29.95)

HISPANIC VOD, HSD AND BUNDLES:

Para Tí gives customers a digital box that allows them access to VOD and an interactive programming guide. The company does not offer any specific Spanish VOD offerings, a Spanish Web site for its data customers, or bundles exclusively targeted to Hispanics.

MAJOR HISPANIC MARKETS: Serves some fast growing Hispanic markets, such as Lexington Ky., but generally operates in communities with relatively small Hispanic populations.

RECENT AND FUTURE MOVES:

Launched Insight Para Tí package last summer and is now concentrating on marketing it.

CABLE ONE INC.

BASIC SUBSCRIBERS: 712,800

DIGITAL SUBSCRIBERS: 220,500

HIGH-SPEED INTERNET: 165,600

CONTACTS: Jerry McKenna, vice president of strategic marketing, (602) 364-6000

HISPANIC PROGRAMMING

PACKAGES: Digital Español (10 Spanish-language networks and the basic-cable tier, which includes local broadcasters, for \$41.99 in about 98% of its systems)

Telemundo is America's fastest-growing Hispanic network, reaching 91% of U.S. Hispanic viewers with 15 O&Os, 32 broadcast and 450 cable affiliates.



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HISPANIC VOD, HSD AND BUNDLES:

The company does not have a Spanish-language Web site for HSD customers, specific VOD services for Hispanics, or bundles that are specifically targeted to Hispanics.

MAJOR HISPANIC MARKETS: The MSO tends to serve small and mid-sized markets that do not have large Hispanic communities.

RECENT AND FUTURE MOVES: Would like to add more Hispanic programming, but has been disappointed with what is available.

CEBRIDGE COMMUNICATIONS

BASIC SUBSCRIBERS: Over 460,000

CONTACTS: Patty McCaskill, senior vice president of programming and marketing, (314) 965-2020

HISPANIC PROGRAMMING

PACKAGES: La Conexión Español (10 Spanish-language channels, costs \$3.99)

Customers must also lease a digital box for \$3.99 and get the expanded basic tier,

costing \$37 to \$40, putting total monthly cost at about \$45 to \$48.

Some special promotions for customers willing to sign a year-long contract and provide a credit card reduce expanded basic cost to \$29.95 for a total cost of under \$38.

SPANISH VOD, HSD AND BUNDLES: No Spanish VOD, Spanish Web site for Internet customers and no bundles specifically targeted to Hispanics.

MAJOR HISPANIC MARKETS: Owns a number of Texas systems.

RECENT AND FUTURE MOVES: The Latino tier is primarily marketed in their Texas systems. No word on when it will roll it out to other systems.

RCN CORP.

BASIC SUBSCRIBERS: 370,187 (as of 2003)

HIGH-SPEED INTERNET: 174,898

(as of 2003)

PHONE SUBSCRIBERS: 246,711 (as of 2003)

CONTACTS: John Murawski, director of video programming, (609) 734-3700.

HISPANIC PROGRAMMING

PACKAGES: Canal N Digital Vision (\$9.95 to \$11.95 for 10 to 15 Spanish-language networks and up to seven music services). Customers must, however, subscribe to basic cable, about \$42.95, and get a digital box, around \$4.95, for a monthly cost of least \$56.85 a month.

SPANISH VOD, HSD AND BUNDLES:

World Picks Latino On Demand service available in New York; Lehigh Valley, Pa.; San Francisco; and Washington, D.C. No Spanish-language Web site for data customers. Video offerings can be bundled with a Hispanic International Plan that offers low-cost long distance rates to a number of Latin American countries.

MAJOR HISPANIC MARKETS INCLUDE: New York, Los Angeles, Chicago and New Jersey.

RECENT AND FUTURE MOVES: RCN has recently added the Spanish-language VOD in several markets and has rolled out a Hispanic video tier in Los Angeles; San Francisco; Washington; Lehigh Valley; Queens, N.Y.; and Chicago. Evaluating the need for additional programming and Spanish-language Web sites for high-speed and phone customers.

BRESNAN COMMUNICATIONS

BASIC SUBSCRIBERS: 297,000

DIGITAL SUBSCRIBERS: 100,000

HIGH-SPEED INTERNET: 57,000

CONTACTS: Jim Gemmill, vice president of operations, (914) 641-3300

HISPANIC PROGRAMMING: Digital Economico (Hits en Español, which includes 10 Spanish-language channels and seven music channels, plus local broadcasters, a digital box and

access to pay per view for about \$22); Digital Classico (adds 39 to 40 channels from expanded basic) Markets with significant Hispanic populations generally carry such broadcasters as Univision and Telemundo.

SPANISH VOD, HSD AND BUNDLES: Currently offers no Spanish VOD, Spanish Web site or bundles specifically targeted to Hispanics.

RECENT AND FUTURE MOVES: Has been concentrating on the massive upgrade of its systems, but now is paying more attention to programming. Considering adding more Spanish-language channels and is considering the prospect of adding VOD services offered by Comcast, which has an equity interest in Bresnan

MAJOR HISPANIC MARKETS: Tends to serve smaller and mid-sized markets in four mountain states, many of which have relatively small Hispanic communities. Some smaller systems in Colorado have a high proportion of Hispanics. ■

Distribution

Continued from page 8

cently revamped its offering by adding new networks and over 100 hours of video-on-demand programming to the Cable Latino entry-level package that costs \$20 to \$25.

To better compete with low-cost satellite Hispanic tiers, a number of local systems served by Insight, Charter, Time Warner Cable and Adelphia Communications Corp. have also launched packages priced at under \$30.

Rob Daleo, regional marketing director of video products for Adelphia's California region, says the MSO launched new Hispanic packages priced between \$24.95 and \$29.95 in November of 2003 because the Hispanic community represented their best opportunity to attract new subscribers.

"We realized we had to eliminate the need to buy through expensive digital tiers," says Jeffrey Kapner, the regional director of marketing and strategy for Adelphia's California region.

The Cox Paquete Latino package, priced at about \$35, is slightly more expensive. But the offering includes HBO Latino, and its lineup of up to 35 Spanish channels is larger than the 25 video services offered by

both EchoStar and DirecTV.

Still, many systems and MSOs have a way to go. A number of operators with Hispanic tiers offer 10 or fewer Spanish-language channels, and a few major operators, such as Time Warner Cable, still require subscribers in many of its systems to buy up through the digital tier, forcing a potential Hispanic subscriber to pay \$50 or more for Spanish-language programming.

That is likely to change. Time Warner recently hired a new multicultural marketing director to revamp their strategy. And the under-\$30 entry level Hispanic packages currently available in New York City and San Antonio could soon be offered in other markets.

But the battle between cable and satellite packages is increasingly being fought over more than just price and the number of Spanish-language networks. Comcast is leading the way in this area too, adding 100 hours of free Spanish-language VOD to its offering in October. "It will give us a clear edge over satellite," says Mauro Panzera, Comcast's senior director of multicultural marketing.

Charter, which is in the process of inking a number of programming deals, has also embraced the free VOD strategy. Tim Kelly, director of market-

ing, core video at Charter, argues that free VOD will help them diversify their programming, distinguish their offering from satellite and allow them to serve niche audiences within the Hispanic community, such as immigrants from a specific region of Mexico, without having to launch an entire network or raise the price of the offering.

But executives at Time Warner Cable and Cox seem skeptical.

Cesar Cruz, director of multicultural marketing at Cox, says the first priority has been to expand and market "our core product, which is video."

However, when they begin rolling out Spanish-language VOD in mid-2005, consumers will need to pay something for the product. "If you have strong product, which we plan to have, you shouldn't be giving it away," he says.

Either way, the increased demand for Spanish VOD fare has opened up some opportunities for programmers to launch VOD packages.

World Picks Latino On Demand provides 20 hours a month of Spanish-language VOD, and it's been picked up by such operators as RCN Corp. and Cablevision Systems Corp., explains Cynthia Burnell, senior vice president and general manager of digital media at IFC

Television and World Picks.

Likewise, Schramm Sports and Entertainment will launch Sol VOD to about 6 million homes in early 2005, says Joe Schramm, the company's founding partner and president. "Free VOD reminds me of the Internet bubble," when Web sites erroneously thought advertisers would finance ex-

Still most of the programmers seem to have embraced free VOD, in part because it offers them a way to get carried. "All the programmers we work with are supporting it 100%," notes Jorge Fiterre, a co-partner of Condista, a company that handles distribution for a number of Hispanic networks.

Other Latino-focused prod-

“We realized we had to eliminate the need to buy through expensive digital tiers.”

JEFFREY KAPNER, Adelphia

pensive original content, he says. "We have to have some subscriber fees to provide the kind of unique content that will work."

Both World Picks and Sol VOD are charging for their product but most others aren't doing so well. "Comcast has made it very clear that if we want carriage, we have to provide free VOD," notes one programmer. That creates new expenses for programmers who generally aren't getting subscriber fees in the early years of their contracts.

ucts are also in the works. A number of operators have embraced the idea of bundling their new video offerings with high speed data and phone, adding long distance packages to Mexico and other Latin countries. "Our first priority has been to build up our customer base [for video], but once we do that, we can effectively market other products," says Cruz. He suggests they will be pushing bundles of phone and video by the start of the second quarter of 2005 and triple-play packages by mid-year. ■



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Research

Continued from page 1A

And, says Blanco, "They love gadgets." According to Synovate data, over 61% of Hispanic households have CD players; over 52% own DVD players; and 61% not only own cell phones but constantly experiment with the latest bells and whistles.

"Hispanics are soaking up new things," Blanco says. "They turn over their cell phones constantly; they overindex on speaker phones and other gadgets. Hispanics, with its youth and large families, are the next big thing."

According to the 2000 U.S. Census, Hispanics represent 14% of all U.S. population, but recent data show Hispanics represent 50% of total population of Los Angeles, 30% of New York City and 25% of Chicago.

"We are embedded in the urban culture," Blanco says, but, he warns, that doesn't mean there's one single urban channel to reach them.

"One of the major mistakes advertisers make in trying to reach the Hispanic household is only using Hispanic media," Blanco says. "Even as cable MSOs begin to add incremental new Spanish-language channels, they are not the whole story. In a single Hispanic home, you can have someone watching Discovery Kids, someone watching MTV [Music Television], SciFi [Channel], CNBC, as well as novelas or ESPN Deportes."

In order to understand the "whole story" on Hispanics, Synovate has divided the consumer segment into six categories. The largest category, 26% of all Hispanic households, are the "New Latinos" — relatively young, mostly foreign born, living in America for a significant amount of time, but only partially acculturated with "intermediate levels of cultural tension." On the other hand, the "American Latino," which makes up 23% of Hispanic households, is very comfortable living in both worlds. They are also partially acculturated but have low levels of cultural

tension. This is the group most inclined to purchase electronic gadgets, sports utility vehicles and fast food.

Yankelovich Partners also uses differing Hispanic profiles for its Monitor Multicultural Marketing Study. "Hispanic Dominant" represents those closest to their original culture. "Intercultural" are those who retain as much as possible of their Hispanic culture and values, while also adopting U.S. Anglo culture. "Assimilated" are persons who've moved away from their Hispanic culture to adopt U.S./Anglo culture, language and family values.

And they access information differently. According to Yankelovich, 43% of total Hispanics agree "I get more information about a product when it's advertised in Spanish." Some 83% of those who fall in the Hispanic Dominant category express that belief, but only 36% of Intercultural Hispanics and 10% of Assimilated Hispanics are in agreement with that statement.

According to Schramm, recent findings from Media Audit show real marketing opportunities in several areas where Hispanic buyers are underrepresented. While 76% of the general market has health insurance, only 40% of the Hispanics do; while 86% of the general market has a major credit card, only 52% Hispanic households do; while 65% of general market have home Internet access, only 36% of Hispanics do. More dramatically, while 75% of the general market owns life insurance, only 40% of Hispanics are covered.

All of this suggests that marketers can find plenty of growth potential in the Hispanic arena. But Latinos certainly can't be taken for granted. Blanco points out that the process of learning about Hispanics and understanding their habits and interests is unending.

"The biggest mistakes brands make is thinking that anything they do to reach the Hispanic household is ever enough," Blanco says. "It actually takes years. Brands must understand they won't get immediate results." ■

Local TV

Continued from page 4A

itself to cable systems across the country.

In Phoenix, Mas! Arizona is serving up a blend of news, sports, weather, music videos and community programming to cable subscribers. A joint venture of Belo Corp.'s broadcast station KTVK-TV and Cox Communications Inc., Mas! launched as a local Spanish news channel four years ago and then switched to a broader news, entertainment and community format last March.

And in New York and Kansas City, the Hispanic Information and Telecommunications Network is presenting

local arts, cultural, children's, public affairs and educational programming to cable customers. HITN, carried by Time Warner in those two markets, is also available nationally through DirecTV and Dish Network.

"We cover events in the Latino community like C-SPAN," says Jose Luis Rodriguez, president and CEO of HITN. "We provide programming that will help Latinos understand better their life in this country."

On the local sports front, a number of operators and regional cable networks are now producing game broadcasts in Spanish for their Hispanic viewers.

In New York, Madison Square Garden Network serves up

Spanish play-by-play for the National Basketball Association's New York Knicks, the National Hockey League's New York Rangers and other sports action via a secondary audio programming channel. And in Atlanta, Comcast Corp. has a pact with the local NBC affiliate to air Atlanta Falcons National Football League pre-season games in Spanish on Comcast Sports Southeast.

"Overall, [local Hispanic programmers are] trying to replicate the genres that the general market has," says Burke Berendes, a partner in Condisa, a Miami-based firm that distributes Spanish networks to cable and satellite operators. "It's starting to get a little more specialized." ■

Marketing

Continued from page 5A

says. "We're talking product and services, the overall customer experience, how we advertise."

Of the 1.7 million homes passed by Cox in Arizona, approximately 25% are Hispanic. While the MSO provides 2 million products to Arizona residents statewide, there are roughly 200,000 moderately assimilated Hispanic households that are not taking cable.

Cox went after these homes on their terms, providing Hispanic customers with a start-to-finish Spanish-language customer experience. A dedicated Spanish-language advertising sales team was launched (joining the Spanish-language customer service team in place since 1999); Spanish-speaking field technicians were hired for installations, the Cox Digital Cable welcome kit was produced in Spanish, and a Spanish-language billing statement was introduced. (Cox claims to be the first MSO to bill in Spanish).

Spanish-language cable and broadcast spots were created, and 200,000 direct-mail pieces were sent. No detail was too small. "Most direct-mail pieces to Hispanic homes are large and highly colorful," Maldonado says, "but we never assume

what works. We test-marketed several kinds, and found the best results came from a plain, white No. 10 mail package with a two-sided bilingual letter. Our sales call volume increased by 18%. Our connect rate increased by 32%."

What's more, because the Spanish-language programming tier had a low consumer awareness, Maldonado's team changed TV spot tactics. It dropped a humorous vignette inserted on Spanish TV channels and replaced it with a more direct-response approach, offering tier and price point information and quick cuts of genre programming.

"What's important is you can't offer a great video service and weak customer service," Maldonado explains. "We are offering great video and telephone options along with highly relevant, Spanish-oriented customer service."

HISTORY'S APPROACH

Another service with a decidedly local approach to its Hispanic marketing campaign is The History Channel en español, which had its U.S. launch in June. Working closely with affiliates, the channel is advertising itself at cultural events, neighborhood fairs and Spanish community events, according to Mike Mohamad, senior vice president of marketing at The History Channel.

"We are providing print, TV and radio in 20 markets, but we are also setting up bilingual booths, really doing grass roots marketing," Mohamad says. "You can't do a network spot with this, there's too much waste."

History's thinking also seems to be that there would be too much waste if it simply revociced the mainstream U.S. History Channel — or launched a clone of History's Latin American spinoff. Although clearly, some of its programming has equal relevance both North and South of the Mexican border, like *Raíces de America* (*Roots of America*), which focuses on cliff mummies in the Andes, Mexican pyramids and treasures of Peru.

"We are addressing the needs of the Hispanic community, their acculturation and the interest in understanding their culture," Mohamad says. "Although Hispanics have melded very well, they want to maintain their culture. They speak Spanish at home, and they see The History Channel as relevant to their lives."

Currently The History Channel en español is carried on the Hispanic tiers of the MSOs Comcast, Cox, Insight Communications Co., Adelphia and the National Cable Television Cooperative, which serve about 17 million basic subscribers in total. ■

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Guide to Hispanic TV Channels

A COMPREHENSIVE LISTING OF PROGRAM NETWORKS TARGETING THE UNITED STATES



Football from Argentina on TYC Sports Channel.

ANTENA 3

OWNER: Antena 3 Television S.A
U.S. LAUNCH DATE: September, 1996
HEADQUARTERS: Madrid, Spain
URL: www.antena3tv.es
U.S. SUBSCRIBERS: NA
CONTACTS: Filiberto Fernández, (781) 944-4321
PROGRAMMING: General entertainment, from Spain

AZTECA AMERICA

OWNER: TV Azteca
U.S. LAUNCH DATE: 2001
HEADQUARTERS: El Segundo, CA
URL: www.aztecaamerica.com
U.S. REACH: 78% of U.S. Hispanics
CONTACTS: Carlos de la Garza, president of sales and marketing, (212) 207-8535
PROGRAMMING: General entertainment, sports and news

AYM SPORTS

OWNER: AYM Sports SA de CV
U.S. LAUNCH DATE: April 1, 2004
HEADQUARTERS: Mexico City
URL: www.aymsports.tv
U.S. SUBSCRIBERS: NA
CONTACT: Jorge Fiterre, Condista, (305) 554-1876, Jorge@condista.com
PROGRAMMING: Mexican sports

BANDAMAX

OWNER: TuTv, a joint venture between Univision and Televisa
U.S. LAUNCH DATE: May 2003
HEADQUARTERS: Los Angeles
U.S. SUBSCRIBERS: NA
CONTACT: Ariela Nerubay, vice president of marketing & sales, TuTv, (310) 348-3373
PROGRAMMING: Regional Latin music

BOOMERANG (SAP)

OWNER: Turner Broadcasting System, Inc.
U.S. LAUNCH DATE: April 1, 2000
HEADQUARTERS: Atlanta
URL: www.cartoonnetwork.com/boomerang
U.S. SUBSCRIBERS: 14.4 million
CONTACTS: Michelle Lavender, Turner Network Sales, (404) 827-5335
PROGRAMMING: Classic cartoons from television's golden age

CANAL 24 HORAS

OWNER: Spanish government
U.S. LAUNCH DATE: 2000
HEADQUARTERS: Madrid, Spain
URL: www.rtve.es
U.S. SUBSCRIBERS: 100,000
CONTACTS: Jorge Fiterre, Condista, (305) 554-1876, Jorge@condista.com
PROGRAMMING: News from the Spanish network TVE

CANAL SUR

OWNER: SUR Corp.
U.S. LAUNCH DATE: 1991
HEADQUARTERS: Miami
URL: www.canalsur.com
U.S. SUBSCRIBERS: 1.8 million
CONTACTS: Colleen Glynn, OlympuSAT, (631) 471-5846, colleen@olympusat.com; Jorge Fiterre, Condista, (305) 554-1876, Jorge@condista.com
PROGRAMMING: Entertainment from 15 Latin American countries

CANAL (Á)

OWNER: Pramer SCA.
U.S. LAUNCH DATE: July, 2003.
HEADQUARTERS: Buenos Aires, Argentina.
URL: www.canalaonline.com
U.S. SUBSCRIBERS: NA
CONTACT: Patricia Thompson, vice president of affiliate sales and distribution (54 11) 4778-5300
PROGRAMMING: Argentine channel covering arts, movies, books and culture.

