

MEDIAWEEK

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Discovery Finds Abruzzese

CBS sales chief makes unprecedented jump to cable as nets battle for dollars **PAGE 4**

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Several issues on back burner as pols recess

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Fighting Irish Bring Good Luck

Notre Dame's success helps lift college ratings

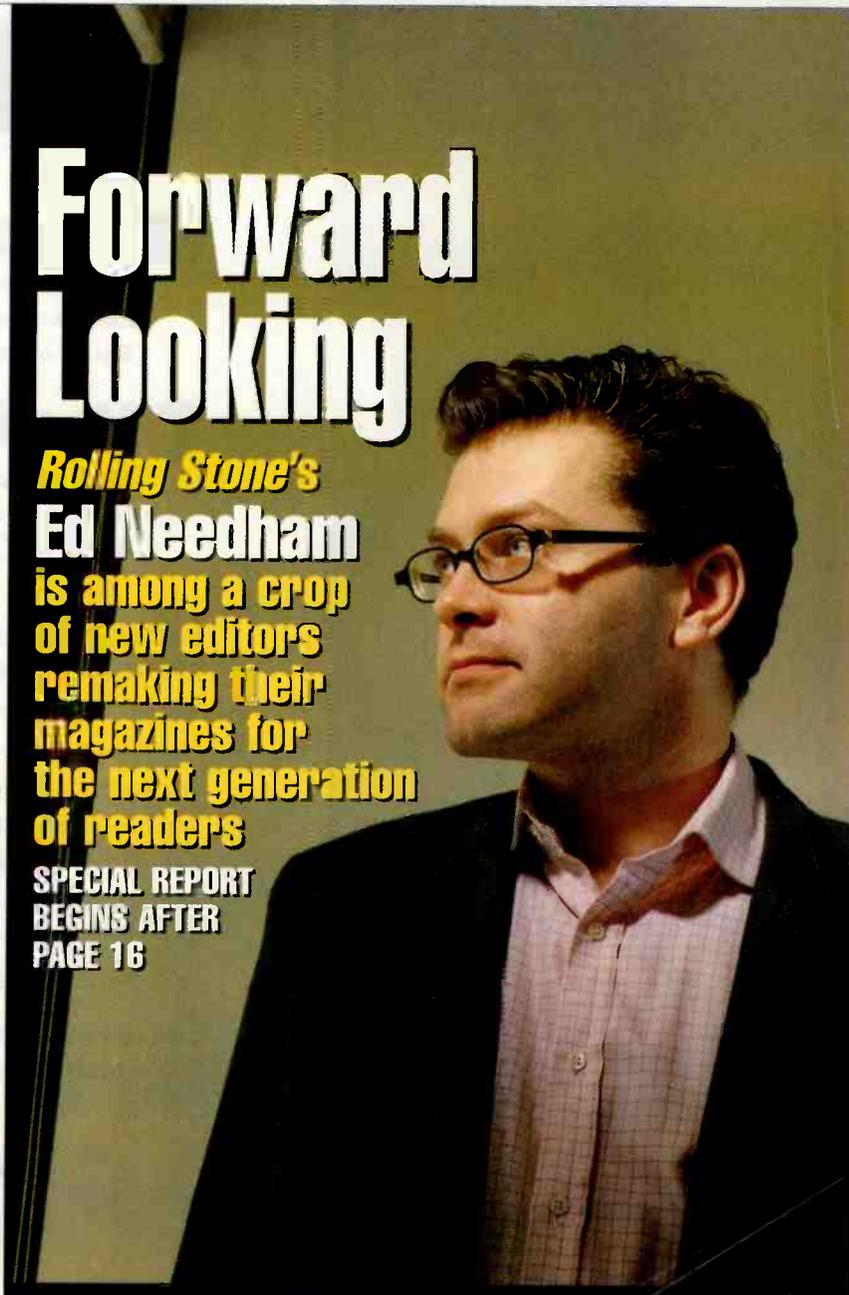
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Forward Looking

Rolling Stone's
Ed Needham
is among a crop
of new editors
remaking their
magazines for
the next generation
of readers

**SPECIAL REPORT
BEGINS AFTER
PAGE 16**



MICHAEL LEWIS

MARKET INDICATORS

NATIONAL TV: STRONG
With prime time full up for fourth quarter, other dayparts are starting to max out. Heavy prime-time advertisers like movie studios and autos are buying early morning ad inventory.

NET CABLE: TIGHT
Cable avails continue to tighten as advertisers spend on holiday and year-end promotions. Major categories are wireless, studios, auto, packaged goods and retail. First quarter looks healthy so far.

SPOT TV: STUMPING
Politicals keep inventory tight through Nov. 5. Advertisers are being displaced onto radio or holding back until after the elections. Retail, entertainment expected to pick up soon.

RADIO: SQUEEZED
Auto, retail and entertainment are actively spending through late December. Politicals are squeezing avails in N.Y., N.J., Fla., Calif., N.C. and Michigan.

MAGAZINES: WARM
Home furnishings and home retailers are beefing up their buys in shelter titles in anticipation of readers hunkering down during the winter months.



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At Deadline

■ POLITICAL TV SPENDING TO REACH NEW HIGHS

Spending on TV ads for political campaigns is running at a record pace this year, according to the Campaign Media Analysis Group. The firm, which tracks political spending on TV, has tallied \$690 million in TV ads so far this year, compared with \$672 million for all campaigns in the 2000 presidential election year. A major factor in the spending increase: tight gubernatorial races in big states, where air time is expensive.

■ FOX GOES VIRTUAL AGAIN IN WORLD SERIES

Fox is once again offering virtual on-air advertising that appears on the wall behind home plate during its World Series telecasts, which began on Oct. 19. The virtual signage will include ads for MasterCard, John Hancock and Budweiser. All are official sponsors of Major League Baseball. Fox is also using the virtual display to promote some of its prime-time shows, including *Boston Public*, *24* and *Bernie Mac*. Fox first aired the virtual ads during last year's World Series.

■ HAUPT TO HELM PUBLICIS BUYING

Roger Haupt, president/COO of Publicis Groupe, will manage the new media-buying segment of the company, which recently finalized its merger with Bcom3. Reporting to Haupt, Bcom3's former CEO, are Jack Klues, chairman of Starcom MediaVest Group, which came under the Publicis umbrella in the Bcom3 acquisition, and John Perriss, CEO of Zenith Optimedia Group.

■ TRIBUNE UNIT INKS WALGREENS DEAL

Tribune Media Net, the national ad sales division of Tribune Co., last week signed a one-year, multi-million-dollar deal with Walgreens that will give the drugstore chain exclusive sponsorship of a TV program produced by Tribune for the advertiser. Beginning Nov. 16, *Walgreens Presents Rx TV* will air Saturdays at 10:30 a.m. on WGN-TV, Tribune's owned-and-operated WB outlet in Chicago, and on WGN Superstation, which reaches more than 56 million homes.

■ COX RADIO WARY OF PAYOLA

Cox Radio, the country's third-largest radio group, last week said it will sever its ties to independent record promoters in an effort to distance the company from payola-like schemes, in which promoters have paid stations in exchange for access to playlists. Cox will end its relationships with the promoters as their contracts begin to expire over the next year. Robert Neil, Cox president/CEO, said the company will deal directly with record companies at all of its radio stations.

■ AOL'S MILLER KILLS POP-UP ADS

Recently appointed America Online CEO Jonathan Miller made his first major move last week in killing third-party pop-up ads, which have drawn ire from AOL subscribers. The announcement was made in conjunction with the launch of AOL 8.0 software. Said Miller: "By ending third-party pop-ups and merchandise sales we are giving our members what they want—which in turn will make AOL an even better vehicle for our advertising partners." The ads will phase out as contracts with pop-up advertisers expire. AOL's biggest competitor, Microsoft's MSN, launches its 8.0 software release this week.

■ ADDENDA: ABC Family is launching a new prime-time programming block on Saturdays that will include the repurposed freshmen ABC sitcoms *Life With Bonnie* and *Less than Perfect*. The block, ABC+, will begin on Oct. 26 from 9 to 10 p.m. The programs will air the Saturday following their Tuesday premieres...Spurred on by the illegal business practices at Adelphia Communications and other publicly traded corporations in the U.S., the **National Cable & Telecommunications Association** is expected to release new accounting guidelines for cable companies this week. The guidelines are voluntary, but some multiple system operators plan to adopt them with quarterly reports as early as this month...**CNBC** is revamping its lineup to offer more consumer-friendly fare like the five-day special *The Price of War*, which examines the impact of a war with Iraq on the U.S. economy...**The Small Webcaster Amendment Act** failed to make it to the Senate floor last week. The legislation would have given small Internet-only webcasters some relief from music royalty fees that went into effect Oct. 20. With Congress now in recess, the bill, which passed the House a week ago, is effectively dead...**ABC Television** and its affiliate group last week approved a new agreement that will frame the network-station relationship for the next two years. Affiliates agreed to pay roughly \$34 million yearly to help subsidize ABC's *Monday Night Football*. Additionally, the affiliates received prime-time advertising inventory guarantees; assurances for affiliation agreement assignments, a provision that allows affiliates' owners to sell stations without concern that the network might pull its affiliation; and continued affiliate participation in ABC's SoapNet. The plan covers a two-year period, retroactive to Aug. 1 and running through July 31, 2004...**Roseanne** is back with ABC—this time in an unscripted workplace comedy that may launch as early as next summer.

INSIDE MEDIWEEK



New EW m.e. Tetzeli maps out some changes for the weekly's covers Page 29

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McCain Introduces Bill To Aid Small Broadcasters

Sen. John McCain (R-Ariz.) last week introduced the Telecom Ownership Diversity Act, a bill he said could help more women and minorities become broadcast owners.

The measure would provide tax breaks to those selling telecommunications companies to small businesses.

Congress killed a similar program in 1995 following allegations the incentive plan was abused, with small buyers quickly selling out to larger owners. McCain's bill would levy tax penalties if a company is resold within three years.

With the current Congress winding down, the measure is not likely to become law, but it could serve as a model for legislation next year. —Todd Shields

Nielsen Local Cable Ratings To Break Out Satellite

Nielsen Media Research next fall plans to begin reporting local cable viewership excluding satellite TV services' delivery of cable programming. The company plans to supply the data to clients via electronic versions in CD form; Nielsen is not reformatting its local ratings books. The CD version will break down total DMA delivery as well as total wired cable, which excludes satellite viewership. Nielsen is still discussing the specifics of the changes with clients, said Nielsen representative Karen Kratz.

Currently, Nielsen's local cable ratings include satellite delivery. Many local broadcasters have complained about that inclusion, saying it unfairly inflates cable's viewership. Because satellite carriage of cable does not include local cable programming or advertising, the broadcasters say satellite should not be included in the local cable ratings. —Sandy Brown

Wenner Taps AOL's Rudnick As First Marketing Chief

Wenner Media, publisher of *Rolling Stone*, *Us Weekly* and *Men's Journal*, has named America Online veteran Jill Rudnick to the new (continued on page 6)

Discovery Signs 'A'-Lister to Boost Sales

Tapping CBS' Abruzzese, giant cable programmer hopes to stem CPM erosion

CABLE NETWORKS By Megan Larson and John Consoli

In an aggressive push to restore Discovery Networks' upscale allure with advertisers, recently installed president Billy Campbell last week made what one insider described as a "Godfather-type offer" to his friend, CBS sales president Joe Abruzzese. In accepting, Abruzzese gets a \$1 million-plus salary to oversee sales at all Discovery networks, at least \$200,000 more than he was said to be earning at CBS.

As the first broadcast network sales chief ever to move to a cable sales operation, Abruzzese also gets more autonomy to operate, out from under the ever-watchful eye of Mel Karmazin, president of CBS parent Viacom. He also gets to work for a friend in Campbell—the two men met in the mid-1990s when they were colleagues at CBS, where Campbell worked at CBS Entertainment and Abruzzese in sales.

In turn, Campbell gets a seasoned TV sales veteran with 22 years at CBS (the last 12 as sales president) who is well-liked by advertisers and media buyers. As much as it will remain Campbell's job to pick the right programming for Discovery, TLC and Travel Channel to stem declining household ratings and win back upscale audiences, it will be Abruzzese's challenge to make the 11 Discovery network properties more desirable to advertisers.



Abruzzese (left) and Campbell, both former CBS execs, will use multiplatform deals to attract more ad dollars for Discovery.

Campbell, who left his post as head of Miramax Television in May to head up Discovery Networks, began trying to coax Abruzzese away from CBS almost as soon as he learned that the sales chief's contract was due to expire on Oct. 31. With Discovery Networks under private ownership, Campbell had the freedom to offer Abruzzese the sizable salary bump to lure him away from CBS.

Media buyers view the move as a plus for Discovery. "It remains to be seen what is going to happen, but with Campbell's vision and his relationship with Abruzzese, there is great

Will CBS Sales Be an Inside Job?

Media buyers and Viacom/CBS insiders last week said the best course of action for the network to deal with the departure of ad sales president Joe Abruzzese would be to name a successor from within. Promoting a CBS executive would likely ensure that most of Abruzzese's team remains intact, while tapping an outsider could cause upheaval and more departures. "I don't think [management] would want to disturb the chemistry by going outside," said one insider. "Bringing in someone from the outside would make it easier for Joey to raid the place and move some of his team to Discovery," added an agency executive. Les Moonves, CBS Television president, will make the decision on Abruzzese's replacement.

JoAnn Ross, CBS vp of national sales, holds the No. 2 post under Abruzzese and is a prime candidate to succeed him. However, CBS insiders also said Chris Simon, senior vp of prime-time sales, could leapfrog Ross for the post. Other internal possibilities include

opportunity," said Bob Flood, senior vp/director of electronic media for Optimedia International. "Being able to secure someone like Joe is a good sign for where Discovery is headed."

Abruzzese described his move as "going from one great brand to another," though it's more than a bit ironic that a man who has been aggressively selling the value of broadcast inventory for more than two decades at CBS will now extol the virtues of cable. But Abruzzese said that even while at CBS, he believed the average 40-percent pricing difference between broadcast and cable TV inventory was too wide. At Discovery, one of his top priorities will be to close that gap.

"We have to get away from the supply-and-demand argument and look at value," said Abruzzese, who starts his new job on Nov. 1.

While Abruzzese is optimistic about his mission, competing cable sales executives and buyers warn he will have his work cut out for him, having to overcome many advertisers' long-held belief that cable's audience, even for current big hits like FX's *The Shield* and USA's *Monk*, does not justify broadcast-level ad rates.

"If anyone can get a hearing it's Joe, but the marketplace has to sort out the relative value for [audience] reach," said John Rash, senior vp/director of broadcast negotiations for Campbell Mithun.

As he did at CBS, Abruzzese plans to grow Discovery's business by creating more cross-platform sales packages and program-specific sponsorships sold via entitlements, bookends and product integration. Discovery Networks has already dabbled in this arena with Taco Bell's sponsorship of Discovery's *Monster Garage* and Procter & Gamble's sponsorship of TLC's popular *Trading Spaces*.

"Joe brings that culture from CBS," said Pam Zucker, senior vp/group director for Mediavest, noting Abruzzese's innovative ad packages on shows like *Survivor*. Zucker said that

Scott McGraw, who heads sports sales, and Lisa McCarthy, senior vp of Viacom Plus, the company's cross-platform sales unit.

Abruzzese had not only CBS Television sales operations under his supervision, but also sister net UPN as well as Viacom Plus. One option, buyers said, could have Abruzzese's successor run CBS network sales and let the other units run autonomously.

Whatever happens, Abruzzese will be sorely missed. "Joe was a very important part of this place," said another Viacom insider. "It's going to be hard to find one person to handle all those duties." —JC

Discovery had a "tough" upfront last summer, with CPM declines, because the net priced itself higher than most competitors. "But Discovery has always been forward-thinking about marketing sponsorships, and they offer advertisers value beyond spots and dots," Zucker added.