CARACOL TV INTERNACIONAL

OWNER: Caracol Television, Inc.
U.S. LAUNCH DATE: July 2003
HEADQUARTERS: Bogotá, Colombia
U.S. SUBSCRIBERS: 500,000
URL: www.caracoltvinternacional.com

CONTACTS: For distribution: Loic Gosselin, Media Mundi, (305) 535-3577, loic@mediamundi.com.br; for channel information: Luis Calle, lcallear@caracoltv.com.co

CARTOON NETWORK (SAP)

OWNER: Turner Broadcasting System Inc.
U.S. LAUNCH DATE: October 1, 1992
HEADQUARTERS: Atlanta
URL: www.cartoonnetwork.com
U.S. SUBSCRIBERS: 87.1 million
CONTACTS: Michelle Lavender, Turner Network Sales, (404) 827-5335
PROGRAMMING: Cartoons

CASA CLUB TV

OWNER: MGM Worldwide, UnitedGlobalCom Inc.
U.S. LAUNCH DATE: June 2003
HEADQUARTERS: Miami
URL: www.casaclubtv.com
U.S. SUBSCRIBERS: NA
CONTACTS: Raoul De Sota, senior vice president business development, (305) 648-5225, rdesota@mgmlatino.com
PROGRAMMING: Home and lifestyle

CB TV TELEVISIÓN MICHOACÁN

OWNER: Private investors
U.S. LAUNCH DATE: TBA
HEADQUARTERS: Morelia, Michoacán, Mexico
URL: Coming soon
CONTACTS: Ivette Mendez, (877) 728-6391, ivette.mendez@satmex.com; Mark Henderson, (770) 396-7850, mark@castaliacom.com
PROGRAMMING: News and general entertainment from Michoacán, Mexico

CENTROAMERICA TV

OWNER: Private investors
U.S. LAUNCH DATE: Sept. 15, 2004
HEADQUARTERS: Miami
URL: www.centroamericatv.tv
U.S. SUBSCRIBERS: NA
CONTACT: Jesus Aranda, general manager, jesus.aranda@centroamericatv.tv, (305) 418-2101
PROGRAMMING: Central American news, soccer, family entertainment

CINE LATINO

OWNER: MVS Television
U.S. LAUNCH DATE: 1999
HEADQUARTERS: Mexico City
U.S. SUBSCRIBERS: 1.6 million
CONTACTS: Jorge Fiterre, Condista, (305) 554-1876, Jorge@condista.com; Colleen Glynn, OlympuSAT, (631) 471-5846

PROGRAMMING: Contemporary Spanish-language films

CINE MEXICANO

OWNER: Cine Mexicano LLC
US LAUNCH DATE: Nov. 1, 2004
HEADQUARTERS: Miami
U.S. SUBSCRIBERS: NA
CONTACTS: Colleen Glynn, OlympuSAT, (631) 471-5846, colleen@olympusat.com
PROGRAMMING: Contemporary Spanish-language movies with features from Mexico

CNC COLOMBIA

OWNER: Cable Union del Occidente
U.S. LAUNCH DATE: 1999
HEADQUARTERS: Bogotá, Colombia
U.S. SUBSCRIBERS: 200,000
CONTACTS: Jorge Fiterre, Condista, (305) 554-1876, Jorge@condista.com
PROGRAMMING: Colombian superstation

CNN EN ESPAÑOL

OWNER: Turner Broadcasting System Inc.
U.S. LAUNCH DATE: 1997
HEADQUARTERS: Atlanta
U.S. SUBSCRIBERS: 2.6 million
CONTACTS: Robert Gordillo, (323) 965-3057; Brian McCullough, (212) 591-9054
PROGRAMMING: News and analysis

DE PELÍCULA

OWNER: TuTv, a joint venture between Univision and Televisa
U.S. LAUNCH DATE: May 2003
HEADQUARTERS: Los Angeles
U.S. SUBSCRIBERS: NA
CONTACT: Ariela Nerubay, vice president of marketing and sales, TuTv, (310) 348-3373
PROGRAMMING: Contemporary and classic movies

DE PELÍCULA CLÁSICO

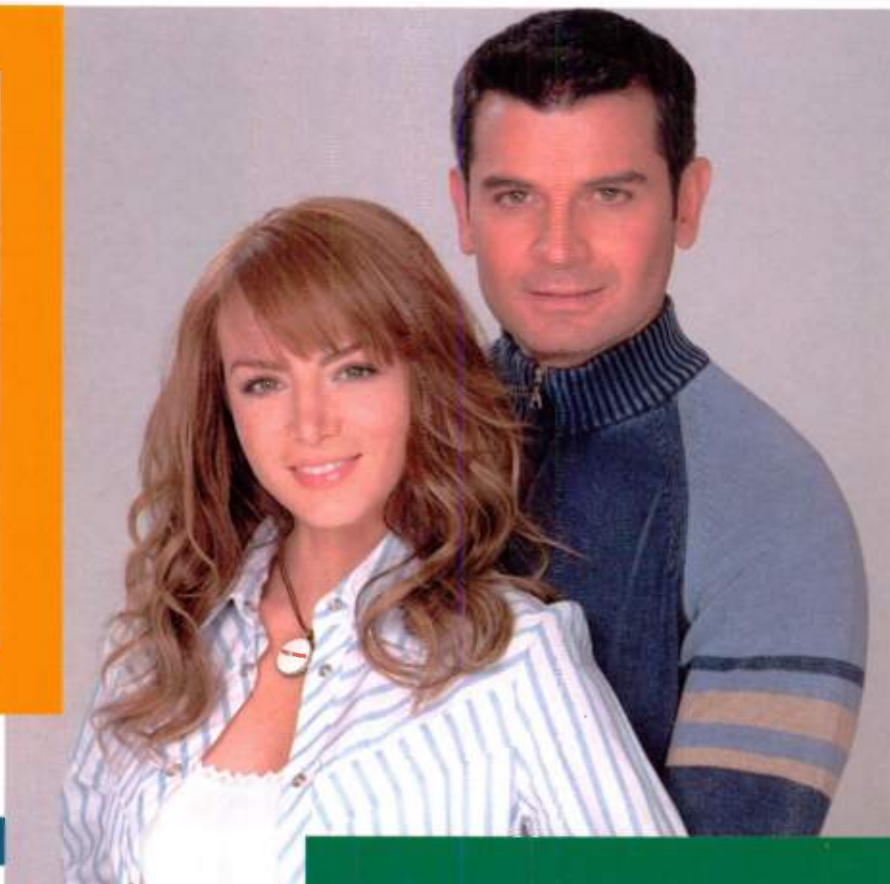
OWNER: TuTv, a joint venture between Univision and Televisa
U.S. LAUNCH DATE: May 2003
HEADQUARTERS: Los Angeles
U.S. SUBSCRIBERS: NA
CONTACT: Ariela Nerubay, vice president of marketing and sales, TuTv, (310) 348-3373
PROGRAMMING: Classic movies

DISCOVERY ESPAÑOL

OWNER: Discovery Networks U.S.
U.S. LAUNCH DATE: June 1998
HEADQUARTERS: Silver Spring, Md.
URL: www.discovery.com
U.S. SUBSCRIBERS: 7.3 million
CONTACTS: Bill Goodwyn, president, affiliate sales and marketing (704) 557-2454; David Karp,

Television for Hispanics by Hispanics

Novelas



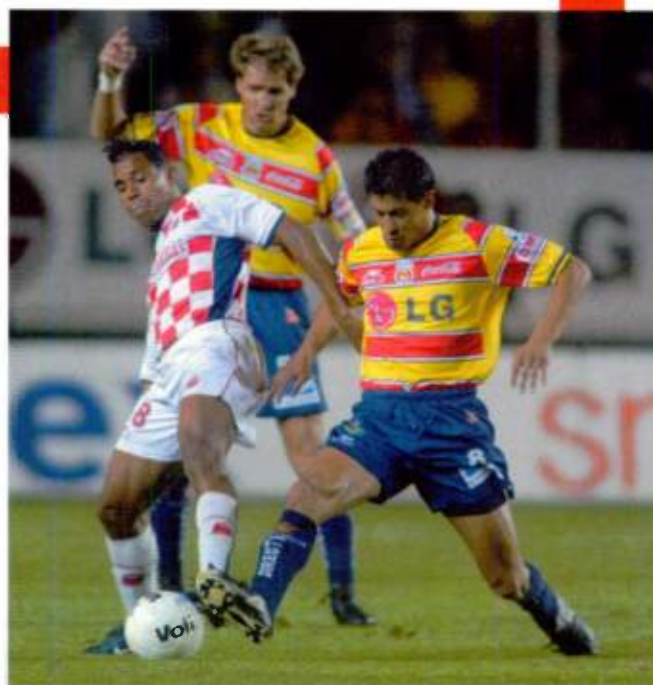
Entertainment



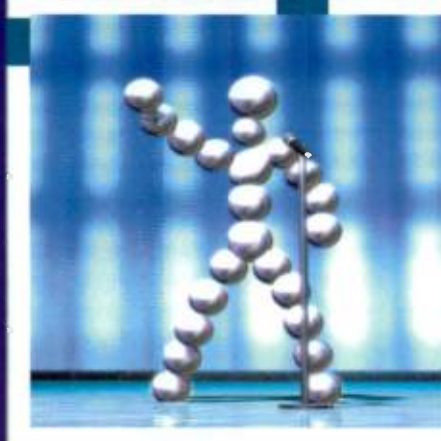
News



Sports



Reality Shows



AZTECA AMERICA

Sales (212) 207-8535

World Radio History

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senior vice president and general manager, Discovery en Español, (240) 662-5789; Mike Van Bergen, local ad sales, (240) 662-2861
PROGRAMMING: Science, kids, natural history, history and health

ECUAVISA INTERNACIONAL

OWNER: Private investors
U.S. LAUNCH DATE: Third quarter, 2004
HEADQUARTERS: Guayaquil, Ecuador
URL: www.ecuavisa.com
U.S. SUBSCRIBERS: NA
CONTACTS: Ivette Mendez, (877) 728-6391, ivette.mendez@satmex.com; Mark Henderson, (770) 396-7850, mark@castaliacom.com
PROGRAMMING: General entertainment channel from Ecuador

EL GOURMET.COM

OWNER: Pramer SCA
U.S. LAUNCH DATE: July, 2003
HEADQUARTERS: Buenos Aires, Argentina
URL: www.elgourmet.com
U.S. SUBSCRIBERS: NA
CONTACT: Patricia Thompson, vice president of affiliate sales and distribution (54 11) 4778-5300
PROGRAMMING: Cooking, travel and lifestyle

EL GARAGE TV

OWNER: Car's Multimedia Holding
U.S. LAUNCH DATE: March 2005
HEADQUARTERS: Argentina
URL: NA
U.S. SUBSCRIBERS: NA
CONTACT: Jorge Fiterre, Condista, (305) 554-1876, Jorge@condista.com
PROGRAMMING: Automotive

ESPN DEPORTES

OWNER: ESPN
U.S. LAUNCH DATE: 2004
HEADQUARTERS: Bristol, Conn.
U.S. SUBSCRIBERS: NA
CONTACTS: Steve Raymond, senior vice president, affiliate sales, western division, (303) 290-7881
PROGRAMMING: Sports

EWTN ESPAÑOL

OWNER: EWTN Global Catholic Network
U.S. LAUNCH DATE: 1999
HEADQUARTERS: Birmingham, Ala.
URL: www.ewtn.com/spanish
U.S. SUBSCRIBERS: NA
CONTACTS: Walter Cordova, national marketing manager, (205) 795-5843
PROGRAMMING: Worldwide religious programming

FAMILY CHRISTIAN TELEVISION

OWNER: Fore Christ Corp.
U.S. LAUNCH DATE: 2003
HEADQUARTERS: San Jose,

Costa Rica
U.S. SUBSCRIBERS: NA
CONTACTS: Colleen Glynn, OlympuSAT, (631) 471-5846, colleen@olympusat.com
PROGRAMMING: Family-oriented

FOX SPORTS EN ESPAÑOL

OWNER: Fox Pan American Sports LLC
U.S. LAUNCH DATE: Nov. 1, 1996
HEADQUARTERS: Los Angeles
URL: www.fse.terra.com
U.S. SUBSCRIBERS: 6.6 million
CONTACTS: Sean Riley, senior vice president affiliate sales, (310) 229-4949
PROGRAMMING: Sports

GALAVISIÓN

OWNER: Univision Communications
U.S. LAUNCH DATE: 1979
HEADQUARTERS: New York
URL: www.univision.com
U.S. SUBSCRIBERS: 40 million
CONTACTS: Tim Krass, executive vice president, affiliate sales and marketing, (310) 348-4865
PROGRAMMING: News, sports and entertainment.

GOL TV

OWNER: Private investors
U.S. LAUNCH DATE: 2003
HEADQUARTERS: Miami
URL: www.goltv.tv
U.S. SUBSCRIBERS: 5 million
CONTACTS: Rodrigo Lombello, (305) 864-9799, info@goltv.tv
PROGRAMMING: Soccer matches, mostly from Latin America and Europe

GRANDES DOCUMENTALES

OWNER: RTVE
U.S. LAUNCH DATE: 1999
HEADQUARTERS: Madrid, Spain
URL: www.rtve.es
U.S. SUBSCRIBERS: 500,000
CONTACTS: Jorge Fiterre, Condista, (305) 554-1876, Jorge@condista.com
PROGRAMMING: Documentaries, biographies and travel

HBO LATINO

OWNER: HBO
U.S. LAUNCH DATE: 2000
HEADQUARTERS: New York
URL: www.hbolatino.com
CONTACTS: Jodie Hauptmann, manager, corporate affairs, (212) 512-1000
PROGRAMMING: Movies, events and HBO original series

HISPANIC INFORMATION AND TELECOMMUNICATIONS NETWORK

OWNER: Jose Luis Rodriguez
U.S. LAUNCH DATE: 1987

HEADQUARTERS: New York
URL: www.hitn.tv
U.S. SUBSCRIBERS: 13.7 million
CONTACTS: Richard Taub, senior vice president, network strategy and distribution, (212) 966-5660

THE HISTORY CHANNEL EN ESPAÑOL

OWNER: A&E Television Networks
U.S. LAUNCH DATE: June 2004
HEADQUARTERS: New York
URL: www.historychannel.com
U.S. SUBSCRIBERS: NA
CONTACT: Marlene Braga, Director,

LA FAMILIA

OWNER: Clark Ortiz Enterprises
U.S. LAUNCH DATE: 2002
HEADQUARTERS: Charlotte, N.C.
URL: www.inspnets.com
U.S. SUBSCRIBERS: 400,000
CONTACTS: Tom Hohman, senior vice president of affiliate relations, (704)-525-9800 ext. 4208; Wendy Vinson, vice president, affiliate marketing, (704) 525-9800 ext. 4702
PROGRAMMING: Family-friendly entertainment

LATV

OWNER: LATV, LLC
U.S. LAUNCH DATE: October 2003
HEADQUARTERS: Los Angeles
URL: www.latv.com
U.S. SUBSCRIBERS: 3.5 million (cable and satellite only)
CONTACTS: Starrett Berry, consultant, (310) 943-5288
PROGRAMMING: Music and entertainment for U.S. Latino youth

MARIA VISION

OWNER: Mariavision Partners
U.S. LAUNCH DATE: 2003



Utilissima's Brico Kids

programming and production (212) 210 9185, Kathie Gordon, Director, public relations (212) 210-1400
PROGRAMMING: History

HTV

OWNER: Claxson
U.S. LAUNCH DATE: 1999
HEADQUARTERS: Miami
URL: www.htv.com
U.S. SUBSCRIBERS: 1.3 million
CONTACTS: Jorge Fiterre, Condista, (305) 554-1876, Jorge@condista.com
PROGRAMMING: Latin pop music

INFINITO

OWNER: Claxson
U.S. LAUNCH DATE: 2002
HEADQUARTERS: Miami
URL: www.infinito.com
U.S. SUBSCRIBERS: 200,000
CONTACTS: Jorge Fiterre, Condista, (305) 554-1876, Jorge@condista.com
PROGRAMMING: Focusing on unknown and unexplained phenomena

LATINOAMÉRICA TV

OWNER: Private investors
U.S. LAUNCH DATE: TBA
HEADQUARTERS: Montevideo, Uruguay
URL: www.latele.tv
U.S. SUBSCRIBERS: NA
CONTACTS: Ivette Mendez, (877) 728-6391, ivette.mendez@satmex.com; Mark Henderson, (770) 396-7850, mark@castaliacom.com
PROGRAMMING: Family-oriented channel featuring news and entertainment for South Americans

LATIN TV (LTV)

OWNER: LTV Networks, Inc.
U.S. LAUNCH DATE: 1998
HEADQUARTERS: New York
URL: www.ltvbroadband.com
U.S. SUBSCRIBERS: 1.5 million
CONTACTS: Colleen Glynn, OlympuSAT, (631) 471-5846, colleen@olympusat.com
PROGRAMMING: Entertainment, news for young bi-lingual Latinos

HEADQUARTERS: Mexico City
URL: www.mariavision.com.mx
U.S. SUBSCRIBERS: NA
CONTACT: Gregg Hill, (516) 803-4637, ghill@rainbow-media.com
PROGRAMMING: Issues related to Catholicism

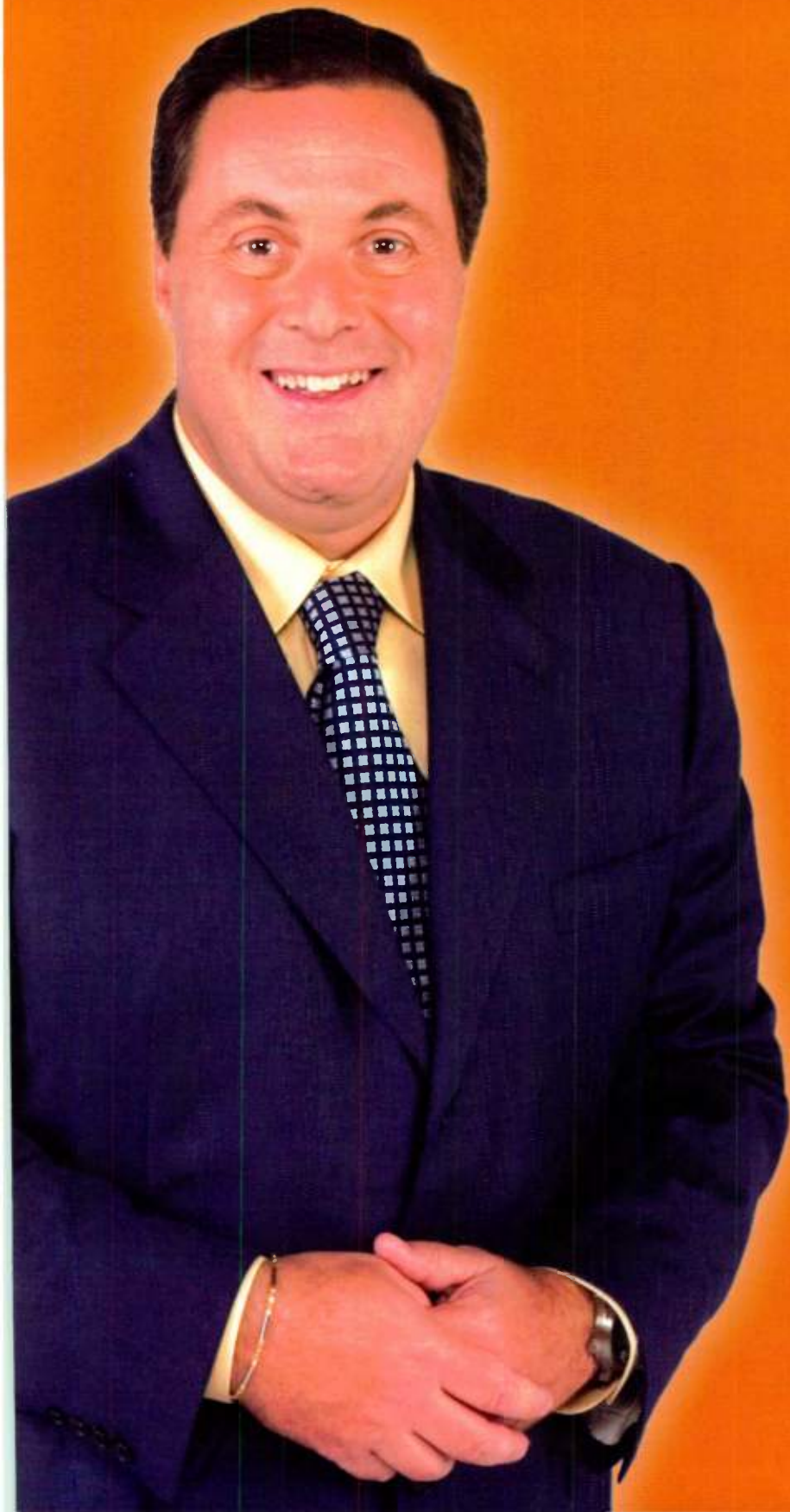
MÁS MÚSICA TEVE NETWORK

OWNER: Eduardo Caballero
U.S. LAUNCH DATE: 1998
HEADQUARTERS: Coral Gables
URL: www.masmusica.tv
U.S. SUBSCRIBERS: 12.5 million
CONTACTS: Eduardo Caballero, CEO, (305) 648-0065
PROGRAMMING: Music videos

MEXICO 22

OWNER: Mexican government via the Mexican National Council for the Culture and Arts
U.S. LAUNCH DATE: Second quarter, 2004
HEADQUARTERS: Mexico City, Mexico
URL: www.22mexico.tv
U.S. SUBSCRIBERS: NA

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CONTACTS: Ivette Mendez, (877) 728-6391, ivette.mendez@satmex.com; Mark Henderson, (770) 396-7850, mark@castaliacom.com
PROGRAMMING: Factual, on Mexican culture

MOMENTUMTV

OWNER: Colorado Group
U.S. LAUNCH DATE: 2003
HEADQUARTERS: Mexico City
URL: www.momentum.tv
U.S. SUBSCRIBERS: NA
CONTACT: Gregg Hill, (516) 803-4637, ghill@rainbow-media.com
PROGRAMMING: Commercial free — arts, history, and science

MOVIEWORLD

OWNER: Colorado Group
U.S. LAUNCH DATE: 2003
HEADQUARTERS: Mexico City
URL: www.movieworldtv.com
U.S. SUBSCRIBERS: NA
CONTACT: Gregg Hill, (516) 803-4637, ghill@rainbow-media.com
PROGRAMMING: Theatrical and made-for-TV movies

MTV ESPAÑOL

OWNER: MTV Networks
U.S. LAUNCH DATE: 1998
HEADQUARTERS: New York
URL: www.mtv.com
U.S. SUBSCRIBERS: 13 million
CONTACTS: Lucia Ballas-Traynor, senior vice president, general manager 212-846-5264
PROGRAMMING: Music and other youth-culture programming

MUN2

OWNER: NBC
U.S. LAUNCH DATE: 2001
HEADQUARTERS: Hialeah, Fla.
URL: www.mun2tv.com
U.S. SUBSCRIBERS: 8.8 million
CONTACTS: East Coast, (201) 735-3600; West Coast, (818) 840-3333
PROGRAMMING: Latino general entertainment

NDTV COLOR VISIÓN

OWNER: Private investors
U.S. LAUNCH DATE: 2004
HEADQUARTERS: Santo Domingo, Dominican Republic
URL: TBA
U.S. SUBSCRIBERS: NA
CONTACTS: Ivette Mendez, (877) 728-6391, ivette.mendez@satmex.com; Mark Henderson, (770) 396-7850, mark@castaliacom.com
PROGRAMMING: Family-oriented, from Dominican Republic



Telediario from Canal 24 Horas

NICKTOONS (SAP)

OWNER: Viacom
U.S. LAUNCH DATE: October 2004
HEADQUARTERS: New York
URL: www.nicktoons.com
U.S. SUBSCRIBERS: 28 million
CONTACTS: Keith Dawkins; vice president and general manager, Nicktoons, (212)-846-3956, keith.dawkins@nick.com
PROGRAMMING: Animation

NUEVA VIDA VISION

OWNER: Nueva VidaVision
U.S. LAUNCH DATE: 2004 relaunch of Vida Vision
HEADQUARTERS: Miami
URL: www.nuestraraza.com
U.S. SUBSCRIBERS: NA
CONTACTS: Colleen Glynn, OlympuSAT, (631) 471-5846, colleen@olympusat.com
PROGRAMMING: Variety and original productions

ONCE MEXICO

OWNER: Mexican Government
U.S. LAUNCH DATE: 2004
HEADQUARTERS: Mexico City
URL: www.ocetv.ipn.mx
U.S. SUBSCRIBERS: NA
CONTACTS: Ivette Mendez, (877) 728-6391, ivette.mendez@satmex.com;

Mark Henderson, (770) 396-7850, mark@castaliacom.com
PROGRAMMING: Variety, including children's, talk shows and news

OLE TV

OWNER: Ole TV Network
U.S. LAUNCH DATE: 1998
HEADQUARTERS: Miami
URL: www.oletvnetwork.com/index.htm
U.S. SUBSCRIBERS: NA
CONTACT: Gregg Hill, (516) 803-4637, ghill@rainbow-media.com
PROGRAMMING: Family entertainment

PLAYBOY EN ESPAÑOL

OWNER: Playboy TV International
U.S. LAUNCH DATE: 2000
HEADQUARTERS: Los Angeles
URL: www.playboytv.com
U.S. SUBSCRIBERS: NA
CONTACTS: Craig Simon, senior executive, sales, (323) 276-4000
PROGRAMMING: Adult, erotic channel

PUMA TV

OWNER: Ole Communications/El Puma
U.S. LAUNCH DATE: 1999
HEADQUARTERS: Caracas, Venezuela
URL: www.puma-tv.com
U.S. SUBSCRIBERS: 500,000
CONTACTS: Jorge Fiterre,

(305) 554-1876, Jorge@condista.com; Colleen Glynn, OlympuSAT, (631) 471-5846
PROGRAMMING: Music videos directed at young Hispanics

RITMOSON LATINO

OWNER: TuTv, a joint venture between Univision and Televisa
U.S. LAUNCH DATE: May 2003
HEADQUARTERS: Los Angeles
U.S. SUBSCRIBERS: NA
CONTACT: Ariela Nerubay, vice president of marketing & sales, TuTv, (310) 348-3373
PROGRAMMING: Latin Music

SÍ TV

OWNER: Private investment group
U.S. LAUNCH DATE: February 2004
HEADQUARTERS: Los Angeles
URL: www.sitv.com
U.S. SUBSCRIBERS: 7 million
CONTACTS: Leo Perez, COO, (323) 256-8900
PROGRAMMING: English-language, targeting Latinos

SOL VOD

OWNER: Schramm Sports & Entertainment
U.S. LAUNCH DATE: Jan. 1, 2005
HEADQUARTERS: New York
URL: TBA
U.S. SUBSCRIBERS: Projecting 6.5 million at launch

CONTACTS: Joseph Schramm, president, 212-983-0219
PROGRAMMING: Movies, soccer, animation and more

SORPRESA

OWNER: Firestone Communications
U.S. LAUNCH DATE: March 2003
HEADQUARTERS: Fort Worth, Texas
URL: www.sopresatv.com
U.S. SUBSCRIBERS: 500,000
CONTACTS: Christopher Firestone, vice president, affiliate sales; Skip Broudsard, national sales manager, (817) 222-1234
PROGRAMMING: Children's fare

TBN ENLACE USA

OWNER: Trinity Broadcasting Network/Enlace
U.S. LAUNCH DATE: 2002
HEADQUARTERS: Dallas, Texas
URL: www.tbnenlaceusa.com
U.S. SUBSCRIBERS: 1.5 million
CONTACT: TBN Networks, Bob Higley, (972) 313-9500
PROGRAMMING: Inspirational

TELEFE INTERNATIONAL

OWNER: Television Federal S.A.
U.S. LAUNCH DATE: 2001
HEADQUARTERS: Buenos Aires, Argentina
U.S. SUBSCRIBERS: 200,000
CONTACTS: Jorge Fiterre,



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Guide to Hispanic TV Channels

Condista, (305) 554-1876,
Jorge@condista.com
PROGRAMMING: Family entertainment

TELEFUTURA

OWNER: Univision Communications
U.S. LAUNCH DATE: 2002
HEADQUARTERS: Miami
URL: www.univision.com
U.S. REACH: 80% of Hispanic households
CONTACTS: Tim Krass, executive vice president, affiliate sales and marketing, (310) 348-4865
PROGRAMMING: General entertainment

TELEHIT

OWNER: TuTv, a joint venture between Univision and Televisa
U.S. LAUNCH DATE: May 2003
HEADQUARTERS: Los Angeles
U.S. SUBSCRIBERS: 7 million
CONTACT: Ariela Nerubay, vice president of marketing & sales, TuTv, (310) 348-3373
PROGRAMMING: Spanish and English urban music

TELEMUNDO

OWNER: NBC
U.S. LAUNCH DATE: 1986
HEADQUARTERS: Hialeah, Fla.
URL: www.telemundo.com
U.S. REACH: 92% of Hispanic households
CONTACTS: Steve Mandala, executive vice president network sales, (212) 664-3599
PROGRAMMING: General entertainment

TEVE-DE-MENTE

OWNER: Private investors
U.S. LAUNCH DATE: TBA
HEADQUARTERS: Mexico City
URL: TBA
U.S. SUBSCRIBERS: NA
CONTACTS: Ivette Mendez, (877) 728-6391, ivette.mendez@satmex.com; Mark Henderson, (770) 396-7850, mark@castaliacom.com
PROGRAMMING: Mexican programming for immigrant families

TOON DISNEY (SAP)

OWNER: ABC Cable Networks Group
U.S. LAUNCH DATE: April 18, 1998
HEADQUARTERS: Burbank, Calif.
U.S. SUBSCRIBERS: 47 million
CONTACTS: Ben Pyne, senior vice president, affiliate sales & marketing, ABC Cable Networks Group, (818) 569-7535
PROGRAMMING: Animation

TV CHILE

OWNER: Chilean government
U.S. LAUNCH DATE: 1999
HEADQUARTERS: Santiago, Chile
URL: www.tvchile.cl
U.S. SUBSCRIBERS: 1.3 million
CONTACTS: Colleen Glynn, OlympuSAT, (631) 471-5846, colleen@olympusat.com
PROGRAMMING: Family entertainment

TV COLOMBIA

OWNER: Latinamerican Television LLC
U.S. LAUNCH DATE: 2003
HEADQUARTERS: Miami
URL: www.tvcolombia.com
U.S. SUBSCRIBERS: NA

CONTACTS: Colleen Glynn, OlympuSAT, (631) 471-5846, colleen@olympusat.com
PROGRAMMING: Entertainment, news and children's fare

TVE INTERNACIONAL

OWNER: Spanish government
U.S. LAUNCH DATE: 1999
HEADQUARTERS: Madrid, Spain
URL: www.rtve.es
U.S. SUBSCRIBERS: 1.6 million
CONTACTS: Jorge Fiterre, Condista, (305) 554-1876, Jorge@condista.com
PROGRAMMING: General interest

TYC SPORTS CHANNEL

OWNER: Tele Red Imágen S.A. (Grupo Clarín, 50%, Torneos y Competencias, 50%)
U.S. LAUNCH DATE: March 2003
Headquarters: Buenos Aires, Argentina
URL: www.tycsports.com
U.S. SUBSCRIBERS: About 450,000
CONTACTS: Rafael Pizarro, international sales manager; Ariel Katz, manager assistant, phone: (011) 5411-4300-3800, fax: (011) 5411-4300-3499
PROGRAMMING: Sports

UNIVISION

OWNER: Univision Communications
U.S. LAUNCH DATE: 1961
HEADQUARTERS: Los Angeles
URL: www.univision.com
U.S. REACH: 98% of Hispanic households
CONTACTS: Tim Krass, executive vice president, affiliate sales and marketing,

(310) 348-4865
PROGRAMMING: General entertainment, sports and news

UTILÍSSIMA

OWNER: Ernesto Sandler
U.S. LAUNCH DATE: 1996
HEADQUARTERS: Buenos Aires, Argentina
URL: www.utilissima.com
U.S. SUBSCRIBERS: 800,000
CONTACTS: Jorge Fiterre, Condista, (305) 554-1876, Jorge@condista.com
PROGRAMMING: Women-oriented

VHUNO

OWNER: MTV Networks
U.S. LAUNCH DATE: 1999
HEADQUARTERS: New York
URL: www.vhuno.com
U.S. SUBSCRIBERS: 4.3 million
CONTACTS: Lucia Ballas-Traynor, senior vice president, general manager, (212) 846-5264
PROGRAMMING: Music videos

VIDEO ROLA

OWNER: Mega Cable
U.S. LAUNCH DATE: 2000
HEADQUARTERS: Guadalajara, Jalisco, Mexico
URL: www.videorola.com
U.S. SUBSCRIBERS: 600,000
CONTACTS: Jorge Fiterre, Condista, (305) 554-1876, Jorge@condista.com
PROGRAMMING: Regional Mexican music

VOY NETWORK

OWNER: VOY Group, LLC
U.S. LAUNCH DATE: July 2005
HEADQUARTERS: Los Angeles
URL: www.voygroup.com
U.S. SUBSCRIBERS: NA
CONTACTS: Andrew Thau, president and CEO, (310) 205-0300
PROGRAMMING: English-language lifestyle and entertainment

WORLD PICKS LATINO ON DEMAND

OWNER: Rainbow Media Holdings
U.S. LAUNCH DATE: July, 2003
HEADQUARTERS: New York
URL: www.worldpicks.com
CONTACT: Gregg Hill, (516) 803-4637, ghill@rainbow-media.com
PROGRAMMING: Concert specials, biographies, series and more, all on demand

WAPA-AMERICA

OWNER: LIN TV Corp.
U.S. LAUNCH DATE: 2004
HEADQUARTERS: Providence, R.I.
URL: www.wapaamerica.com
U.S. SUBSCRIBERS: About 500,000
CONTACTS: Vincent L. Sadusky, CFO, (401) 457-9403
PROGRAMMING: Puerto Rican news, entertainment and classic shows

SOURCE: Listing compiled by George Winslow from program networks. Data as of Nov. 19, 2004. Several networks that have limited carriage in the U.S. were not included because they did not respond to requests for information over a two week period.

Top Hispanic TV Station Groups



Dolores Heredia, Karina Mora Novelo, Mariana Gaja and Ana de La Reguera star in the telenovela *Gitanas* on Telemundo.