Beyond luring back viewers lost this year (the flagship Discovery net's viewership in the 18-49 demo tumbled 19 percent in the third quarter), Abruzzese said he wants the nets to appeal to young male viewers with more shows like *Monster Garage*. While Campbell has yet to unveil any programming initiatives of his own—most fourth-quarter programming was in devel-

opment before he arrived—he is expected to make some announcements in a few weeks.

Abruzzese said he will evaluate the existing Discovery sales team before making any moves. The company has a solid sales staff in place, media buyers said, but everyone is abuzz about what role Bill McGowan, executive vp of ad sales, will play. McGowan, an outspoken oracle of cable ad trends during the upfront each year, will now report to Abruzzese. McGowan said that there "is no truth to the rumor that I'm retiring. When Billy told me about Joe and asked that I stay, I thought about it for an hour and then I told him I was in." ■

Youth's Changing Tastes

Some top Hispanic stations lose summer share as young listeners flip the dial

RADIO By Katy Bachman

Youth can be fickle. Just ask some of the top Spanish-language radio stations in Los Angeles and New York, which saw their shares slide in Arbitron's Summer survey, which began rolling out last week. In Los Angeles in particular, most of the dominant Spanish-language radio outlets saw their shares of audience slide from the Spring survey, as the number of young listeners tuning in swelled during the survey period, June 27 to Sept. 18. One key factor was a higher number of young Hispanics listening to mainstream stations.

In L.A., Spanish-language stations in total dropped a full 3 share points, from 21.7 to 18.7. Hispanic Broadcasting Corp.-owned KSCA-FM took the biggest hit. The station, which also made some changes in its music to draw in younger Hispanics, lost 32 percent of its audience—older listeners may have felt alienated by the programming shift. The only Spanish-language station in L.A. that posted a gain was Liberman Broadcasting's KBUE-FM, which was already positioned as a younger-skewing Spanish-language station.

Hispanic broadcasters blamed the shortfall on the decline in the number of diaries returned by Spanish-primary Hispanics. The Summer Arbitron survey had a lower concentration of Spanish-language Hispanics in the sample, 47.3 percent, down from 53.7 percent in the Spring. "Language does have an effect on radio listening—if you're not a Spanish-speaker, you're not going to be a part of the Spanish-language station audience," said Bill Tanner, executive vp of programming for Spanish Broadcasting System.

Arbitron defended the move, pointing out

that it changed the way it determines language preference on diaries at the behest of Hispanic broadcasters. "You're not seeing a change in the number of Hispanic listeners, you're seeing an increase in listening by blacks and others," said Ed Cohen, Arbitron vp of radio research.

So who benefited? L.A.'s top-rated Urban outlet KPWR-FM, which actively courts young Hispanics through its promotions and music. KPWR enjoyed its highest share of the Spanish-primary audience in five Arbitron books. Clear Channel's KIIS-FM, L.A.'s No. 3

SAY 'SLIDE' IN SPANISH

L.A. STATION (OWNER)	SPRING '02 SHARE (RANK)	SUMMER '02 SHARE (RANK)
KSCA-FM (HBC)	4.7 (2)	3.2 (8)
KLVE-FM (HBC)	3.6 (7)	3.0 (10)
KBUE-FM (LIBERMAN)	2.7 (12)	2.9 (11)
KLAX-FM (SBS)	2.7 (12)	2.3 (18)
KXOL-FM (SBS)	2.5 (14)	1.9 (23)

Source: Arbitron Spring (March 28-June 19) and Summer (June 27-Sept. 18) surveys. 12-plus average quarter-hour shares

station overall, doubled its Spanish-language share over the Spring survey. "The reality is Hispanics are all over the dial, and the Hispanic market overall is 12 years younger than the general market," said Rosa Serrano, senior vp of Initiative Media's multicultural division.

Hispanic shares also declined in New York, where a hot battle for young listeners in Urban formats continues. Emmis Communications' WQHT-FM pulled ahead of Clear Channel's WWPR-FM for second place. WQHT's morning show earned a 4.8, up by half a point, to WWPR's 4.1. Both still trail longtime a.m. leader WLTW-FM (an AC outlet). ■

position of chief marketing officer. Rudnick most recently was executive director, marketing services/creative services at AOL Interactive; she previously held senior-level marketing positions at magazines including American Express Publishing's *Departures*, Time Inc.'s defunct *Life* and Meredith Corp.'s *Ladies' Home Journal*.

"We felt that by elevating the position to something bigger than we had before, we could attract somebody confident, strong and big that could come in and address our marketing needs," said Kent Brownridge, Wenner senior vp/general manager. Wenner's marketing department, which consists of a staff of 15, will report to Rudnick.

Rudnick's first priority will be to sharpen up each of the titles' positioning statements so "we have a clean, crisp, true effective description of each magazine and the benefits it brings advertisers in the marketplace," added Brownridge. —Lisa Granatstein

Tight Nascar Driver Race Pumps Up NBC/TNT Ratings

Through 14 telecasts this year, excluding last February's Daytona 500, Nascar Winston Cup coverage on NBC and TNT has produced a 4.3 national rating and 10 share in households, 8 percent above last season's 4.0/11, according to Nielsen Media Research data. NBC's rain-delayed coverage of the UAW-GM Quality 500 on Oct. 13 scored a 5.0 rating and a 10 share, Nascar's highest rating ever against Sunday NFL telecasts on CBS and Fox. The Oct. 13 race also aired opposite a Major League Baseball American League Championship Series game on Fox.

This year's ratings are up over sizeable increases recorded last year, when the NBC/TNT coverage of Nascar generated a 34 percent gain over the 2000 season.

Helping to drive viewer interest this year has been a close season-long battle for the driving championship, with less than 100 points separating leader Tony Stewart from rookie Jimmie Johnson. With four races to go, it is the closest championship competition in Nascar history. —John Consoli

A Break in the Action

Congress' election recess leaves some key media issues in limbo

WASHINGTON By Todd Shields

Congress recessed last week to campaign for next month's elections, leaving most bills aimed at the broadcast or cable industries half-baked or undone. Lawmakers say they will try again next year to pass much of the unfinished business, whether it involves the transition to digital TV, free air time for political candidates or consolidation.

The main effect of the waning 107th Congress on TV may have been to leave the industry as is. Legislators defeated a measure strongly opposed by broadcasters to require lower rates for election campaign ads. And Congress delayed a spectrum auction that could have enriched TV station owners willing to sell their UHF spots, such as Paxson Communications.

Otherwise, virtually no legislation of importance to TV emerged from Congress, which only returns shortly after the Nov. 5 election for a brief session likely to concentrate on spending measures. That schedule leaves little likelihood of success for legislation not already far along.

That includes a digital-transition bill announced by the House Commerce Committee chair, Rep. Billy Tauzin (R-La.), which as drafted would force broadcasters to relinquish traditional analog spectrum, and calls for federal standards to make DTV sets compatible with cable. The measure is "likely to change significantly" before it is introduced next year, said Tauzin aide Ken Johnson, without elaborating. National Association of Broadcasters lobbyist Jim May said the bill could change as the Federal Communications Commission acts on issues of compatibility and signal piracy protec-



In addition to taking on campaign financing, Feingold is worried about radio consolidation.

tion. "Very early in the next Congress will be the watershed for DTV legislation," May said.

Sen. Russ Feingold (D-Wis.) is expected to reintroduce his legislation that would let the FCC revoke licenses of radio companies that abuse market power. Feingold on Oct. 17 joined Sens. Richard Durbin (D-Ill.) and John McCain (R-Ariz.) in introducing a bill that calls for free air time for candidates. It is likely to return next year. Bills instructing the FCC to loosen restrictions on ownership made no progress but could pop up after the agency wraps a sweeping review of the rules next spring.