UNIVISION

OWNER: Univision Communications Inc.
TOP EXECUTIVE: A. Jerrold Perenchio, chairman and CEO
HEADQUARTERS: 5999 Center Drive, Los Angeles, CA 90045, (310) 216-3434
37 stations — 3 VHF, 34 UHF
U.S. HISPANIC REACH: 98%
TELEFUTURA AFFILIATES: 17 stations
UNIVISION AFFILIATES: 15 stations
INDEPENDENTS: 2 stations

ENTRAVISION

OWNER: 31% owned by Univision
TOP EXECUTIVE: Walter F. Ulloa, chairman and CEO
HEADQUARTERS: 2425 Olympic Blvd., Suite 6000W, Santa Monica, CA 90404, (310) 447-3870
56 stations — 6 VHF, 50 UHF
U.S. HISPANIC REACH: 75%
UNIVISION AFFILIATES: 31 stations
TELEFUTURA AFFILIATES: 19 stations
TELEMUNDO AFFILIATES: 2 stations
FOX AFFILIATES: 1 station
UPN AFFILIATES: 1 station
INDEPENDENTS: 1 station

TELEMUNDO COMMUNICATIONS GROUP INC.

OWNER: G.E. Corp.
TOP EXECUTIVE: James McNamara, president and CEO
HEADQUARTERS: 2290 West 8th Ave., Hialeah, FL 33010, (305) 884-8200
28 stations — 2 VHF, 26 UHF
U.S. HISPANIC REACH: 91%
TELEMUNDO AFFILIATES: 15 stations

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Fans Know What They Like, Repeatedly

In a fickle world, a trio of sitcoms have awesome staying power

By Kevin Downey

You'd think they'd scream, enough already! But television viewers, whose tastes can change in an instant, show no sign of tiring of three off-network sitcoms: Sony TV's *Seinfeld*, Warner Bros.' *Friends* and King World's *Everybody Loves Raymond*.

Consider this, a month and a half before NATPE: The three classics are among the highest-rated shows in syndication and often draw more viewers than many prime time programs on the broadcast networks.

That kind of staying power is rare. For example, ABC learned the hard way that viewers could get too much of *Who Wants To Be a Millionaire*. The popularity of these sitcoms is almost a psychographic aberration.

Off-net *Friends*, *Seinfeld* and *Raymond* run on cable and broadcast, and *Raymond* is still producing new episodes for CBS. But viewers are flocking to the off-net versions, even as sitcoms hit the DVD market, as *Seinfeld* did last month. And that's for repeats of repeats.

In the topsy-turvy off-net world, viewers specifically gravitate to episodes they've already seen, the precise opposite of what happens to most current prime time programs repeated during the summer.

The Syndicated Network Television Association (SNTA), which represents syndicators to advertisers, notes that, for the broadcast season through Nov. 7, *Everybody Loves Raymond* on CBS, the top comedy on prime time television, pulled an average 5.8 Nielsen rating in the 18-49 demo. In syndication, it earned just

1989. If you're a 20-year-old USC kid right now, you were only 5 years old when it came out."

Terri McKinzie, associate media director at Starcom USA, says new viewers coming to top-rated off-nets are demographically similar to viewers who currently watch the show in syndication or watched it when it was new on network TV: "The younger people are coming in, so the audience continues to refresh. The core audience, from a demographic perspective, kind of stays the same."

Those three shows far outperform any other off-net comedy in syndication, according to media buying agency Magna Global USA. Through mid October, all three shows had a 4.2 rating adult 18-49—*Raymond* posting a 20% year-to-year increase, *Seinfeld* and *Friends* down slightly—putting them 1.7 rating points ahead of the nearest competitor, Twentieth Television's *That '70s Show*.

"This season, the [off-net] shows that are stable or growing are the stronger sitcoms that already had a following and were high-rated in broadcast," says Jordan Breslow, director of broadcast research at MediaCom. "The shows



The classics: *Seinfeld* (top) *Friends* (bottom left) and *Everybody Loves Raymond*

In the topsy-turvy off-net world, viewers specifically gravitate to episodes they've already seen, the precise opposite of what happens to most current prime time programs repeated during the summer.

one rating point less.

In fact, in the adults 18-49 demographic, all three shows typically generate ratings in the 4-plus range most days of the week. SNTA says the shows rank in the top 10 in most demos when compared with all programs on TV.

With viewer interest so high, the top-rated off-nets are likely to continue to defy the relatively brief life cycle of most off-net shows.

David Mumford, executive vice president of planning and operations at Sony Pictures Television, explains that, while some viewers move on to other shows, new viewers replace them. "What we found with *Seinfeld* and some other comedies is that there is a whole new crop of viewers every year that come out of college," he says. "The *Seinfeld* pilot premiered in

that are squeaking by, like *Becker*, *Coach* and *Dharma & Greg*, did okay on network but relied on the show that aired before it [to deliver an audience to them]. Those shows will have a limited life cycle in syndication."

In the recent past, off-net sitcoms (outside of a handful like *M*A*S*H* and *I Love Lucy*) tended to be gone after one or perhaps two cycles in syndication.

But *Seinfeld* begins its third cycle in 2006, stretching its run to 2011. *Friends* starts its second cycle next season, sold at prices close to *Seinfeld*'s \$4 million per episode. *Raymond* begins its second cycle in 2008.

A big reason for their success is the lack of high-profile programs to replace them. Only three network sitcoms went into syndication this season and five modestly rated sitcoms such as ABC's *My Wife & Kids* are set to hit off-net next season.

Blame reality. The number of broadcast network sitcoms fell from 43 in fall 2000 to 36 this season, according to Magna. During the same time, reality shows grew from zero to 16.

"The whole reality craze really impacted sitcoms tremendously, so stations are starving for A-level comedies," says Bruce K. Rosenblum, executive vice president of research at Warner Bros. Domestic Television Distribution. "There used to be a tremendous amount of programs available. Now there is a shortage."

But no matter how few sitcoms are heading to syndication, the big three off-nets—*Raymond*, *Friends*, *Seinfeld*—wouldn't stick around if viewers weren't watching them, says Shari Anne Brill, vice president and director of programming at Carat USA. "As long as people continue to watch these shows," she says, "the syndicators will continue to sell them."

Not that there's anything wrong with that. ■

WHAT'S COMING

The Foundations of Syndication Special Reports on tap for future weeks:

Dec. 13: The Formats: From game shows to talk shows to court, what's hot and what's not

Dec. 20: The Producers: A look at the top creators of syndicated programming

Jan. 3: The Executives: Syndication's top execs and their views of the business

Jan. 10: The Station Groups: The big broadcasters that make or break syndicated programs

Talk Gets Younger, Richer Crowd

The audience for syndicated television's daytime audience is changing for the better. There has been an upswing this season in the number of young and relatively affluent women tuning in, which is good news for syndicators and stations.

Talk shows, in particular, are posting gains. While average ratings are down for all of syndicated TV and about flat for court shows among women 18-34 and women 18-49, talk-

show ratings for the demos are up 13% and 19%, respectively, for the time period Aug. 30-Nov. 14.

Moreover, among women 18-34 with household incomes of \$75,000 or more, the average talk-show rating is up 13% from the same time last year. That is based on analysis of Nielsen Media Research data by Warner Bros. Domestic Television Distribution.

The increases in viewing among young affluent women can largely be pinned on three shows: King World's *The Oprah Winfrey Show* and *Dr.*

Phil and Warner Bros.' *The Ellen DeGeneres Show*.

Follow the Money

Oprah's average audience among women 18-34 with household incomes over \$50,000 is up nearly 22% from last season's average to 773,000, based on Nielsen ratings for the broadcast season through Nov. 7. *Dr. Phil's* audience in the demo is up about 24% to 478,000, and *Ellen's* audience is up 27% to 186,000. Compared with the 2002-03 season, both *Oprah* and *Dr. Phil* have posted increases of roughly 50% in that

sweet-spot demographic.

But affluent women watching daytime talk are still unusual. They represent a small percentage of each show's audience: for example, about 7% of *Oprah's* total audience. But it is a group sought after by many advertisers.

That is particularly so because women watching TV during the day also tend to be the members of a household doing the shopping, says Joanne Burns, senior vice president of sales marketing, research, and new media at Twentieth Television.

"With the time available, they are the heavy consumers," she says. "That's as opposed to the prime time audience. Those shows in prime time get a lot of female viewers who are still the primary target of a lot of advertisers. But they don't have a lot of time for shopping."

The average person watching syndicated daytime programs is 46 years old, according to the Syndicated Network Television Association. That compares with 49 for the major broadcast networks.

"Syndication is daytime," says SNTA President Mitch Burg. "We're doing 65% of the [broadcast] programming hours, and we're the only vehicle outside the network [daytime] dramas that pull a rating."

An increase in those ratings among younger women is also welcome news for syndication. For two decades, the daytime audience has been migrating to cable, whose share of the audience grew from 38% in the 1998-99 season to 49% in 2002-03.

"Where it used to be a given that we would get those viewers, now we have to work to get them back," says Bruce K. Rosenblum, executive vice president of research at Warner Bros. Domestic Television Distribution. "*Oprah* has been successful at doing that, and *Dr. Phil* has also been successful at bringing young, upscale women back from cable."

That may partly explain the dramatic 17.3% increase in ad



The Ellen DeGeneres Show is among the shows helping daytime's demographics.

spending on national syndication for the first three quarters of this year. Expenditures surged to nearly \$2.9 billion, according to data released last week by TNS Media Intelligence/CMR.

Advertisers Opting In

"[Syndication] is a great outlet for advertisers," says Peter Butchen, senior vice president and group director of national television at Initiative. "Syndicated daytime talk shows are, in aggregate, a competitive set to the three broadcast networks. And it's much higher-rated than most cable programs."

Due partly to the uptick in viewing among young women, long-time advertisers and new ones are tip-toeing into syndicated daytime programs.

"Traditionally, we've had packaged goods and pharmaceuticals, which continue to be key supporters," says Amy Carney, executive vice president of advertiser sales at Sony Pictures Television. "But there are also fast-foods and theatricals. And in recent years, we've seen a lot of growth in other categories, like credit cards, automotive, and cosmetics."

Michael Teicher, executive vice president of media sales at Warner Bros. Domestic Television Distribution, says categories like wireless telephones are driving up spending by chasing after the younger, more affluent viewers coming into syndication.

"Some new advertisers are coming in due to a greater level of education," he says. "The reality has set in that our programs are extremely competitive versus network programs and can certainly deliver higher ratings than virtually all of cable."—K.D.

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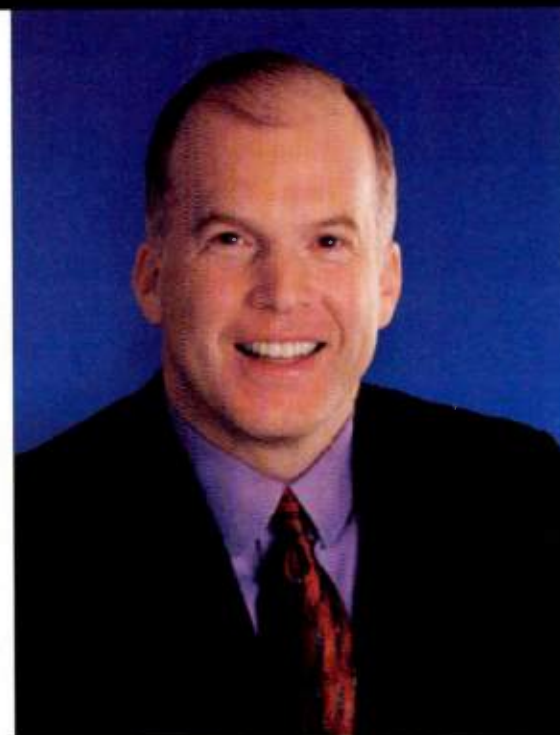


INSIDE

Overview: Playing It Forward 2B
The New Interactive Spin 2B
Programming to Win 4B

Reinvention Of a Channel

GSN HAS BEEN IN OVERHAUL MODE EVER SINCE RICH CRONIN TOOK THE HELM



GSN president and CEO Rich Cronin is spearheading the network's transformation.

DRIVING INTO THE GARAGE AT 2150 COLORADO AVENUE, THE SANTA Monica headquarters for GSN, something is noticeably askew about the signage at the front of the building. After a nearly yearlong, multimillion dollar marketing and promotional effort to rebrand the network and change its name, passersby still see the moniker "Game Show Network."

"When the building changes some other things, then we'll get a chance to change that," says GSN president and CEO

BY JANICE RHOSHALLE LITTLEJOHN

Rich Cronin during lunch at a nearby restaurant. "They won't change it unless you pay them way too much money. So we're waiting for the next round of changes."

While Cronin awaits the changes on the outside, he's already spearheading the network's transformation within. Though GSN celebrates its 10-year anniversary this month, many insiders believe the birth of the network really began in May 2001, when Cronin took the top position.

FORMIDABLE OWNERS

At the time, it seemed clear that a channel with two formidable owners known for their programming acumen — Sony Pictures Entertainment and Liberty Media Corp. — could do a little better than simply providing a hub for classic game shows.

From day one, Cronin has set his sights on expanding the network to include a broader gaming initiative with casino games, reality competition series, video game-based programs and interactive games — as well as doc-

umentaries on games and the people who play them.

"As a genre," Cronin notes, "game shows have more of a proven success than many, many others. If you look at the big categories of genres that have become networks, news and sports have certainly been around since the beginning of television. But if you look at the first years of television — even back to the late '40s — game shows were there." History, Cronin contends, is on GSN's side. And he's positioning the channel for growth not just in the U.S., but around the world.

Cronin, a veteran of two of the most globally minded media companies on the planet, News Corp. and Viacom Inc., says he saw the overseas opportunity for GSN right from the get go. "The other thing that I saw was that the people who worked at the network and the fans of the network were so passionate about games. And I think that's when a business works — when you have really passionate fans."

CONVINCING THE MSOS

But initially, GSN's MSO affiliates weren't exactly passionate about the gaming brand. "There was some speculation, sure," says Bob Gessner, president of Massillon Cable TV, which has carried the channel on its cable system since the late '90s. "There was a question of, 'Oh, wow, now there's a game show channel. What's next?'"

And many of those skeptics, says Dena Kaplan, GSN executive vice president of marketing, needed to be convinced that GSN was not simply going to continue along its original path as a channel that acquired old game show re-

See **REINVENTION**, page 88

TAKING ITV TO THE LIMIT

GSN GOES 24/7 WITH INTERACTIVITY

BY MATT STUMP

GSN has been a pioneer in two-screen interactivity among cable networks, sporting a schedule of 84 hours of interactive content each week.

It's about to increase the ante again, to as high as it can go. In first-quarter 2005, perhaps as early as the end of January, every minute of every show will offer two-screen interactivity, making it cable's first 24/7 interactive network. For those keeping scores, that's 168 hours per week, double the current number.

"We continue to try to lead the charge in this arena," says John Roberts, senior vice president, interactive and online at GSN, adding that the 24/7 commitment "is a huge thing for us."

And the linear, two-screen TV/PC experience isn't GSN's only area of interactivity. Its one-screen TV interactive platform, launched in Hawaii on Oceanic Cable, will likely spread to other cable systems in 2005, Roberts says. GSN also has launched applications on mobile short messaging service.

GSN has more than 2.5 million registered interactive users in its database, which in-



(L. to r.) Dave Stann, Kevin Blackwood and Rene Angelil on World Series of Blackjack.

cludes both TV and online content.

"These are loyal viewers that have built a community. It's really participation TV," Roberts says, adding that 500,000 viewers play

See **TAKING**, page 68

CREATIVE ARTISTS AGENCY

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GSN

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Racing for Ratings



GSN is expanding beyond game shows with fare like the eight-episode unscripted series *American Dream Derby*.

GSN TAKES ITS VISIBILITY TO THE NEXT LEVEL WITH NEW SHOWS

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Here at the historic Santa Anita Park in Arcadia, Calif., surrounded by picturesque palm trees in the foothills of the San Bernardino Mountains, 12 contestants from around the U.S. are vying for a

BY JANICE RHOSHALLE LITTLEJOHN

purse of \$250,000 and their own stable of thoroughbred horses, like the agile equine in this holding stable. Premiering Jan. 10, *American Dream Derby* chronicles these players as they experience the racing life, from slogging through the daily chores of life in the stables to living the high life of an owner in a nearby mansion to mastering the art of betting on the ponies in weekly "guts matches." These matches lead up to the final racing event, scheduled to air live on Feb. 21.

BROADENING THE PROGRAM BASE

GSN has spared no expense for the eight-episode unscripted series (including the purchase of its team of horses), and it's really no surprise. A lot is riding on the success of the series. As the recently rebranded "network for games," GSN is looking to expand its programming beyond the older-skewing retro game shows. It is adding other types of non-scripted gaming and documentaries that can bring more eyeballs, and broader audiences, to the channel.

"If you look out at the television landscape, there's all sorts of game programming going on," says Ian Valentine, GSN senior vice president of programming. "*Survivor* is a game. *American Idol* is a game. [And] since we're the network for games, it seems appropriate that we should be able to hold any kind of game that's being done on television on our air, whether as an acquisition or as an original production.

"*American Dream Derby*," Valentine adds, "is a little bit different than a proscenium game show [but] is certainly within the realm of game, of competition, of fun, of entertainment. It's a show that — if you enlarge the definition of games to include these reality games that are appropriate for GSN — fits our new brand very effectively."

Documentaries about games comprise another area of programming

that fits within the channel's revamped identity. The network has had some notable success with its run of two one-hour documentary specials, and this month releases the DVD of its sophomore documentary, *Video Game Invasion: The History of a Global Obsession*, which aired in March. It followed GSN's first documentary hit, *Big Bucks: The Press Your Luck Scandal*, which in March 2003 scored the highest ratings in the channel's history, averaging a 1.5 according to Nielsen Media Research data.

In the coming year, executives plan to take their commitment to docs much further. "Instead of doing a one-shot documentary that's a one-hour special, we're looking at doing documentaries that will be weekly series," says Rich Cronin, president and CEO of GSN. "We think it's more effective and efficient for us to do documentaries as series where we can examine all kinds of interesting elements about people and competitions."

In the three years since his arrival, Cronin has worked to bolster the network's profile with interactive game shows and reality shows like the popular *Extreme Dodgeball*, the buddy competition series *Kenny vs. Spenny* and the competitive spoofs *Who Wants To Be Governor of California?* and *National Lampoon's Greek Games*. The network also found a niche in card games with its blackjack franchise, including the *World Black Jack Tour*, *Celebrity Blackjack* and *World Series of Blackjack*.

Cronin will extend the casino play on Dec. 7 to include poker with the upcoming series *Poker Royale*, and several bar-room games are in the works. The network currently has a pilot on the table, *No Limit Nine Ball*, based on the popular poolroom game Nine Ball. Additionally, a micro-pilot is being shot, featuring actress Jasmine Guy, for a potential series around the card game Bid Whist, an African American tradition said to date back to the 19th century. Guy approached the network about doing the series on her favorite card game, which is a cross between Spades and Bridge.

A NETWORK WITH ALL KINDS OF GAMES

"We're looking at all kinds of games from card games, casino games, playground games, bar room games," Cronin says. "We're trying to find games and physical competitions that have the entertainment value and the interactive play-along that fit with our brand."

And so far, so good, according to Brad Adgate, research director for the advertising buying firm Horizon Media. He says GSN is seeing significant growth in its audience. Currently available to 56 million subscribers, its average number for homes tuned in during primetime has increased from 186,000 in the

See **RATINGS**, page 6B

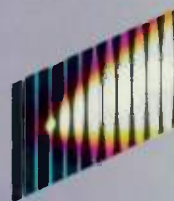
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Ratings

Continued from page 4B

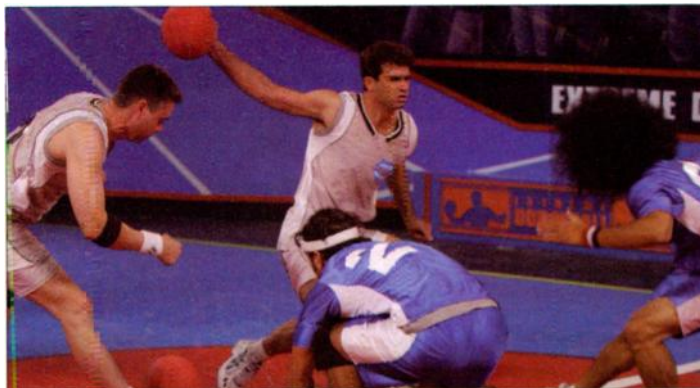
third quarter of 2003 to 253,000 homes for the same period this year. "That's pretty healthy growth in terms of household delivery," says Adgate.

He adds that secondary networks like Home & Garden Television, E! Entertainment or Comedy Central – those that haven't been around for 25 years but are in 80 million homes – have also grown rapidly. "But GSN is in a level beneath that. So I think it's imperative that they have that growth," he says.

Rick Kushman, television critic for the *Sacramento Bee* in Sacramento, Calif., believes that GSN's on-air programming choices are crucial at this juncture.

"GSN, it seems, is at something of a critical point, because they are now at that stage where, basically, they need to grow or die," Kushman says. "The thing that is really going to set them apart will have to be original, and it's hard to imagine anything in reality that's going to feel original. That's not to say that people wouldn't watch it, but it won't give them the kind of buzz they need."

Unlike a niche channel like Comedy Central, which has continually come up with unusual original comedy series like *South Park*, *The Daily Show with Jon Stewart*, *Chappelle's Show* and *Reno 911*, Kushman believes GSN will have a more difficult time latching on to a groundbreaking series "because they're sort of limited by their own niche," he says.



On Extreme Dodgeball, Armed Response, a team of real-life security guards, takes on the hip-hop themed Bling Team.

"It's really hard to do something groundbreaking and attention-getting and have it be a game, unless they start showing the NFL," Kushman adds.

Cronin obviously thinks GSN has pretty good odds. For the record, he says, "we're not going after NFL Football – we'll let the

others fight it out over that."

Instead, he and Valentine are gunning for Hollywood talent and providing a nurturing environment for diverse creative minds "to make sure GSN is their favorite place to do business," Cronin says.

This summer Cronin and crew teamed with producer Mark Cronin (no relation), creator of *The Surreal Life* and *Singled Out*, for three GSN series: *Who Wants to be Governor of California?*, *National Lampoon's Greek Games* and two

editions of *Extreme Dodgeball*.

By the fall, they'd re-teamed with producer Scott Stone for *American Dream Derby*. Stone had already worked with the network on *Mall Master*, and his reality credits also include *The Mole*, *Pop Stars*, *The Joe Schmo Show* and *The Man Show*.

GSN also re-upped with producer Andrew Golder, creator of *Win Ben Stein's Money* and *Star Search*, for the second season of *Celebrity Blackjack*.

"Increasingly people are [becoming] aware of the network," says Golder, who is developing another new show for the network. He adds that GSN offers "extremely competitive budget numbers" for shows the network believes in.

"On both a personal and production stand-point, that makes them a very attractive place to want to produce for," Golder says. "They are not a place where you're going to get grounded in the dirt about every penny. They have shown an ability and the desire to make the show and make the show right." ■

TEN YEARS AND STILL GROWING STRONG!

CONGRATULATIONS GSN!

TAKING ITV TO THE LIMIT

Continued from page 2B

along with GSN's on-air programming every month.

GSN will debut several new shows in January as part of the wider ITV launch. *Poker Royale* will feature top poker players playing in a league format. Viewers can play along at home and are eligible for a sweepstakes prize given out in the last episode. The prize could be as high as \$10 million, split between the contestant and a *Poker Royale* poker player if that player draws a full house.

GSN also will premiere its second *World Series of Blackjack* at the Golden Nugget on Jan. 21. Viewers can play along at home as a sixth player, seeing how they would do against the dealer on the screen.

Reality television also plays into GSN's schedule. *American Dream Derby* is a reality show premiering in January. Twelve people vie to hire a jockey to lead a horse to victory in a race at Santa Anita park. The winner takes ownership of the winning horse as well as all other horses in that race.

The casino shows are popular among ITV viewers, Roberts says. And the reality shows, although not necessarily play-along games, do have participation factors or polling elements that lend themselves to interactivity.

The network has 67 advertisers signed up for the interactive programming, and 85% of interactive viewers interact with the ads. GSN says 80% of its ITV players fall into the adults, 18-49, demographic, and 60% of its players are women.

On Sunday, Dec. 12, GSN will promote the interactivity in its primetime block front and center, Roberts says. GSN hosts will give away prizes live, as viewers aim to beat the on-air hosts in interactive games.

Roberts also says GSN continues to build out its Internet portal, home to a half-dozen games. Communities have sprung up, evidenced by the 1,500 people who regularly play Lingo Plus online in their own league.

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Reinvention

Continued from page 2

runs — including several from one of its owners, Sony.

"As we got out into the MSO community, they realized that it was a really engaging product," Kaplan recalls. "What separated the network [from the pack] was this notion that viewers could interact with it. And even though [GSN's] history was as an acquisition network — which seemed like maybe it was old — the fact that it was a network where we could engage our viewers made it fresh and different. And it was a very different position from all other networks. People could play along with game shows, unlike any other form of entertainment."

Cronin's new programming strategy was part of a larger game plan to relaunch the channel with a name change; both the new name and the new shows debuted last March. While keeping its vintage fare in daytime, the new GSN premiered a number of original primetime series — including *GSN's World of Blackjack*, *Fake-a-Date* and the buddy competition show



GSN is branching into billiards with *No Limit Nine Ball*, featuring top players like female pool pro Lissa Pallo.

Kenny vs. Spenny — along with a handful of acquired programs like *Star Search*, *Dog Eat Dog* and *Street Smarts*.

"Whenever you take a move to reinvent your network, that's a bold move," says Steve Moskow, president of Sony Pictures Television. "I think [the executive team] was quick to identify that they needed to do this."

"The challenge, and that's true with any cable network,

is [identifying] your tent pole shows," Moskow adds. "They've had a nice amount of success with some of the new shows they've put on, but the challenge is going to be finding those one or two shows that really define what the network is going forward."

INTERACTIVE EDGE

One of the channel's greatest assets heretofore has been its ability to cross over into other media, say many insiders, particularly because of its interactive thrust. Currently, the GSN Interactive online division programs 77 hours of ITV.

The network will continue to roll out casino and reality-based gaming series, notes Ian Valentine, senior vice president of programming. Additionally, it will make an aggressive push by adding interactive elements to its blackjack franchise and upcoming poker series, as well as other new series in development like the pool room gaming project *No Limit Nine Ball*.

GSN will launch a major interactive initiative on Dec. 12 with a three-hour evening block called *You Win Live*, featuring programming from the GSN acquisition library of *Who Wants To Be A Millionaire?*, *Win Ben Stein's Money* and *The Weakest Link*. The idea, Valentine says, is to make viewers aware of how easy it is to play along.

"GSN is a very unique network programming opportunity," says Bill Fitzgerald, senior vice president of Liberty Media.

He believes it is in a category by itself, because it makes such a concerted effort to en-

gage its audience with interactivity. "There is a fantastic opportunity for GSN to leverage its presence in the game space today, and take what it has learned from the interactive initiatives, and broaden those to create a much greater participation level of its audience base tomorrow."

These interactive efforts also offer significant benefits to affiliates as well, GSN's Kaplan contends.

"The other wonderful thing from an affiliate standpoint is that we can track who's playing along, whether they have a cable modem or not," she explains. "So we can do marketing with affiliates from our database of game registrants and help sell up — whether it's high-speed service or an upgrade to digital. So it's a great marketing tool for the network."

The prizes that GSN awards add another benefit, she says. "The more you play, the more you win. And we share the credit with the operators," she adds. "So it's really a win-win for GSN and our affiliates."

THE INDEPENDENT FACTOR

Because GSN is one of the few remaining independent channels — albeit with two pretty powerful owners — it has added advantages, Cronin says.

"Our affiliates and our advertisers love to support independents, because they don't like to be victims of the leverage of the big guys," Cronin explains. "They want us to succeed because they would like to have more competition on the programming side, so that has helped us."

Being independent both provides and demands flexibility, Kaplan says. "We have

to be that way partially because we are an independent. And we have to do things faster and better because of that."

She adds that from a marketing standpoint, it can be tough, because the channel doesn't have the luxury of calling on a sister network to cross-promote its shows.

"We've got to be very clever about how we launch our shows and maximize press — of finding the angles. And that, I think, gives the network and our culture a very entrepreneurial spirit," adds Kaplan.

Independence doesn't appear to be a weakness, says Brad Adgate, research director for the media-buying firm Horizon Media.

"I think they're doing OK so far being independent," Adgate says, noting that GSN currently has a U.S. household penetration rate of 51.5%, a percentage that has increased continuously since 1999.

"If you're in 56 million homes, and you've only been measured by Nielsen [Media Research] for about five and a half years, that's not bad. So it can be done. You've gotta have hope for these guys."

NEW RIVALS


Optimism at the channel runs deep, even as new channels like Edge TV seek to make a move on GSN's gaming territory.

"There are several new networks out there that are really niche networks, because they're really focused on just one genre," Cronin says. "There are a couple of networks out there that are focused on casino games, another focused on video games, networks that are focused on reality — whether they've started already or they're going to be launched."

"We are offering all kinds of games," he adds. We're much more broad-based. Our competition is other networks that are in 50 to 70 million homes — in terms of competition for viewers, competition for advertisers, competition for more distribution. That's who we look at, not start-up networks."

Cronin sees the competition on other fronts as well — as consumers are lured by other Internet sites and options like Sony Corp.'s PlayStation gaming console.

It's not easy, he says, "but we're in the fun business, so we're having fun." ■



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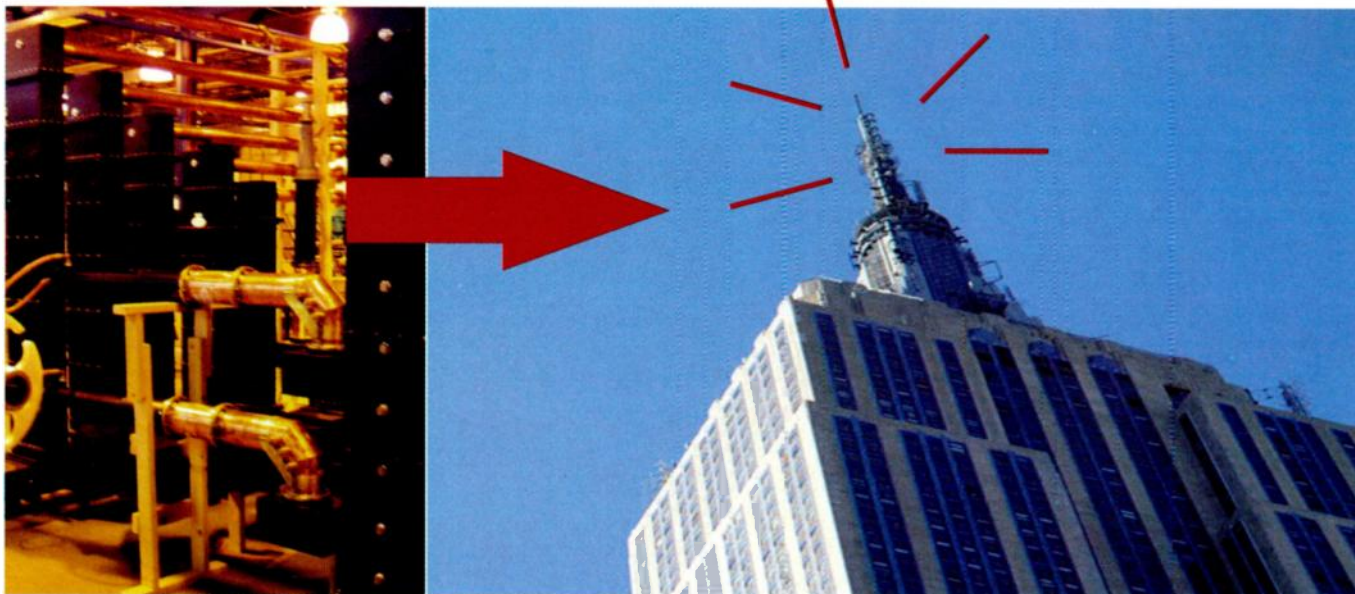
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Broadcasters Pull Together

CBS helps five New York stations return to DTV broadcasts **By Ken Kerschbaumer**



A six-DTV-channel combiner (left) helps multiple stations broadcast from the Empire State Building.

For the first time since 9/11, five New York City broadcasters will begin full-power, over-the-air DTV broadcasts. That's thanks to CBS, which is letting competitive stations transmit their signals through its Empire State Building antenna.

WABC, WNBC, WWOR, WPIX and WNET lost their DTV facilities when the World Trade Center was destroyed. With available real estate atop the Empire State Building and WCBS willing to grant access to its DTV antenna, the stations decided it was a logical place to build DTV facilities.

"The [new facility] is a tribute to the engineering and construction crews that have worked overnight 1,300 feet above the ground for two years," says Dave Davis, WABC New York general manager. "Lawyers arguing in a room is one thing, but the credit really goes to the engineers."

Indeed, this massive DTV project has been in the works more than two years.

The key physical complements are two signal combiners from Dielectric. The six transmission signals are fed into the combiner on the 85th floor, filtered, then output to the antenna and subsequently to viewers.

Getting the combiner in place was only one of many issues that had to be addressed. A radio transmitter for a small FM station had to be moved down the hall, a process that proved more difficult than initially believed. Then the negotiations with the building for transmitter space—as well as preparing the upper floors with backup power,

electric and fire suppression—took additional time. Finally, to seal the deal, all stations had to agree to vote on how they would handle potential conflicts, such as interference or when to switch to the backup system.

"In general, it hasn't been technology issues that have been the long-lead items," says Bob Seidel, CBS vice president, engineering technology, who headed up the project. "It's been negotiations, agreements and lawyers that have affected our pacing."

The groundwork for the system was actually laid in 1997, when WCBS was putting its DTV antenna in place. After consideration, it decided to put a multi-purpose antenna in place so it could operate different frequencies from one antenna.

"Since we knew we were going to be a very early adopter of DTV in New York, it made sense to put one up that would be broadband-capable," says Bob Ross, CBS senior vice president, East Coast Operations. "We also knew it wouldn't be easy to erect the antenna. This way, we could put it up once and use it forever."

A big boost to WCBS was that it already had a five-bay antenna in place at the Empire State Building. That one was taken down and replaced with a two-bay antenna, freeing up three bays for the multichannel UHF antenna that is now home to the majority of New York's DTV signals.

Work, however, didn't begin until the stations sorted out their analog-transmission problems following 9/11. WABC, for example, has an analog and digital

transmitter located at 4 Times Square. Those transmitters will now serve as backup; WABC will move its primary analog transmission to the Empire State Building. WABC's system, like those of the other four broadcasters, was less than ideal in terms of market coverage. That left the stations open to WCBS' proposal to share antenna space.

"The answer came back yes, and that was the beginning of a pretty long series of negotiations with Empire and [the stations]," says Ross. Deals were struck, with costs split equally among the six stations.

This week, low-power tests will measure performance and ensure that the antenna can handle the move to high power. The week of Dec. 13, the facility will be up and running to accommodate some high-power testing, although not all stations have finished installation of their transmitters. Davis says WABC will be at full power by the end of the year. "For the first time since 9/11, we'll be able to broadcast at our full licensed power."

The end of the project actually has

For the first time since 9/11, we'll be able to broadcast at our full licensed power."

DAVE DAVIS, WABC NEW YORK

ramifications outside of New York.

Throughout the project, WCBS(DT) signed off at midnight to accommodate workers. The problem: WCBS(DT) is used by DirecTV to serve the entire nation. "At midnight, the country goes dark. Once the work is completed," says Seidel, "we'll be 24/7." ■

TECH Q&A

The Next Generation

Warner Bros. is banking on HD-DVD

Last week, four major Hollywood studios, Warner Bros., Universal, Paramount and New Line, announced they would be rolling out high-def DVDs by the end of 2005. They selected the HD-DVD format, the one with less disc capacity but cheaper replication costs than its higher-capacity Blu-Ray sibling. Chris Cookson, Warner Bros.' president, technical operations, and CTO, Warner Bros. Entertainment, discussed the studio's decision with *B&C's* Ken Kerschbaumer.