Next month's election could switch control of the Senate to Republicans and the House to Democrats. One possible effect would be to slow a rush to relinquish analog TV spectrum. Rep. John Dingell (D-Mich.), the likely Commerce chair in a Democratic House, has made clear his discomfort with such proposals. With a shift in the Senate, McCain would probably return as Commerce Committee chairman. ■

Sunday, Busy Sunday

As *The Sopranos'* ratings success continues, NBC and ABC show strength

TV PROGRAMMING By A. J. Frutkin

Despite the continued success of HBO's *The Sopranos*, broadcasters are showing surprising resilience on Sundays. One of the night's most positive stories is NBC's sophomore drama *Law & Order: Criminal Intent*. In its first three airings, the series averaged 15 million viewers and a rating of 5.0/11.3 among adults 18-49, according to Nielsen Media Research data.

Most buyers agreed that the show's episodic nature, combined with the power of its franchise, could propel further growth. "*Criminal Intent* has been successfully imprinted with the *Law & Order* brand," said John Rash, senior vp/director of broadcast negotiations for Campbell Mithun.

ABC's *Alias* is faring less well at 9 p.m. Over three broadcasts, the series is averaging

Live fast, die a senior citizen

Burn out or fade away? How about burn brightly for dozens and dozens of years. Drugs, debauchery, trashed hotels, women half your age; today's flash-in-the-pan rock star needs a role model to keep the dream alive! We give you, Keith Richards.

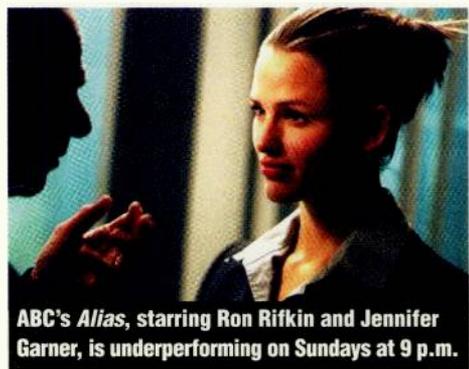
The gnarly SOB is an incredible guitarist, and he's written dozens of songs that knock you on your ass.

Never so desperate for a hit that he and his cohorts bring in some bubble gum pop producer to craft something radio friendly. Is he a geriatric? Technically. But what's he supposed to do - dig a six-foot hole and throw himself in? Hell, at some point he probably did. You don't like him, you think he can't rock because he's pushing 60 - guess what? He doesn't give a shit.

Rolling Stone

10 million viewers and a rating of 4.5/9 among adults 18-49. ABC executives are frustrated at *Alias*' lack of growth this season. But they believe it has less to do with the success of *The Sopranos* than with their own failure to adequately promote the series. "There should be room for a show to break out there, and the issue for us is how to get more people to sample it," said Jeff Bader, executive vp at ABC Entertainment.

Bader even avoids crediting *The Sopranos* with some of the success *The Practice* is enjoying this season. The top-rated series in its time slot, its three-week average in total viewers is 13.7 million, with a 5.5/14 in adults 18-49. But Bader added that ABC's research indicates that more viewers are migrating to *The*



ABC's *Alias*, starring Ron Rifkin and Jennifer Garner, is underperforming on Sundays at 9 p.m.

Practice from NBC than from HBO at 10 p.m.

In fact, the night's biggest shocker may have been last Sunday's decline of NBC's *Boomtown*. In its third airing last Sunday, the critically praised drama dropped 29 percent from its *Criminal Intent* lead-in among total viewers (10.44 million) and 27 percent among adults 18-49 (3.8/9). Mitch Metcalf, senior vp of scheduling for NBC, acknowledged that *Boomtown* "requires an incredible amount of viewer attention, and there has been some hesitance to jump into it."

Metcalf also said he hopes to see a ratings spike for *Criminal Intent* when *The Sopranos* ends in December. But don't count out HBO just yet. The third season of its popular *Six Feet Under* begins in March—just in time to mess up ratings in the May sweeps.

Until then, the pay cable net will be running a new season of *Oz* starting in January—the prison drama has occupied the 10 p.m. slot. But unencumbered by advertisers' content concerns, who's to say HBO won't program more aggressively? And that question underscores HBO's lasting effect on the night—even with its limited distribution.

"Clearly, the dominance that once was Sunday night for the networks has been impacted," said Rino Scanzoni, president of the broadcast division for Mediaedge:CIA. ■

Crystal-Balling the Fall

Agencies predict major prime-time hits, misses; is NBC's *In-Laws* next to go?

NETWORK TV By John Consoli

In their analyses of this fall's crop of prime-time network shows, the media buying agencies did a pretty good job of picking the big successes and disasters. Most agreed that CBS' *CSI: Miami* and *Still Standing* would succeed, as would WB's *Everwood* and ABC's *8 Simple Rules*. And they are. Most also agreed that ABC dramas *Push*, *Nevada* and *That Was Then* would be cancelled early. And they were.

So if their instincts were right, the next prime candidate for cancellation, according to the agencies, should be NBC's sitcom *In-Laws*. Carat, Campbell Mithun, Starcom, Zenith and OMD all predicted before the start of the season that *In-Laws* would get an early heave-ho. Indeed, NBC's new sitcom most recently recorded only a 4.9 in households and a 2.5 in adults 18-49 in its Tuesday 8 p.m. time slot, according to Nielsen Media Research data.

Another new NBC comedy, *Hidden Hills* (Tuesdays at 9:30), was also earmarked for ear-

ly extinction by Starcom, Zenith and Campbell Mithun, although OMD and Carat believe it will survive. Currently, the show is struggling, having fallen from a 10.5 household rating debut to a 6.6 in four weeks, and from a 7.4 to a 4.4 in adults 18-49.

Two WB sitcoms also targeted for early extinction by the agencies—*Greetings from Tucson* (Fridays, 9:30), and *Family Affair* (Thursdays, 8 p.m.)—have been given full-season orders by the network despite ratings shortfalls.

New CBS Sunday sitcom *Bram & Alice* (Sundays, 8:30) was also picked to fail by OMD, Zenith, Campbell Mithun and Starcom, but since only two episodes have aired, it's too early to tell its fate. Household ratings fell from a 7.1 to a 6.7 in the first two weeks.

One show that was picked by most media agencies, as well as by TV critics, to succeed—NBC's Sunday drama *Boomtown*—is showing some cracks after an impressive start (*see related story above*). ■