Do you think HD-DVD will win out over Blu-Ray, its competitor?

It's just a question of time. We've done our analysis [of the formats], and HD-DVD meets our needs.

Will you make content available in the Blu-Ray format?

We don't have any plans to do anything other than HD-DVD.

How easy will it be to ramp up production?

We're going to have to set up new authoring capability because it has new interactive features and a new codec that are different from conventional DVDs. But once the authoring is done, getting it mastered and produced on plastic is pretty straightforward. It can be done with minimal conversion.

This seems like a big step forward in terms of HD traction. What's the ripple effect for program producers?

We've been preparing for HD for a number of years. We have thousands of episodes of TV series that were produced over the last several years that are able to be reissued or released for television and DVD in high-def. We've been anticipating this for quite a while, and we look forward to the market developing.

Do you think HD-DVD will help HD-set sales?

If people get an opportunity to watch movies in HD, they'll find it exciting. It's just a question of prices coming down. We're watching a lot of things in HD that look so much better than in SD.

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Medical Investigation

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The West Wing

Shine Makes Fox News Glow

Executive producer keeps FNC's prime time lineup hot **By John M. Higgins**

FIFTH ESTATER

Bill Shine's first job at Fox News was to break Sean Hannity and Alan Colmes of their bad habits. The two may be top cable news attractions today, but in 1996, Hannity and Colmes came to Fox News as accomplished veterans of talk radio. Unfortunately, good radio often makes bad television.

Shine's initial task as the producer of *Hannity & Colmes* was simple: Put the two hosts in suits and makeup. But getting them camera-ready was another matter. They kept tapping pens on the desk and looking at the wrong camera; they were also unable to read a teleprompter. And forget about time cues.

"I was awful," Hannity says, admitting he felt paralyzed by the camera for weeks.

The upside? With just 17 million subscribers at the time, the network wasn't on anyone's radar. "Back then, you could make a mistake," Shine says. "No one was watching. It's not like now. There were no bloggers."

But fixing *Hannity & Colmes* was just the beginning for Shine. Today, he is the executive producer for Fox's entire prime time schedule, in charge of the network's three biggest shows: *Hannity & Colmes*, *The O'Reilly Factor* and *On the Record With Greta Van Susteren*. His top priority is ensuring the bookings, pace and topics stay hot. That means covering a wide range of stories, from abuses in Iraq's oil-for-food program to the Scott Petersen murder trial.

"It's 100 variables that make a good TV show," says Shine. "It's the emotion and the questions. It's the order of the questions. It's not just the temperament of the host." Yet despite his success, Shine's primary role is to keep the shows running smoothly. "[Fox News Chairman] Roger Ailes and others decide what's in the time slot. Then they give it to me."

From the beginning of his career, Shine was adept at getting his foot in the door. Raised on Long Island, N.Y., the son of a New York City police officer, Shine embarked on a job hunt after graduating from college in 1985, armed only with a communications degree from SUNY Oswego. Rejected from a low-level job at WLIG(TV), the only commercial station on Long Island, he wondered, "What if I start working for free?"

That philosophy landed him a job as a production assistant on the independent station's magazine show and, eventually, a salary. Within a year, Shine was

directing WLIG's 10 p.m. newscast. There was still plenty of lower-level work for Shine to do, as the channel's schedule was heavy with old movies and local sports. "Setting up lights in a bowling alley on Sunday morning will give you character," he says. The station also lent him to Long Island's public station, WLIW, which led Shine to move to the PBS affiliate full time, where he met his future wife, Darla Seneck.

By 1995, cable TV came calling.

Executives at a Manhattan-based startup network, Newstalk, were impressed by a debate show Seneck had

worked on; they called while she and Shine were on their honeymoon

to offer her a job. She tipped Shine to another post, producing and directing a late-night show on a fringe network.

Though owned by Multimedia, a TV-station group and syndicator of then daytime staple *Donahue*, Newstalk was fairly primitive. The late-night show regularly tapped New York City talk-radio hosts. Occasionally, it ventured beyond New York's borders. Lacking any money for facilities or satellite hookups, Newstalk would have the talent phone in to New York for a couple of hours, air the audio and picture the host. Sometimes, hosts from different cities would call in and debate.

That's how Shine first met Hannity.

The Atlanta-based talk-radio host periodically flew up to make the rounds of other New York-based talk shows and to fill in for Newstalk hosts. As Ailes was prepping to launch the channel in 1996, he offered Hannity a prime time slot. Hannity liked Shine and encouraged him to apply for a job.

Although the conservative Hannity and liberal Colmes were initially positioned to host a debate knock-off of CNN's *Crossfire*, Shine says his aim was "to do everything the opposite. *Crossfire* was inside-the-Beltway; we would be outside. They shot against a black curtain; we went light. Their hosts threw shots at each other; ours didn't."

Hannity says Shine's view of the show always matched his. "He had great control," he says. "We are both fiercely competitive. We both wanted to win." Their first guest: the little-known governor of Vermont, Dr. Howard Dean.

Today, Fox News is no longer the underdog fighting CNN. The network has trounced CNN in cable news, and Shine's prime time slate has nearly doubled during the fall season, fueled by excitement over the election. But the network and Shine's hosts in particular are often attacked by Democrats and some journalists. They charge Fox News with either slanting coverage to support the Bush administration or providing a home for shouting matches rather than insightful discussion. Shine bristles at such criticism.

"People who say that, in my opinion, don't watch us or don't watch us closely. Sean, Alan or O'Reilly? Some days, some segments, sure. But look at our daytime schedule and tell me that exists. Look at our White House group. Are you going to tell me they're screamers?" ■



BILL SHINE

Vice president of production, network executive producer, Fox News

B. July 4, 1963, Brooklyn, N.Y.

EDUCATION

BA, State University of New York, Oswego, 1985

EMPLOYMENT

WLIG: director, 1985-1987; WLIW: producer/director, 1987-95; Newstalk: producer/director, 1995-96; Fox News: producer *Hannity & Colmes*, 1996-98; prime time senior producer, 1998-99 executive producer, prime time, 1999-2000; network executive producer, 2000-03; current position since 2003

PERSONAL

Married; two children

FATES & FORTUNES

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JAMES ANSIN, director, marketing, WSVN Miami, named VP/station manager.

At WBBM Chicago: **JOEY PORCELLI**, Cleveland, local sales manager, WOIO Shaker Heights, Ohio/WUAB Lorain, Ohio, joins as local sales manager; **GINA LABANCO**, VP/client supervisor, Zenith Media, Chicago, joins as account executive; **SHAWN ADAMS**, local sales manager, WVEC Norfolk, Va., joins as account executive.

PROGRAMMING

MAREN CHRISTENSEN, senior VP, intellectual property counsel, Universal Studios, Los Angeles, promoted to executive VP/general counsel.

JAYSON DINSMORE, director, alternative programs, NBC Enter-



Betsy Frank
Viacom

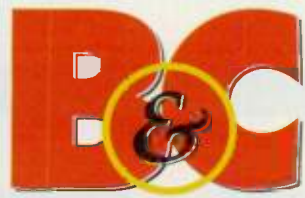
tainment, Los Angeles, named VP.

BETSY FRANK, executive VP, research and planning, MTV Networks, New York, named executive VP, research and planning, cable networks, film and publishing, Viacom, New York.

Promotions at NBC Universal research team, New York: **SARI DECESARE**, VP, audience measurement, to senior VP, network and cable entertainment research; **NANCY GALLAGHER**, VP, news, sports and affiliate research, to senior VP, news, sports, network and cable affiliate research; **HORST STIPP**, VP, primary and strategic research, to senior VP; **RANDI SCHNEIDER**, senior director, network entertainment research, to VP, network broadcast and entertainment research.

MEL (MELODY) FAYE HANNA, director, global compensation, Scientific-Atlanta, Lawrenceville, Ga., named VP, compensation, benefits and HRIS, The Weather Channel, Atlanta.

At Court TV, New York: **MARLENE DANN**, VP, daytime



**A SPECIAL SERIES ON
LEADING CABLE OPERATORS
AND TV-STATION GROUPS**



CLOSE UP

Broadcasting & Cable will profile Station Groups and Top MSOs in a series of special reports. On December 20, we'll provide an in-depth report on NBC-Telemundo Station Groups. We'll analyze the company's strategies for success and provide insight from key executives, competitors and analysts, and we'll look ahead to see how new technology fits into their future.

B&C CLOSE UP

January	Cox Cable and Cox Television Group
February	Viacom Station Group
March	Belo Corp.
April	Insight Communications
May 31	Gannett
June 28	ABC Television Group
July 26	Fox Station Group
August 30	Comcast Communications
September 27	Tribune Television Group
October 25	Sinclair Television
November 29	DIRECTV
December 20	NBC - Telemundo Station Groups



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December 20, 2004

SPACE CLOSE:
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MATERIALS CLOSE:
December 14, 2004

World Radio History

THE BUSINESS OF TELEVISION



BROADCASTING & CABLE

division, named executive VP, daytime programming; **ALLISON RADZIN**, VP, creative concept development, Guild Group, White Plains, N.Y., named VP, advertising sales



Melody Faye Hanna
The Weather Channel

marketing, Court TV, New York.

At ESPN: **DAVID BERSON**, VP, program planning and promotion, promoted to senior VP, programming and acquisitions; **TRAUG KELLER**, president, ABC Radio Networks, named senior VP, ESPN Radio and ESPN Deportes.

JOURNALISM

MONICA CROWLEY, foreign affairs and political analyst, Fox News Channel, New York, joins MSNBC, Secaucus, N.J., as contributor and analyst.

ROB ELGAS, anchor/producer, KVIA El Paso, Texas, named co-anchor, 6 and 9 a.m. Saturday newscasts, WMAQ Chicago.

ROBERT LYLES, reporter,

KCTV Kansas City, Mo., joins WCAU Philadelphia as general assignment reporter.

LARRY RAMIREZ, sports reporter, WJXT Jacksonville, Fla., named weekday sports anchor and reporter, KSAT San Antonio.

JAVIER SOTO, morning anchor/reporter, KPVI Pocatello, Idaho, named reporter, KTVK Phoenix.

SHELLY SLATER, anchor/reporter, WSAZ Charleston/Huntington, W.Va., joins WDAF Kansas City, Mo., as reporter.

JAMIE KRUMHEUER, weekend meteorologist, WDTN Dayton, Ohio, joins KSHB Kansas City, Mo. as meteorologist.

TIMYKA ARTIST, reporter, WTOL Toledo, Ohio, joins WTAE Pittsburgh as reporter.

TOM ROUSSEY, reporter, WBBH Ft. Myers, Fla., moves to WBTV Charlotte, N.C., as general assignment reporter.

ANNIE BLANCO, anchor/



Alison Radzin
Court TV

reporter, News 24, Houston, named nightside reporter, KTNV Las Vegas.

MARISA MENDELSON, reporter, WHBF Rock Island, Ill., becomes reporter, WOI West Des Moines, Iowa.

MICHELLE BROWN, reporter/anchor, WGGB Springfield, Mass., joins WJAR Providence, R.I., as general assignment reporter.



James Ansin
WSVN

RADIO

BETH FREED, director, Eastern radio sales/Radio Disney, New York, named manager, national sales and marketing, Jones MediaAmerica, New York.

ADVERTISING/MARKETING/ PR

At BBDO: **MARCUS KEMP**, worldwide creative director, Intel/managing director, Euro RSCG, joins BBDO Atlanta as vice chairman and chief creative officer; **TROY RUHANEN**, executive VP/managing director, Leo Burnett Worldwide, Sydney, Australia, joins BBDO

North America, New York and Atlanta, as executive VP/managing director.

DAVID LEHANSKI, VP, marketing solutions, Clear Channel Advantage, named VP, associate director, creative solutions, Clear Channel Katz Advantage, New York.

JORDAN HARRIS, senior VP/group director, MediaCom, Middletown, N.Y., named director, sales and marketing, Syndicated Network Television Association, New York.

TECHNOLOGY

DAVID MICEK, president, AltaVista, Andover, Mass.,



Cristina Mancini
Twentieth Television

named chief operating officer, Eagle Broadband, Houston.

ALLIED FIELDS

MICHAEL DESCOTEAU, director, sales, venue services group, National Mobile Television, White Plains, N.Y., named director, broadcast services, Masque Sound, East Rutherford, N.J.

NEWSMAKER LUNCHEON REALITY TELEVISION 2004 Regent Beverly Wilshire Hotel, Los Angeles. Contact: 818-789-1182 or info@hrts.org

DEC. 11 TELEVISION NEWS CENTER NEWSCAST PRODUCER/WRITER TRAINING Ventana Productions, Washington. Contact: Herb Brubaker 301-340-6160 or hmbrubaker@televisionnewscenter.org

DEC. 16 INTERNATIONAL RADIO AND TELEVISION SOCIETY HOLIDAY BENEFIT LUNCHEON Marriott Marquis, New York. Contact: Marilyn Ellis 212-867-6650 x306 or www.irts.org

DEC. 16 NEW YORK WOMEN IN FILM & TELEVISION 2004 MUSE AWARDS FOR OUTSTANDING VISION AND ACHIEVEMENT New York Hilton, New York. Contact: Kim McDade 212-986-7080 or kim@lippingroup.com

DEC. 18-19 TELEVISION NEWS CENTER REPORTER TRAINING Ventana Productions, Washington. Contact: Herb Brubaker 301-340-6160 or hmbrubaker@televisionnewscenter.org

JANUARY 2005

JAN. 6-9 CONSUMER ELECTRONICS ASSOCIATION 2005 INTERNATIONAL CONSUMER ELECTRONICS SHOW Las Vegas. Contact: www.ce.org

JAN.11-13 SOCIETY OF CABLE TELECOMMUNICATIONS ENGINEERS CONFERENCE ON EMERGING TECHNOLOGIES Huntington Beach, Calif. Contact: www.scte.org

JAN. 25-27 THE NATIONAL ASSOCIATION OF TELEVISION PROGRAM EXECUTIVES NATPE 2005 CONFERENCE AND EXHIBITION Mandalay Bay Resort,

Call for Entries



The American Legion 2005 Fourth Estate Award Competition

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DATEBOOK

DECEMBER

DEC. 6 - 8 REED TELEVISION GROUP HISPANIC SUMMIT Marriott Marquis, New York. Contact: Sandy Friedman 646-746-6740

DEC. 8 THE HOLLYWOOD RADIO AND TELEVISION SOCIETY



P E O P L E

Las Vegas. Contact: 310-453-4440 or www.natpe.org

JAN. 26-28
CABLE & TELECOMMUNICATIONS ASSOCIATION FOR MARKETING RESEARCH CONFERENCE 2005
Sonesta Beach Resort
Key Biscayne, Fla.
Contact: 703-549-4200 or www.ctam.com/conferences

FEBRUARY

FEB. 10-13
RADIO ADVERTISING BUREAU RAB 2005
Hyatt Regency,
Atlanta. Contact:
www.rab2005.com or
800-917-4269

FEB. 21-22
ENVIRONMENTAL TECHNOLOGY ALLIANCE COLLABORATIVE CONFERENCING SUMMIT
Waldorf-Astoria, New York. Contact: 917-655-0818 or www.ccsexpo.com

FEB. 24-26
AMERICAN WOMEN IN RADIO & TELEVISION ANNUAL LEADERSHIP SUMMIT & BUSINESS CONFERENCE
Key Bridge Marriott,
Arlington, Va.
Contact: 703-506-3290 or
www.awrt.org

MARCH

MARCH 13
ACADEMY OF TELEVISION ARTS & SCIENCES COLLEGE TELEVISION AWARDS
The Renaissance Hotel,
Hollywood, Calif. Contact:
Academy of Television
Arts & Sciences 818-754-2800 or www.emmys.com

APRIL

APRIL 3-5
NATIONAL CABLE & TELECOMMUNICATIONS ASSOCIATION THE NATIONAL SHOW
The Moscone Center, San Francisco. Contact: NCTA Industry Affairs
202-775-3669 or
www.thenationalshow.com

APRIL 3-5
THE NATIONAL CABLE & TELECOMMUNICATIONS ASSOCIATION 2005 VANGUARD AWARDS

The Moscone Center,
San Francisco. Contact:
www.thenationalshow.com
or 202-775-3669;
Nominations: Michelle
Ray 202-775-3669 or
mray@ncta.com

APRIL 14-15
SOCIETY OF CABLE TELECOMMUNICATIONS ENGINEERS CHAPTER LEADERSHIP CONFERENCE 2005
Location: TBD. Contact:
www.scte.org

APRIL 16-21
NATIONAL ASSOCIATION OF BROADCASTERS NAB 2005
Las Vegas Convention Center, Las Vegas. Contact:
www.nab.org

APRIL 18-20
THE RADIO-TELEVISION NEWS DIRECTORS ASSOCIATION RTNDA@NAB
Las Vegas. Contact: Rick Osmanski 202-467-5200 or
ricko@rtnda.org

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DEALS

TVs

KRCG JEFFERSON CITY, MO.

PRICE: \$38 million
BUYER: Pilot Group LP (Paul M. McNicol, senior vice president)
SELLER: Mel Wheeler Inc. (Leonard Wheeler, president/COO)
FACILITIES: Ch. 13, 316 kW, ant. 1011 ft.
AFFILIATION: CBS

COMBOS

KOYE(FM) FRANKSTON, KOOI(FM) JACKSONVILLE, KFRO(AM) AND KYKX(FM) LONGVIEW AND KKUS(FM) TYLER (TYLER-LONGVIEW), TEXAS

PRICE: \$26 million
BUYER: Access.1 Communications, (Chesley Maddox-Dorsey, president/director); owns 14 other stations, none in this market
SELLER: Waller Broadcasting Inc. (Dudley Waller, president/CEO)
FACILITIES: KOYE(FM): 96.7 MHz, 50 kW, ant. 492 ft.; KOOI(FM): 106.5 MHz, 100 kW, ant. 1480 ft.; KFRO(AM): 1370 kHz, 1 kW; KYKX(FM): 105.7 MHz, 100 kW, ant. 1155 ft.; KKUS(FM): 104.1 MHz, 50 kW, ant. 492 ft.
FORMAT: KOYE(FM): Mexican; KOOI(FM): AC; KFRO(AM): News/Talk/Sports; KYKX(FM): Country; KKUS(FM): Country
BROKER: Doug Ferber of Star Media Group Inc.

WLCS(FM) NORTH MUSKEGON, WUBR(AM) AND WEFG(FM) WHITEHALL, WSHN(FM) HOLTON (MUSKEGON), NEW (FM)(CP) NEWAYGO, MICH.

PRICE: \$3.8 million
BUYER: Citadel Broadcasting Corp. (Farid Suleman, chairman/CEO); owns 217 other stations, including WSHN(FM) Muskegon
SELLERS: WLCS(FM), WUBR(AM) and WEFG(FM): Unity Broadcasting Inc. (Donald Noordyk, president); WSHN(FM): Noordyk Broadcasting (Don Noordyk, president); NEW (FM)(CP): Donald James Noordyk
FACILITIES: WLCS(FM): 98.3 MHz, 2 kW, ant. 456 ft.; WUBR(AM):

1490 kHz, 1 kW;
WEFG(FM): 97.5 MHz, 2 kW, ant. 427 ft.; WSHN(FM): 100.1 MHz, 3 kW, ant. 472 ft.; NEW(FM)(CP): 92.5 MHz, 2 kW, ant. 543 ft.
FORMAT: WLCS(FM): Oldies; WUBR(AM): Adult Standard; WEFG(FM): Country; WSHN(FM): Top 40; NEW(FM)(CP): CP-NOA

WICE(FM) CLARKSVILLE, WSHV(AM) AND WKSK(FM) SOUTH HILL, VA.

PRICE: \$2.5 million
BUYER: Lakes Media LLC (Thomas C. Birch, president); owns no other stations
SELLER: Joyner Radio Inc. (A. Thomas Joyner, president/treasurer)
FACILITIES: WICE(FM): 98.3 MHz, 18 kW, ant. 390 ft.; WSHV(AM): 1370 kHz, 4 kW; WKSK(FM): 101.9 MHz, 6 kW, ant. 315 ft.
FORMAT: WICE(FM): Oldies; WSHV(AM): Gospel/Rhythm & Blues; WKSK(FM): Country
BROKER: Dick Kozacko of Kozacko Media Services

FMs

KKHR(FM) ABILENE, TEXAS

PRICE: \$684,000
BUYER: Canfin Enterprises Inc. (Parker S. Cannan); owns no other stations
SELLER: Powell Meredith Communications (Amy Meredith, president)
FACILITIES: 106.3 MHz, 50 kW, ant. 184 ft.
FORMAT: Tejano

AMs

WTOX(AM) GLEN ALLEN, WLEE(AM), WREJ(AM) AND WVNZ(AM) RICHMOND, VA.

PRICE: \$3.8 million
BUYER: Davidson Media Group LLC (Peter Davidson, president); owns 12 other stations, none in this market
SELLER: 4M Communications Inc. (Michael Mazursky, executive vice president)
FACILITIES: WTOX(AM): 1480 kHz, 6 kW day/2 kW night; WLEE(AM): 990 kHz, 1 kW day/13 W night; WREJ(AM): 1540 kHz, 10 kW; WVNZ(AM): 1320 kHz, 5 kW
FORMAT: WTOX(AM): Talk; WLEE(AM): Adult

Standard; WREJ(AM): Urban/Inspirational; WVNZ(AM): Spanish AC

WLRM(AM) MILLINGTON (MEMPHIS), TENN.

PRICE: \$400,000
BUYER: CPT&T Radio Station (Eric M. Westenbarger, president); owns no other stations
SELLER: World Overcomers Outreach Ministries Church Inc. (Alton R. Williams, president)
FACILITIES: 1380 kHz, 3 kW day/1 kW night
FORMAT: Religion

WNOO(AM) CHATTANOOGA, TENN.

PRICE: \$265,886
BUYER: East TN Radio Group III LP (Paul G. Fink, limited partner); owns no other stations
SELLER: Pye Broadcasting Inc. (Lionel F. Pye Jr., president)
FACILITIES: 1260 kHz, 5 kW day/25 W night
FORMAT: Gospel/Rhythm and Blues

WBIL(AM) TUSKEGEE, ALA.

PRICE: \$210,000
BUYER: Hand H Communications LLC (Fred R. Hughey); owns one other station, none in this market
SELLER: Willis Broadcasting Corp. (Levi E. Willis, president)
FACILITIES: 580 kHz, 500 W day/139 W night
FORMAT: Gospel
BROKER: Richard Hayes of Richard Hayes and Associates

WHAP(AM) HOPEWELL (RICHMOND), VA.

PRICE: \$200,000
BUYER: MainQuad Communications Inc. (Daniel Berman, owner/president); owns three other stations: WARV(FM), WBBT(FM) and WCUL(FM) Richmond
SELLER: 4M Communications Inc. (Michael Mazursky, executive vice president)
FACILITIES: 1340 kHz, 1 kW
FORMAT: Adult Standard

INFORMATION PROVIDED BY:
BIA Financial Networks' Media Access Pro. Chantilly, Va., www.bia.com

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NIELSEN NOV. 22-28 RATINGS

THE PRIME TIME RACE Top 10 Basic Cable Shows

Nov. 22-28

PROGRAM	DATE	NET	HHS
1. NFL: Packers vs. Texans	11/28	ESPN	7.2
2. WWE Raw 10p	11/22	SPIK	3.5
3. WWE Raw 9p	11/22	SPIK	3.4
3. NFL Prime Time	11/28	ESPN	3.4
5. Mv: The Bourne Identity	11/28	USA	3.4
6. SpongeBob SqrPants 5:30p	11/27	NICK	3.3
6. Fairly OddParents 10a	11/28	NICK	3.3
8. FOP Movie: Channel Chasers	11/26	NICK	3.2
8. SpongeBob SqrPants 6p	11/27	NICK	3.2
8. SpongeBob SqrPants 9:30a	11/28	NICK	3.2

PROGRAM	DATE	NET	HHS
1. NFL: Raiders vs. Broncos	11/28	ESPN	5.8
2. NFL Prime Time	11/28	ESPN	2.8
3. Mv: The Bourne Identity	11/28	USA	2.8
4. WWE Raw 10p	11/22	SPIK	2.6
5. WWE Raw 9p	11/22	SPIK	2.4
6. Real World XV	11/23	MTV	2.0
6. SportsCenter	11/28	ESPN	2.0
8. RW/RR Battle of the Sexes II	11/22	MTV	1.9
8. Sex and the City 9:35p	11/23	TBS	1.9
8. CSI 8p	11/22	SPIK	1.9
8. Mv: Men in Black	11/27	TBS	1.9

SOURCE: Turner Entertainment Research, Nielsen Media Research

Broadcast Networks

Nov. 22-28

	WEEK	STD
1. CBS	9.6	9.6
2. NBC	6.8	7.4
3. ABC	7.5	7.3
4. FOX	4.8	6.7
5. UPN	2.4	2.7
6. WB	2.8	2.9
7. PAX	0.4	0.5

	WEEK	STD
1. CBS	5.4	5.4
2. NBC	4.7	5.0
3. ABC	5.4	5.1
4. FOX	3.8	4.8
5. UPN	1.8	1.9
5. WB	1.8	2.1
7. PAX	0.2	0.2

Top 10 Broadcast Shows

	WEEK	STD
1. Desperate Housewives	ABC	17.6
2. CSI: Miami	CBS	15.7
3. CSI	CBS	14.8
4. Two and a Half Men	CBS	13.4
4. Everybody Loves Raymond	CBS	13.4
6. Without a Trace	CBS	13.1
7. 60 Minutes	CBS	12.7
8. Cold Case	CBS	12.5
9. Monday Night Football	ABC	11.6
10. Law & Order: Special Victims Unit	NBC	11.1

	WEEK	STD
1. Desperate Housewives Sun 9p	ABC	16.2
2. CSI	CBS	10.9
3. CSI: Miami	CBS	10.4
4. Extreme Makeover: Home Edition	ABC	9.7
5. Two and a Half Men	CBS	8.8
6. Without a Trace	CBS	8.2
7. Everybody Loves Raymond	CBS	8.0
8. Law & Order: Special Victims Unit	NBC	7.8
8. Monday Night Football	ABC	7.8
8. Survivor: Vanuatu	CBS	7.8

SOURCE: Nielsen Media Research

	abc	CBS	NBC	FOX	PAX	UPN	WB
MONDAY	8.6/13	11.2/17	6.4/10	4.7/7	0.1/1	2.4/4	4.2/6
8:00	70. Life of Luxury 3.8/6	24. Still Standing 7.3/11		56. Trading Spouses 4.9/7	112. Model Citizens 0.2/1	88. One on One 2.2/3	55. 7th Heaven 5.0/7
8:30		27. Listen Up 7.0/10	29. Fear Factor 6.8/10			86. Half and Half 2.3/3	
9:00		5. Everybody Loves Raymond 12.2/18		61. The Swan 4.5/7	115. World Cup of Comedy 0.1/1	80. Girlfriends 2.6/4	75. Everwood 3.5/5
9:30	9. Monday Night Football—New England Patriots vs. Kansas City Chiefs 10.6/17	4. Two and a Half Men 12.3/18				85. Second Time Around 2.4/4	
10:00		2. CSI: Miami 14.3/23	43. \$25 Million Hoax 5.7/9		115. Second Verdict 0.1/1		
10:30							
TUESDAY	6.4/10	7.9/13	7.4/12	3.2/5	0.2/1	2.0/3	3.9/6
8:00	43. My Wife and Kids 5.7/9	12. NCIS 9.4/15	35. The Biggest Loser 6.4/10	80. Rebel Billionaire 2.8/4	112. World Cup of Comedy 0.2/1	89. All of Us 2.1/3	
8:30	47. George Lopez 5.6/9					89. Eye 2.1/3	67. Samantha: An American Girl on Holiday 3.9/6
9:00	22. According to Jim 7.4/11	36. The Amazing Race 7.1/11		70. House 3.8/6	112. Cold Turkey 0.2/1	93. Veronica Mars 1.8/3	
9:30	31. Rodney 6.7/10		53. Scrubs 5.2/8				
10:00	34. NYPD Blue 6.5/11	24. Judging Amy 7.3/12	18. Law & Order: Special Victims Unit 10.1/17		115. Cold Turkey 0.1/1		
10:30							
WEDNESDAY	6.8/11	6.5/11	7.5/12	4.7/7	0.4/1	2.6/4	2.5/4
8:00		50. 60 Minutes Wednesday 5.5/9	35. Tim McGraw: Here and Now 6.4/11	65. That '70s Show 4.0/7	103. Doc 0.5/1	78. America's Next Top Model 2.9/5	83. WB Special Movie—A Walk To Remember 2.5/4
8:30	31. The Bachelor 6.7/11	40. King of Queens 6.1/10		77. Quintuplets 3.3/5			
9:00		52. Center of the Universe 5.3/9	21. The West Wing 7.5/12	76. American Idol: Home for Christmas '04 3.4/6	103. Sue Thomas, F.B. Eye 0.5/1	86. Kevin Hill 2.3/4	
9:30							
10:00	28. The Bachelor: After the Final Rose 6.9/12	18. CSI: NY 8.3/14	17. Law & Order 8.5/14		110. Early Edition 0.3/1		
10:30							
THURSDAY	4.1/8	11.4/21	6.9/13	5.7/10	0.5/1	2.6/5	1.5/3
8:00	67. Ch Brown Thanksgiving 3.9/8	14. Survivor: Vanuatu 8.8/17	54. Will & Grace 5.1/10		102. America's Funniest Home Videos 0.6/1		97. Samantha: An American Girl on Holiday 1.5/3
8:30				43. Fox Movie Special—Spiderman 5.7/10		80. WWE Smackdown! 2.6/5	
9:00	63. ABC Movie of the Week—Dr. Seuss' How the Grinch Stole Christmas 4.2/8	1. CSI 13.5/24	22. The Apprentice 7.4/13		108. Diagnosis Murder 0.4/1		
9:30		6. Without a Trace 11.9/22	19. The Seinfeld Story 8.2/15				
10:00							
10:30							
FRIDAY	4.3/8	6.8/12	5.9/11	4.7/7	0.4/1	1.5/3	1.9/3
8:00	59. 8 Simple Rules 4.6/8	51. Joan of Arcadia 5.4/10	43. Dateline NBC 5.7/10		103. America's Most Talented Kids 0.5/1	91. Enterprise 2.0/4	96. What I Like About You 1.6/3
8:30	72. Complete Savages 3.7/7			64. Fox Movie Special—Mr. Deeds 4.1/7		94. Grounded for Life 1.7/3	
9:00	62. Hope & Faith 4.3/8	37. JAG 6.3/11			108. MGM Night at the Movies—Rain Man 0.4/1	98. WWF Tough Enough Download 1.0/2	83. Reba 2.5/4
9:30	67. Less Than Perfect 3.9/7		41. Dateline NBC 6.0/11			91. Blue Collar TV 2.0/3	
10:00	57. 20/20 4.7/8	14. CSI 8.8/16					
10:30							
SATURDAY	6.4/11	6.0/11	3.6/6	4.7/8	0.2/1		
8:00		47. Cold Case 5.6/10		57. Fox Movie Special—Men in Black 2 4.7/8	110. Universal Family Movie—The Best of Times 0.3/1		
8:30			74. NBC Saturday Night Movie—It's a Wonderful Life 3.6/6				
9:00	37. ABC College Football—Notre Dame vs. USC 6.4/11	41. Crimetime Saturday 6.0/10					
9:30		33. 48 Hours Mystery 6.6/12					
10:00							
10:30							
SUNDAY	10.4/16	10.9/16	5.9/9	4.4/6	0.7/1		1.8/3
7:00	29. America's Funniest Home Videos 6.8/11	(nr) NFL Game 2 13.4/25		59. Fox Movie Special—Ice Age 4.6/7	103. America's Most Talented Kids 0.5/1		94. Steve Harvey Big Time 1.7/3
7:30		7. 60 Minutes 11.6/17	39. NBC Movie of the Week—Shrek 6.2/9		98. Doc 1.0/1		79. Charmed 2.7/4
8:00	11. Extreme Makeover: Home Edition 9.8/14	8. Cold Case 11.4/16		65. The Simpsons 4.0/6	101. Sue Thomas, F.B. Eye 0.9/1		98. Mountain 1.0/1
8:30			47. NBC Movie of the Week—A Christmas Carol 5.6/8	72. King of the Hill 3.7/5	103. Diagnosis Murder 0.5/1		
9:00	1. Desperate Housewives 16.1/23	13. CBS Sunday Movie—When Angels Come to Town 9.1/14					
9:30							
10:00	14. Boston Legal 8.8/14						
10:30							
Week	4.9/11	8.8/15	6.2/10	4.4/7	0.4/1	2.2/4	2.8/4
S-T-D	6.6/11	8.7/14	6.8/11	6.1/10	0.4/1	2.5/4	2.6/4

KEY: Each box in grid shows rank, program, total-household rating/share. Blue bar shows total-household rating/share for the day. Top 10 shows of the week are numbered in red. TV universe estimated at 109.6 million households; one rating point is equal to 1,096,000 U.S. TV homes. Tan tint indicates winner of time slot. (NR)=Not Ranked; rating/share estimated. *Premiere. Programs less than 15 minutes in length not shown. S-T-D=Season to date. SOURCES: Nielsen Media Research, CBS Research. Compiled by Kenneth Ray.

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We have an opening for a Reporter who is competitive, writes well, loves to tell good stories and does great live. A minimum of two years experience. If you are this person, please send your resume and tape to Personnel Administrator-205, WTOL-TV, P.O. Box 1111, Toledo, Ohio 43699-1111. No phone calls. EOE

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Media General Broadcast Group www.mgbg.com WIAT-TV is looking for a Senior Writer/Producer. CBS affiliate in Birmingham, Alabama (DMA 40) is seeking a hands on producer/editor with strong organizational and leadership skills. Position calls for a visually creative person with the ability to take a project from conception through to air and teach others to do the same. Duties include, but are not limited to, responsibility for news topicals/teases, station image, program promotion and supervision of promotion scheduling. Successful candidate should be a troubleshooter, problem solver, proficient with non-linear editing as well as shooting, college degree and 1-2 years experience as a writer producer. EOE M/F/D/V Drug Screen. If you have what it takes please send resume, tape, and references to: Human Resources, WIAT-TV, P.O. Box 59496, Birmingham, AL 35259. or email to hr@wiat.com. No phone calls please.

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WAVY-TV, the NBC affiliate in the Norfolk, Virginia market, is looking for an Investigative Producer. We want someone who has the experience to find the next IRE award-winning story and do what it takes to get it on the air. Experience in investigative journalism (print or broadcast) preferred, though those with investigative experience in other fields (law enforcement, military,) may be also be considered. Please send your resume, cover letter and copies of your recent work to: Gary Stokes, WAVY-TV, 300 Wavy Street, Portsmouth, VA 23704. No phone calls, please. EOE.

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ASSISTANT PROFESSOR

DEPARTMENT OF TELECOMMUNICATIONS BALL STATE UNIVERSITY - MUNCIE, INDIANA

Full-time, tenure-track position available August 19, 2005. Responsibilities include: teaching undergraduate and master's level courses; conducting research and/or creative production in digital media and multimedia. Teaching load is typically three courses per semester in the academic year depending upon scholarly productivity. **MINIMUM QUALIFICATIONS:** doctoral degree in telecommunications, mass media, or related field; ability to teach undergraduate and graduate courses in digital media, multimedia, and media writing and/or analysis and criticism; demonstrated potential to produce scholarly publications or creative works sufficient to be appointed to the graduate faculty. **PREFERRED QUALIFICATIONS:** Ph.D. in telecommunications or mass media; college teaching and advising experience; evidence of scholarly publishing; interactive television design and/or research experience. The Department of Telecommunications, which is one of four departments in the College of Communication, Information, and Media, has more than 1,000 majors and minors and is housed in state-of-the-art facilities with the latest high-end technology in classrooms and labs with additional facilities under construction. Located an hour northeast of Indianapolis, Muncie (population 70,000) benefits from one of the lowest cost-of-living indexes in the nation. Visit www.bsu.edu/tcom. Send letter of application, vita/resume, official transcript of highest degree earned, and the names and contact information for at least three references to: Dr. Alan Richardson, Chair, Search Committee, Department of Telecommunications, Ball State University, Muncie, IN 47306. Review of applications will begin January 10, 2005, and will continue until the position is filled. Ball State University is an equal opportunity, affirmative action employer and is strongly and actively committed to diversity within its community.