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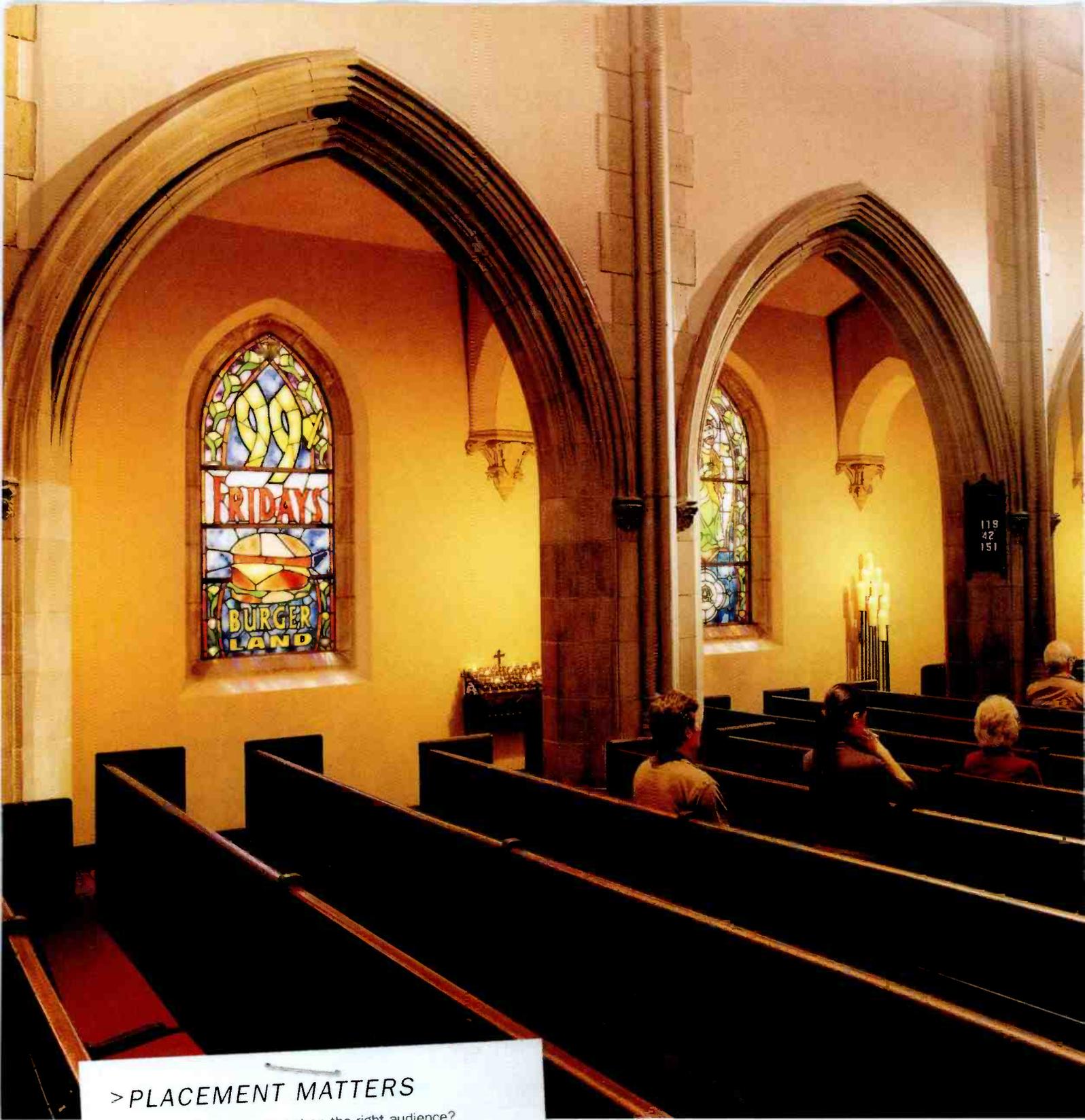
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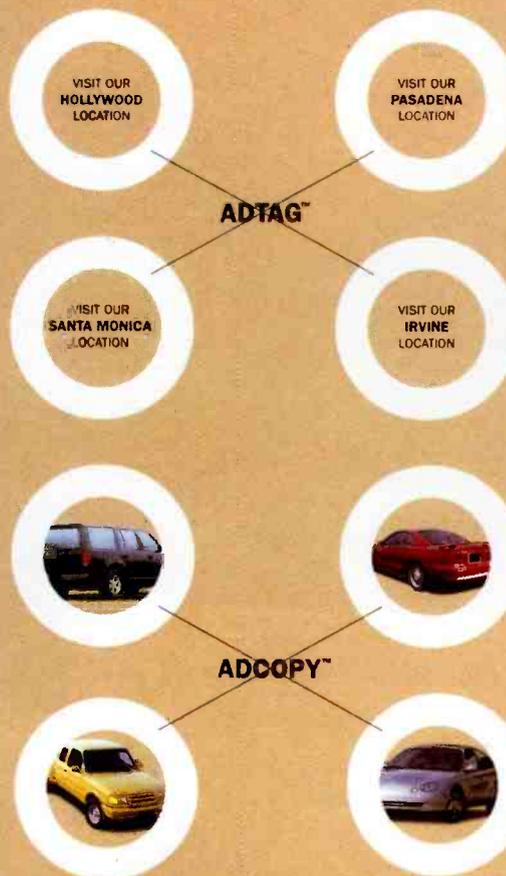
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Local Media

TV STATIONS | NEWSPAPERS | RADIO STATIONS | OUTDOOR | MAGAZINES

ROCHESTER, N.Y. CABLE

Time Warner Cable Testing Digital Recorder

BY RICHARD ZITRIN

Two months ago, Time Warner Cable chose Rochester, N.Y., to roll out a new revenue generator, a TiVo-like device that gives TV viewers more control over what they watch and when they watch it.

Despite a soft launch and little marketing, several thousand digital cable TV customers are now paying \$9.95 apiece each month to rent the digital video recording (DVR) device, which allows viewers to record, pause, instant replay, and rewind live programming.

"They're being very well received," said

tap for this new service. The cable company presently has 3.9 million digital customers among its 10.8 million subscribers nationwide, including 130,000 digital customers in its 325,000-subscriber Rochester system.

Competition from satellite and microwave dish companies is growing in Rochester, as it is nationally, which has motivated cable operators like Time Warner to introduce new services like its Rochester recorder and the video-on-demand (VOD) service it announced in New York City last week. As of July, 40,000 homes in the Rochester market had direct broadcast satellite service compared to 34,800 the previous year and 24,500 two years ago, according to Nielsen Media Research.

Rochester has long been a test market for TWC, where the operator is currently conducting a technical test of Internet Protocol (IP) telephony. TWC also chose Rochester to launch its first 24-hour regional news channel back in 1990. Since then, local news channels, including NY1 News, have been launched in other TWC markets.

"Rochester seems to be a great place to test," said Wirth. "It's a multi-cultural market with broad demographics. I think it gives us a good sense of how products may be received across the country."

And TWC now is prepared to see how well another product that has been offered on a limited basis in Rochester will play in the company's largest market. TWC will soon offer a two-tier VOD service in New York City. Movies-on-Demand allows customers to pay to view movies selected from a menu of up to 100 titles, akin to ordering a movie in a hotel room. Subscription-Video-on-Demand (SVOD) gives viewers access to past programming from the libraries of HBO,

Showtime and other nets.

TWC introduced Movies-on-Demand in Hawaii; Tampa, Fla.; and Austin, Texas; and SVOD in Columbia, S.C., said Harrad.

The video-on-demand services will be available to half of TWC's 500,000 New York City digital cable customers by the end of the month, and the rest by the end of the year, said Harriet Novet, representative for TWC in New York City. Video-on-demand services are also about to be offered throughout the entire Rochester TWC market, Wirth said.

However, Rochester media buyer Tracy Till of Butler/Till Media Services is not turning cartwheels just yet over the digital recording capability. "I don't see cable reaping any big benefits from this one venue until it gets more mainstream and the adoption rates are quite high," said Till. Although TWC promotes the service as being easy to operate, Till countered that some technology is still just too advanced for most consumers.

"A lot of people can't even program their VCRs," said Till. "Will [digital recording] change consumers' usage of cable? No. Will it allow people to be more selective in their programming? Yes. But I think it has a ways to go before it gets adopted."

CABLE/RADIO

Turner South Boosted By Rick & Bubba Show

After less than a month on Turner South, the regional cable network owned by AOL Time Warner, the *Rick & Bubba* show, one of the hottest morning shows in syndicated radio, has already started to attract national sponsors that not only want to advertise on cable, but on radio as well. Foreign automaker Suzuki last week signed on for both TV and radio schedules, and two other advertisers are ready to follow suit.

The show's cable run is also leading to the signing of more radio affiliates. "This is going to help us get exposure for the show in markets we're not in. It's good synergy," said Kerry Lambert, operations manager for Citadel's radio stations in Birmingham, Ala., who also handles syndication for the radio show.