DISTINGUISHED PROFESSOR OF TELECOMMUNICATIONS DEPARTMENT OF TELECOMMUNICATIONS BALL STATE UNIVERSITY - MUNCIE, INDIANA

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Teddy Ebersol: "The Finish Line Is Only the Beginning"

On Sunday, Nov. 28, a private plane carrying NBC Sports Chairman Dick Ebersol, two of his children and a three-person crew crashed shortly after takeoff from a Montrose, Colo., airport. Edward Ebersol, 14, was killed, as were two of the crew members. Dick Ebersol and his son Charlie, 21, were injured. Adding to the agony, Edward's body was not found until a day later. The family late last week released this obituary of their son, also known as Teddy.

Known as Teddy to family and friends, Edward Bright Ebersol was born on June 10, 1990, in Torrington, Conn. Through eighth grade, he was a student at Washington Montessori School in Washington, Conn. This fall, he entered the freshman class at The Gunnery, a boarding school also in Washington, near the Ebersol family's hometown of Litchfield.

Teddy was a deeply cherished son to Susan Saint James and Dick Ebersol, and youngest brother to his sister, Sunshine, and to his brothers Harmony, Charlie and Willie.

In an autobiography he penned as an eighth-grade writing assignment, Teddy wrote: "The meaning of love can be described in one word: family. The family I have holds tight to old bonds and extends a firm grip on new ones. My family on the highway to love is neck and neck with God. All the fancy talk I used to describe my family cannot measure them. Each family member takes this love to a new extreme ... and turns it into something that no one can describe. That rope of love never slackens."

Teddy was a warm, loving and energetic young man with a self-knowledge beyond his years and a wonderfully quirky sense of humor that led him to say things that could be interpreted as silly and profound at once. While speaking at his eighth-grade graduation ceremony, he said, "A quote that I made up a little while ago seems to make sense to me now as I reflect on the years behind me and the years ahead: 'I follow, therefore I lead.'"

He loved politics and enjoyed engaging grownups in lively political discussions. While at the Daytona 500 earlier this year, he took great delight in debating the entire conservative-leaning pit crew of driver Kyle Petty.

Bill Rollnick, a family friend who was there with the Ebersols, said, "Teddy explained to them why they were wrong politically, arguing from knowledge. He

argued them to their knees. I'm a Democrat, and next to Teddy I felt like Jerry Falwell. He was very opinionated, but he was never unkind. At 13 years old, he knew so much. I yearned for the day I could have won an argument with him."

Although wise beyond his years, Teddy had a charming innocence. A fan of the television show *SpongeBob SquarePants*, his favorite character wasn't SpongeBob himself but rather Patrick, the intensely loyal, exuberant sidekick.

He enjoyed as well videogames (*Halo 2* was a recent highlight), music, and the Harry Potter and Lemony Snicket books. Teddy often memorized favorite movie lines and entertained his friends and family by quoting dialogue. He loved karaoke and had a sweet and strong singing voice.

He especially enjoyed his many summer sessions at

had grown up together. He acted like he was their best friend, like he knew them forever." Teddy also encouraged his classmates to volunteer at LARC.

Teddy's work with LARC was inspired by a trip with his mother to visit schools in China that were preparing for the International Special Olympics in Shanghai in 2007.

This past summer, their adventure together was a cross-country road trip, catching baseball games along the way. Teddy and his mom often said they were "best friends in the whole wide world."

One of Teddy's other best friends, Doug Sloam, said that "Teddy was always happy and optimistic and really fun to be around. He had so much energy and was always talking. He was also generous. I used to forget my lunch sometimes, and Teddy always gave me a

snack or two. In sixth grade, Teddy gave me one of the best birthday presents ever when he took me to a Red Sox-Yankees game at Fenway Park. And that day, for my sake, he rooted for the Yankees. I will never, ever forget him."

A mutual love for sports gave Teddy a strong connection to his father. Everyone who knew him could see that his No. 1 passion was the Boston Red Sox, although his family was split in their allegiances. Teddy's sister, mother and 89-year-old grandmother align with the Sox, but his dad and brothers are die-in-the-wool Yankees fans. Teddy's enthusiasm for the Red Sox this season was so infectious that even Dick Ebersol found himself rooting for Boston during the World Series. Like his beloved team, Teddy never lost hope.

In his eighth-grade graduation speech, Teddy said, "The finish line is only the beginning of a whole new race." Teddy Ebersol's life on this earth has reached the finish line, all too soon. His wonderful spirit will live on in his family and in all who knew and loved him.

Donations in Teddy's memory may be sent to the Litchfield County Association for Retarded Citizens at the following address:

**LARC Capital Campaign
In Memory of Teddy Ebersol
84R Main St.
Torrington, CT 06790
Federal Tax ID 06-6075006
Phone: 860-482-9364**

Plans for a memorial service will be announced this week. Individuals can send condolences to this e-mail address: ebersolfamily@nbcuni.com.

Teddy's enthusiasm for the Red Sox was so infectious that even Yankee fan Dick Ebersol found himself rooting for Boston during the World Series. Like his team, Teddy never lost hope.



Teddy Ebersol (left) with his parents, Susan Saint James and NBC Sports' Dick Ebersol.

Timberlake at the farm and wilderness camp in Vermont. Teddy was also a prize-winning poet, having won a medal last year at a national poetry convention for a poem he wrote—a humorous poem, naturally.

Teddy served as an altar boy at St. Anthony of Padua Church in Litchfield and also volunteered at the Litchfield County Association for Retarded Citizens in Torrington. LARC staff member Elaine Tedesco said that Teddy would sit down with the clients "like they

Mega-Giants and Scarcity

Broadcasters are going to start off the New Year by going to the Supreme Court to challenge the FCC's role in defining the public interest and how broadcasters meet it. The court's decision has immense implications for broadcasters and the public.

In 1969, a Supreme Court decision upheld the idea that spectrum is scarce and, that being so, the FCC has the responsibility to police the airwaves by, among other things, deciding ownership limits. The Red Lion case (named after a fundamentalist radio station in Red Lion, Pa., that refused to give airtime to someone it had demeaned) upheld the need for the fairness doctrine and the FCC's role in monitoring the business of the medium. Though the fairness doctrine eventually went away, the FCC's other roles have not.

Now companies with major broadcast holdings, including Fox, Viacom and Sinclair, are preparing to argue to the court that there is no real scarcity of media outlets in this world and that all ownership restrictions should be lifted. We can see their point. When Red Lion was decided, there was no Internet, no widespread cable penetration and no satellite services. There were just three networks. There was no digital capacity to allow for the squeezing of more and more channels into available spectrum, or low-power TV. There was a handful of conventional media outlets available in communities, not dozens and dozens.

Spectrum remains a public resource, which broadcasters recognize, but whether it is scarce is another question. Whether that perceived scarcity should continue to allow the government to control the electronic press in a manner unthinkable

if it were applied to print is the key question.

We have argued alongside broadcasters for decades that the Red Lion rationale should be jettisoned. Antitrust laws should be sufficient to guard against monopoly business practices. The public and broadcasters, not government, should be the arbiters of content.

We still believe that, but some broadcasters, intent on serving their shareholders rather than those in their communities, have not helped make their own case in recent years.

The concentration of radio and TV groups, studios and rep firms has an upside in operational efficiencies and has certainly been mirrored in other businesses. But ask the reporter (formerly) on the beat or the producer in the unemployment office, and you

will be told that there has been a downside in human terms. Ask the citizens with an unconventional opinion or iconoclastic musical taste, and they might tell you a different story, too. Consolidation can't help affecting the end product. The "powerful" Internet that

people talk about still largely lacks the things that make broadcast stations influential: advertisers, money and institutional history.

But as we have seen with the indecency crackdown, giving the government power over information outlets can pose threats far greater than the perceived dangers of consolidation. Is the public well-served by broadcasters whose size, scope and content are subject to government control—five politically aligned FCC commissioners and a Congress with obviously partisan interests? Or is it better-served by a press that is allowed to be big, obnoxious, opinionated, powerful ... and free, like print? How the Supreme Court sees it may set the stage for a stunningly different media world in 2005.

EDITORIAL

OPEN MIKE

CBS: Delayed Reaction

Editor: We'd like to clear up some misapprehensions that might be created by your Nov. 29 editorial, "Pay for Play," which stated incorrectly that CBS instituted tape delays on live broadcasts as a part of Viacom's recent settlement with the FCC.

This is not the case. CBS has been doing delays for years but, like other broadcasters, only with an audio delete capability. After the 2004 Super Bowl

incident, it became clear that a video delete capability might also now be necessary, and we developed and implemented this technology within one week for the live broadcast of



Gil Schwartz

the 2004 Grammy Awards.

This was 10 months before any agreement with the FCC was rendered. We also testified before Congress last February about our commitment to do everything we can to protect our viewers from inappropriate content, including the implementation of such delays, which were already in place.

At the same time, your readers should also be aware of the fact that that no delay of any sort will be applied to live sports or news programming. The delay system that CBS now employs to delete inappropriate video and audio footage applies only to live entertainment programming, as well as entertainment events or interviews aired during sporting events. Our news and sports programming has aired, and will continue to air, without any delays.

Finally, contrary to statements in your editorial, no FCC action, much less any fine, was imposed on *CSI*, nor was any paid.

Gil Schwartz
Executive Vice President
CBS Communications Group
New York, NY

Editor's note: Viacom's settlement cleared up complaints to the FCC about CSI and other shows. No fines had been issued.

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Advertisers Will Feel Impact of Election

Americans tend to fixate on the presidential race, but it's the congressional and Senate races that often make the difference in politics. In the near future, most issues relevant to advertisers will be driven by popular, congressional or regulatory pressure and less by the presidency.

For example, while John Edwards made direct-to-consumer (DTC) drug advertising a key issue while he was campaigning, concern over drug pricing is unlikely to abate even though the Kerry-Edwards ticket was defeated. DTC marketing will be the most important advertising-related topic of the next four years. Support for restrictions on these commercials has been bipartisan, and consequently Edwards' defeat will not eliminate the issue.

Altering such a large advertising category (approximately 5%, or \$1.5 billion, of all national television advertising) would affect inventory availability and prices in the short-term. At the FCC, aside from ownership regulation, commissioners' positions do not fall neatly along party

lines. Consequently, it is difficult to predict the outcomes of issues under their jurisdiction.

But as for ownership, local media would most likely be affected by changes to ownership rules.

The FCC has also been considering how much bandwidth to allocate to local TV stations for the migration from analog to digital broadcasting. The outcome remains as uncertain as ever but may result in a massive expansion of local "channels."

Media concentration, another political buzz phrase, may cause higher pricing, but as we have seen from recent Clear Channel results, at high levels, media suppliers may become more dependent upon advertisers and

be forced to constrain price increases. Even when higher prices result, more concentration may improve the efficiency of advertising transactions.

"À la carte" rules would allow consumers to choose which cable channels they receive. The FCC, at least, seems to have concluded that à la carte causes as many problems as it solves, but it's not a dead issue.

Indecency is intimately tied to the à la carte matter. One possible outcome

that may satisfy advocates of cable indecency regulation (without violating the First Amendment) is to place the power of controlling perceived indecency in consumers' hands by allowing them to have à la carte rights. But à la carte would put the demand for ads on fewer fully distributed networks.

Finally, changes probably will be made to campaign-finance laws. Don't expect it to be mandatory that political donations become anonymous (which would fundamentally alter how elections are financed and result in scaled-down election budgets), but Congress will likely attempt some changes to the current laws.

This is important to local advertisers, because much of the commercial inventory in swing states was consumed by political advertising. Spot pricing was likely higher for others, or, alternately, it "crowded out" advertisers from buying in affected markets.

But all of this takes a back seat to the real issue. Over the next four years, the most important political consideration for all advertisers will remain the fairly familiar: the state of the economy.

Wieser is Director of Industry Analysis for Magna Global, one of the world's largest media services firms and a unit of the Interpublic Group.

AIRTIME By Brian Wieser

The Dead Zone

Prime time's growing blood lust

Let's face it. This is the season of over-kill.

There's an alarmingly high body count on prime time these days, the result of a surging crime wave of formula "procedurals," the more graphic the better. Depending on your threshold for such things, either we're in a golden age of crime drama or we've hit a grisly nadir. It's a nightly orgy of murder and mutilation, a forensic feast of splatter analysis and body-cavity voyeurism. On a recent *CSI: NY*, as the camera lingered on a charred corpse in which a bullet hole was discovered, the coroner remarked, "This murder wasn't about the triumph of minimalism." When is it ever?

It may not be pretty, but it sure is popular. According to TV and Nielsen, the city morgue is our new national playground. Before long, those chats at the water cooler will leave you in a cold sweat as you rehash last night's prime-time carnage.

I can hear it now: "Did you see that lady coroner on *CSI: Miami* cut off the victim's head and boil it? Sick, dude!"

Some of us are still reeling from the recent *CSI: NY* episode that revealed a cult of wannabe amputees—the technical term is "body integrity identity disorder"—who injure themselves in hopes that doctors will remove their damaged limbs. This creepy situation brought out the latent joker in our crime-lab heroes. (Sometimes I think the TV industry's underemployed comedy writers are moonlighting on these trendy shows to provide the gallows-humor one-liners that are de rigueur—or is that rigor?—at nearly every TV crime scene.)

Finding a severed finger in the freezer of a guy who died of a botched leg amputation, frizzy-haired detective Stella Bonasera (Melina Kanakaredes) quips, "This place gives a whole new meaning to the term chop shop." And later, she surmises, "It only takes one print to finger someone."

Stop. You're killing me. I mean it.

Not counting the frequent repeats of NBC's and CBS' franchise hits on Saturdays and the endless recycling on cable, there are roughly 14 hours a week—more than The WB's or UPN's entire prime time schedule—of these criminal, legal and medical procedurals. You're tempted to say enough is enough, except audiences don't seem to be able to get enough. For now.

Surely, this fetishistic absorption with death, dismemberment and DNA has its limits. Maybe by the time NBC presents its seventh nightly installment of *Law & Order* (a fourth is on its way at midseason) and CBS turns to Alaska to find a region that hasn't yet hosted a *CSI*, we'll have maxed out on mayhem. But I

wouldn't count on it.

There has always been something satisfying about seeing justice administered in bite-sized episodic doses, whether it's Perry Mason in the courtroom or Gil Grissom at the microscope. A school of thought suggests this is especially true during a time of national unease, like during an extended overseas war. Osama may have eluded us so far, but we know that, within an hour, we'll see the cops get the fiend who's drugging women into comas to trap them inside their bodies until he kills them (the nightmare-inducing plot of the first episode of the relentlessly dark *CSI: NY*).

MATT ROUSH

What's most troubling about this grim glut is the overall numbing effect of such extreme overexposure to society's most twisted criminals. After a while, it all

becomes an abstract blur of bodies, and it's often hard to distinguish one cadaver from another.

Thankfully, there are exceptions to this rule, and I find myself gravitating toward the procedurals that place a greater emphasis on humanizing the victim

than on the generic grind of detective and lab work. That's why NBC's *Law & Order: Special Victims Unit*, with its zealous squad's ferocious anger toward the pervs who target vulnerable women and children, is currently the most compelling of the *L&O* shows. That's also why the crown jewels of Jerry Bruckheimer's factory aren't the ubiquitous (and top-rated) *CSI* shows but the more emotionally resonant *Without a Trace* and *Cold Case*.

Recently, *Cold Case* has distinguished itself

by digging up old mysteries from turbulent eras, including the McCarthy Communist witch hunt of the early '50s and the AIDS panic of the early '80s. The cases become even more tragic when you realize the subjects were basically victims of their times.

Without a Trace, which now draws more viewers many weeks than *ER* on Thursdays, has developed into one of TV's best shows, regardless of genre. As the

There are roughly 14 hours a week of criminal, legal and medical procedurals—more than The WB's or UPN's entire prime time schedule.

FBI agents (led by the formidable Anthony LaPaglia) race the clock to track down missing persons, rarely knowing if they're still alive, they construct psychological profiles alongside the timeline. The more you learn about these lost souls, the more you care about the outcome.

And sometimes they're not even dead. These days, you could hardly ask for a more refreshing change of pace. ■



Cold Case is the rare crime procedural with an emotional resonance.

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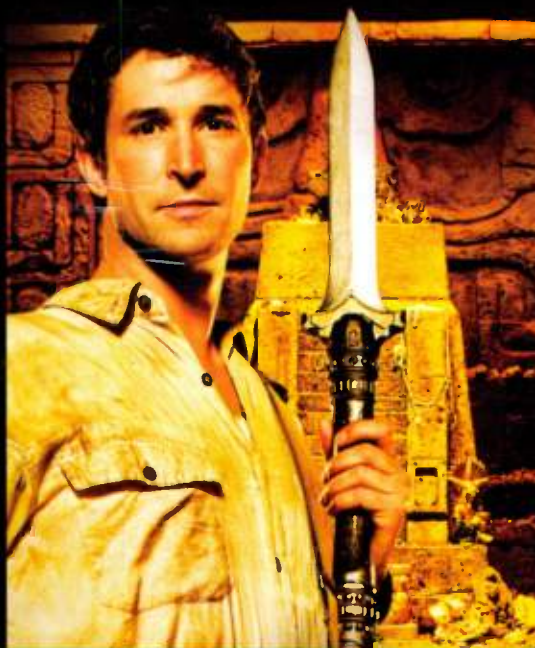


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