Turner South added a simulcast (8 to 10 a.m.) of the *Rick & Bubba* show in September in an effort to spice up its growing menu of home-cooked southern programming. It's the first daily show for the 3-year-old network



II Paused

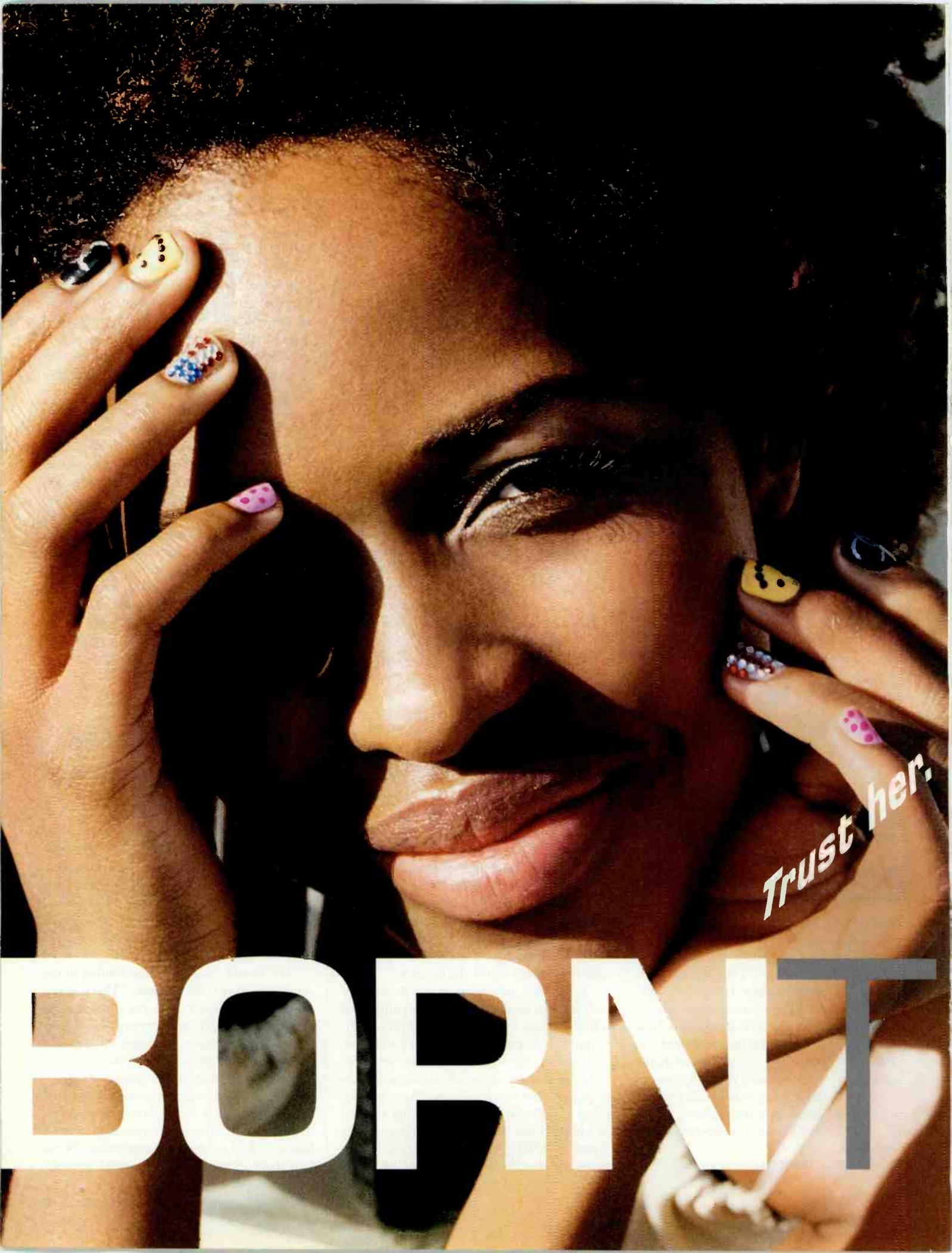
8:00 - 9:00pm

Digital subs in Rochester can pause and resume programming.

Brian Wirth, vp of TWC's Rochester division, about the digital recorder, which stores up to 40 hours of recordings on an 80-gigabyte hard drive inside of TWC's digital set-top box. However, unlike TiVo, the TWC service does not allow viewers to skip ads.

Since launching the service in upstate New York in August, TWC also has introduced it in Green Bay, Wis., with plans to launch the product to roughly half of TWC's 34 divisions by the end of the year, according to Mark Harrad, vp of corporate communications. TWC has 7,000 DVR customers in Rochester and Green Bay.

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MAGAZINE

O LEAD

and its third original effort this year.

"We wanted something with a signature personality. And the more frequently we could get something on the air, the better," explained David Rudolph, vp and general manager of Turner South.

Since writing the cable netlet's business plan more than three years ago, Rudolph has worked to differentiate Turner South from other regional cable services, which tend to concentrate on a single theme such as sports or news. Turner South reaches 6.5 million subscribers across six states and offers a broad range of programming from music shows such as *Live from The Bluebird Cafe* to *Liars and Legends*, a biography program that focuses on the people and products that have shaped the south's history. The network also broadcasts 35 Atlanta Braves baseball games (the Braves are also owned by AOL Time Warner).

Turner South nets about \$30 million in annual revenue. But to grow further, the network needed a daily show. "We can start to



Turner South stars Rick Burgess and Bill "Bubba" Bussey

hit people with consistent viewing patterns, and that helps advertising," Rudolph said.

Rick & Bubba is broadcast out of WYSF-FM in Birmingham, Ala., and is syndicated on 23 radio stations across the southeast, many of which are in the same markets reached by Turner South. Among radio audiences, Rick Burgess & Bill "Bubba" Bussey consistently pull solid ratings with their humorous family-friendly commentary about daily life. The down-home duo, who often refer to themselves as "the two sexiest fat guys alive," are No. 1 in mornings overall, No. 1 among adults 25-54, and No. 1 among adults 18-49 in Birmingham.

"There's really nothing quite like them," said Michael Perry, president of Perry Harp-

er & Perry Communications, who has advertised on *Rick & Bubba* for Birmingham-based clients such as Marvin's Building Materials and Home Centers and Jack's, a fast food restaurant. "If they're as entertaining on Turner as they are on radio, it will do well. It could bring in more national and regional sponsors," said Perry. —*Katy Bachman*

CINCINNATI RADIO

Salem's Hail Mary

WBOB-AM, an ESPN Radio affiliate in Cincinnati owned by Salem Communications, faces an uncertain future. Not only is the station's format a departure for Salem, which focuses on religious and family-themed programming, but WBOB, affectionately known as Bob, is up against some monster competition from Clear Channel Communications, which owns WLW-AM, the No. 1-rated station in the market with an 11 overall share, and All Sports WCKY-AM. Between the two stations, Clear Channel has locked up the major broadcast sports rights, airing the Cincinnati Reds baseball on WLW and the Cincinnati Bengals football on WCKY.

"We're looking at all our options for WBOB," admitted Donald Lambert, who on Oct. 11 was named general manager of WBOB in addition to managing Salem's WTSJ-AM, know in the market as Cincinnati's Christian Voice.

One option could be a sale. Just two weeks ago, Salem closed its deal to sell Country WYGY-FM to Susquehanna Radio for \$45 million. At the time, Edward Atsinger, president and CEO of Salem, said the station was sold because it was "a nonstrategic format." Salem purchased both WYGY and WBOB from Clear Channel in August 2000 when Clear Channel was forced to divest stations in order to close its deal to acquire AMFM.

But Lambert insists the company could just as easily end up keeping WBOB and improving on it. "Previously our focus was on the FM station, now we can focus on WBOB," he said. "ESPN is probably one of the best brands in the country. We need to segue off the brand and make sure we're positioned as a Cincinnati station."

While Clear Channel may have the two major sports teams, both WTSJ and WBOB

have made a practice of airing high school sports and providing play-by-play for colleges, such as Ohio State University football and baseball and Northern Kentucky University. Lambert also wants to add more-frequent local sports news and updates.

The biggest challenge, however, could be advertising. While most Sports stations get the bulk of their revenue from alcohol and beer ads, lotteries and strip clubs, Salem has a strict policy of not accepting such advertising. "That makes our mission challenging," Lambert said, adding that the station will take responsible drinking ads from beer companies such as Anheuser Busch. —*KB*

PHOENIX TV STATIONS

Culliton to Helm KNXV

John Culliton last week took over as vp and general manager of E. W. Scripps Co.'s KNXV-TV in Phoenix. Culliton had served as consultant at the ABC affiliate for the past year.

Culliton takes over a station that has been hovering in the fourth or fifth spot in the market. "We do have some work to do. The opportunity to grow in a market like Phoenix is much better than in a static one," said Culliton. Currently the nation's No. 16 DMA, Phoenix's population is growing at a rate of about 200,000 people per year and is expected to be a top-10 DMA within four to seven years, said the new gm. The area's large Hispanic TV audience will be a key part of the station's future, added Culliton.

Culliton, who has earned accolades in the past for his work in revamping CBS outlets KCBS-TV in Los Angeles and WCCO-TV in Minneapolis by introducing stronger investigative news, plans to do the same with KNXV. Culliton has already hired several investigative staffers for the station.

His efforts will also include a clearer branding strategy around the ABC 15 name, which Culliton said tightens its integration with ABC. "You feel like you have a sense of pride as a station when you view our programs in concert with their shows," he said.

On the entertainment front, Culliton noted KNXV recently inked a syndication deal with King World to broadcast *Wheel of Fortune* and *Jeopardy* sometime in the near future, a move that he believes will have a positive impact on the station's overall ratings performance. —*Sandy Brown* ■

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Come to Us to Get to Them

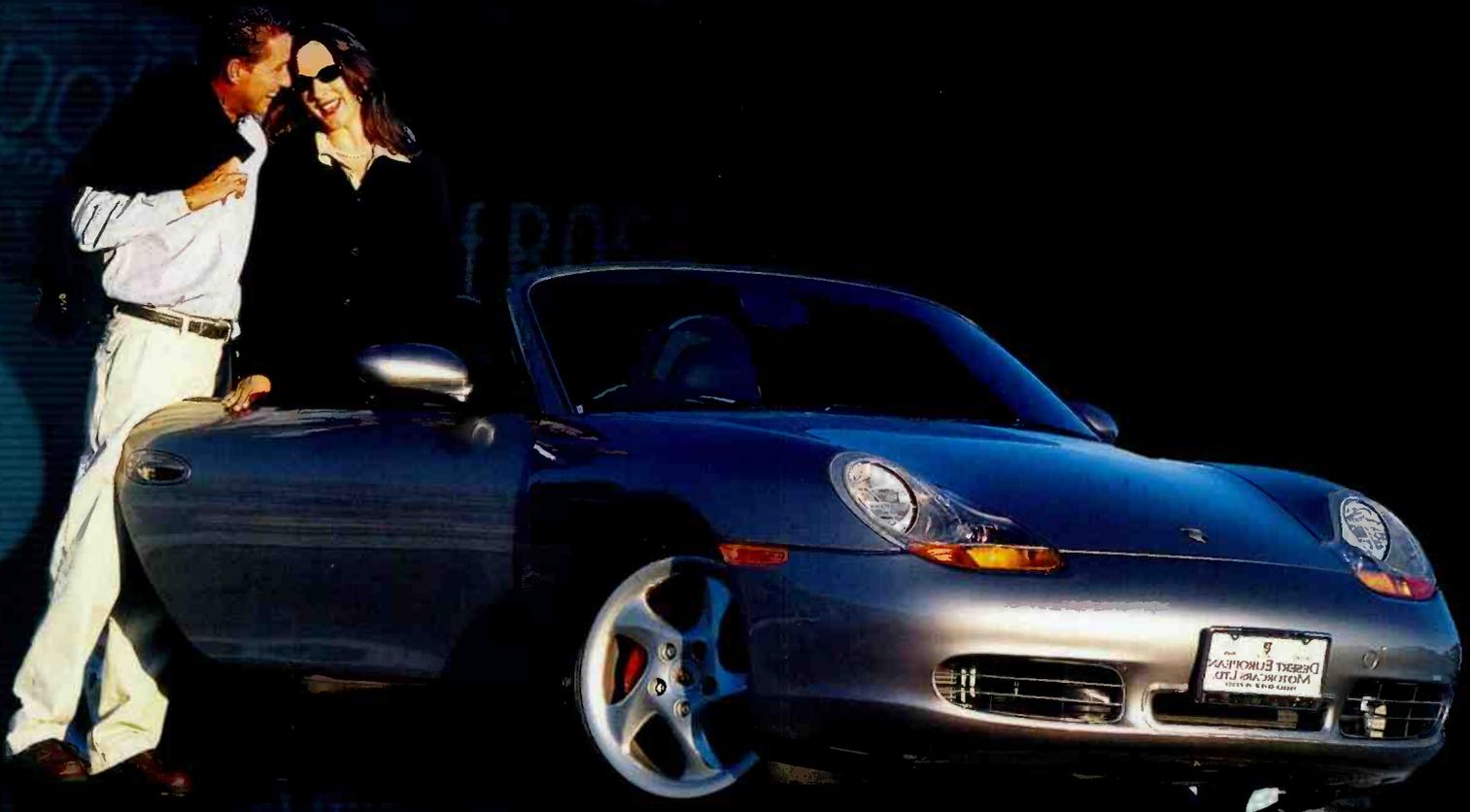
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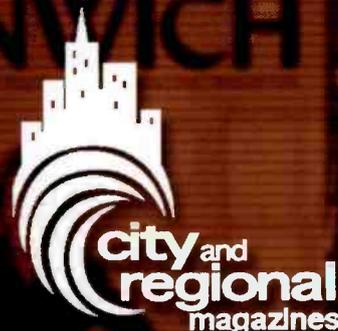
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- 32% in top management*
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*Edros & Morgan study



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Market Profile

BY EILEEN DAVIS HUDSON



Cleveland rocks: The country's No. 15 TV market is home to the Rock and Roll Hall of Fame (center).

COURTESY OF THE CONVENTION & VISITORS BUREAU OF GREATER CLEVELAND

Cleveland

BEYOND BEING THE HOME OF THE ROCK AND ROLL HALL OF FAME, CLEVELAND IS ALSO known for the less sexy, but economically vital, polymer industry. Polymer Valley, the corridor that stretches from Cleveland's city limits to nearby Akron, Ohio, is among the nation's leading centers for polymer research

and development, and the headquarters of more than 1,200 companies that manufacture an extensive array of rubber and plastics products. The area also continues to rank among the top markets in the nation for small-business ownership.

While Cleveland is the main city in the market, Akron's industry is considerable, and the TV stations in the 15th-ranked Cleveland-Akron market (1.53 million TV households) continually struggle to find the appropriate balance to cover the Akron-Canton area, which represents a third of the DMA.

"You would never want to ignore it, but I think we are all challenged, in terms of resources, to give it the coverage it deserves," says Ric Harris, vp/general manager of Scripps Howard Broadcasting's ABC affiliate WEWS.

WEWS and WJW, Fox Television Stations' owned-and-oper-

ated outlet, are generally locked in an extremely tight race for No. 1 in news. WJW, a one-time CBS affiliate, won the 5 p.m. news race in households in the July sweeps but finished second behind WEWS at 6 p.m. Counting its hour-long 10 p.m. late news against its rival 11 p.m. newscasts, WJW wins the late-news contest by a wide margin in household ratings. WEWS gets some help through its news partnership with Akron's leading daily newspaper, the *Akron Beacon Journal*, with cameras, a reporter and photog-

rapher based in the paper's newsroom.

Michael Renda, WJW vp/gm, says his station has been No. 1 in the key adults 25-54 demo in every news daypart—mornings, noon, 5 p.m., 6 p.m. and 10 p.m.—for the last two years. On the programming front, WJW picked up *Dharma & Greg* in September, which it is double-running at 7 p.m. and 11 p.m.

One interesting change that has caused a significant shift in Cleveland's broadcast TV landscape happened when Gannett Co.'s NEC affiliate WKYC-TV rolled out *Dr. Phil* at 5 p.m. in September. Although the show had generated considerable buzz before its debut, its meteoric success shocked many in the market. Instead of being third in the time period (most recently with *Crossing Over With John Edwards*), WKYC now finds itself in a virtual three-way tie for first with the local 5 p.m. newscasts on WEWS and WJW. "It has had a greater impact than any of us in the market anticipated," concedes WEWS' Harris.

However, Harris has taken steps to keep his 5 p.m. news fresh, including luring away Stefani Schaefer, longtime morning anchor on WJW's top-rated morning show. By adding her to the 5 p.m. anchor desk last month, Harris created Cleveland's first three-person anchor team. Harris has also steered the newscasts away from reporting on soft news items.

In morning news, Harris says the station's *Good Morning Cleveland* from 6 a.m. to 7 a.m. was recently split into two half hours and retitled *Good Morning Cleveland 6* and *Good Morning Cleveland 6:30*. In July, the first half hour grew 14 percent in household share compared to the same period the year before. The second half hour jumped 22 percent. In August, WEWS reporter Adam Shapiro was promoted to co-anchor the morning news, while his predecessor, Brad Harvey, became a hard-news reporter for the station.

In 2001, Akron got its first dedicated local TV newscast in five years. The 6:30 p.m. news is produced by WKYC as part of its joint sales agreement with Paxson Communications' Cleveland O&O WVPX, on which it airs.

Raycom Media has a duopoly in the market with CBS affiliate WOIO and UPN affiliate WUAB. WOIO continues to try to find its way in the market after it swapped affiliation in the mid-1990s, which was followed by a series of staff changes. The station ranks fourth in local news. WUAB

NIELSEN MONITOR-PLUS

AD SPENDING BY MEDIA / CLEVELAND

	Jan.-Dec. 2000	Jan.-Dec. 2001
Spot TV	\$317,156,093	\$299,498,512
Local Newspaper	\$208,345,413	\$196,948,546
Outdoor	\$14,535,911	\$17,027,426
Total	\$540,037,417	\$513,474,484

Source: Nielsen Monitor-Plus

Market Profile

carries an hour-long 10 p.m. newscast that runs well behind leader WJW.

However, both stations have revamped their entertainment lineups this fall. WOIO added *The Wayne Brady Show* at 9 a.m. and *The Caroline Rhea Show* at 10 a.m., along with *Who Wants to Be a Millionaire* at 7 p.m. and *Will & Grace* at 7:30 p.m. WUAB picked up *Beyond with James Van Praagh* at 9 a.m. and *The John Walsh Show* at 11 a.m., along with *That '70s Show* at 6:30 p.m. WUAB will also carry 20 Cleveland Cavaliers National Basketball Association games this season. WUAB used to carry some Indians Major League Baseball games, but starting this season all the "Tribe" games aired on Fox Sports Net. Three preseason games for the National Football League's Browns were carried by WKYC.

Winston Broadcasting's WB affiliate WB-NX, licensed in Akron, does not produce local news. The station has done well, however, with its double-run of *Everybody Loves Raymond*, which it acquired last fall. The market also has a Univision Communications O&O in WQHS-TV, which launched in June 2001.

The financially embattled Adelphia Communications is the Cleveland area's primary cable television provider. The company has taken control of the cable market over the past few years, having purchased Cablevision's systems in Cleveland in November 2000. Cablevision had been one of the largest MSOs in the market. Adelphia currently represents about 650,000 of the approximately 1.1 million cable homes in the DMA, with most of its customers located in the five-county metro area, says Nancy Fry, director of advertising for Adelphia Media Services, Cleveland/Erie. Time Warner has roughly 350,000 subscribers in the market, with a handful of other cable companies carving out smaller pockets of subscribers.

When Adelphia took over the Cablevision systems, it also took control of the local cable interconnect, then called Northern Ohio Interconnect. Adelphia's ad-sales arm, Adelphia Media Services, handles local sales for itself and several small cable systems through a soft (non-wired) interconnect. Time Warner handles its own ad sales. National Cable Communications' CableLink is the market's hard interconnect for national ad sales.

On Oct. 14, Adelphia rolled out the 24-hour cable news channel Ohio News Network to about 300,000 Cleveland-area homes on channel 70 and channel 65 in some areas. The deal expands ONN's reach to 1.3 million households in Ohio. For Greater Cleveland, the network will feature a live morning newscast from 6 a.m. to 9 a.m. and also intends to

RADIO OWNERSHIP

OWNER	STATIONS	Avg. Qtr.-Hour Share	Revenue (in millions)	Share of Total
Clear Channel Communications	1 AM, 5 FM	34.6	\$53.4	44.8%
Infinity Broadcasting	4 FM	20.6	\$32.3	27.1%
Radio One	1 AM, 2 FM	12.3	\$12.0	10.1%
Salem Communications	2 AM, 1 FM	5.1	\$5.1	4.3%
WCLV Foundation	1 FM	1.5	\$2.4	2.0%
Elyria-Lorain Broadcasting	2 FM	4.8	\$1.4	1.2%

Includes only stations with significant registration in Arbitron diary returns and licensed in Cleveland or immediate area. Ratings from Arbitron Spring 2002 book; revenue and owner information provided by BIA Financial Network.

NEWSPAPERS: THE ABCS

	Daily Circulation	Sunday Circulation	Daily Market Penetration	Sunday Market Penetration
Cuyahoga County: 567,966 Households				
<i>The Plain Dealer</i>	269,847	349,257	47.5%	61.5%
Summit County: 219,080 Households				
<i>Akron Beacon Journal</i>	100,730	132,995	46.0%	60.7%
<i>The Plain Dealer</i>	18,694	23,412	8.5%	10.7%
Lorain County: 104,561 Households				
<i>The (Lorain) Morning Call</i>	26,406	28,858	25.3%	27.6%
<i>The (Elyria) Chronicle-Telegram</i>	26,278	27,809	25.1%	26.6%
<i>The Plain Dealer</i>	16,697	23,749	16.0%	22.7%
Lake County: 90,162 Households				
<i>Lake County News Herald</i>	36,579	45,597	40.6%	50.7%
<i>The Plain Dealer</i>	21,528	29,997	23.9%	33.3%
Portage County: 55,793 Households				
<i>Ravenna Record-Courier</i>	16,868	17,887	30.2%	32.1%
<i>Akron Beacon Journal</i>	9,687	16,429	17.4%	29.4%
<i>The Plain Dealer</i>	6,784	10,071	12.2%	18.1%
Medina County: 54,497 Households				
<i>The Plain Dealer</i>	11,638	20,353	21.4%	37.3%
<i>Akron Beacon Journal</i>	7,971	12,621	14.6%	23.2%
<i>The (Delaware) Gazette</i>	14,417		26.5%	
Geauga County: 31,557 Households				
<i>The Plain Dealer</i>	9,373	13,293	29.7%	42.1%
<i>Lake County News Herald</i>	5,857	6,534	18.6%	20.7%
<i>(Ashtabula) Star-Beacon</i>	751	589	2.4%	1.9%

Source: Audit Bureau of Circulations

launch several Cleveland-focused programs throughout the week. ONN, which has a news affiliation with WOIO, launched in May 1997 as the country's first 24-hour statewide news channel. The regional network is owned by Columbus, Ohio-based Dispatch Printing Co.

Cable penetration in the DMA is 72 percent, compared to the national top-50 market average of 69 percent, according to Scarborough Research (see *Scarborough chart on page 16*). The percentage of homes hooked up to

satellite service is 12 percent, which falls slightly below the top-50 market average of 15 percent, according to Scarborough.

In newspaper publishing, *The Plain Dealer*, part of the Newhouse-owned Advance Publications family, is the city's only daily and the largest newspaper in the region with a 368,322 daily circulation and 479,353 Sunday circulation for the six months ended March 31, according to the Audit Bureau of Circulations. The paper's daily circulation average rose 1.3 percent compared to the same period in 2001,

NIELSEN RATINGS / CLEVELAND

EVENING AND LATE-NEWS DAYPARTS, WEEKDAYS

Evening News

Time	Network	Station	Rating	Share
5-5:30 p.m.	Fox	WJW	7.8	18
	ABC	WEWS	7.2	16
	NBC	WKYC*	3.0	7
	CBS	WOIO	2.2	5
	UPN	WUAB*	1.6	4
	WB	WBNX*	1.3	3
	Pax	WVPX*	0.7	2
5:30-6 p.m.	Fox	WJW	7.8	18
	ABC	WEWS	7.2	16
	NBC	WKYC*	3.4	8
	UPN	WUAB*	2.6	6
	CBS	WOIO	2.1	5
	WB	WBNX*	1.2	3
	Pax	WVPX*	0.7	2
6-6:30 p.m.	ABC	WEWS	8.6	18
	Fox	WJW	8.4	17
	NBC	WKYC	5.0	10
	UPN	WUAB*	3.7	8
	CBS	WOIO	3.0	6
	Pax	WVPX*	1.2	3
	WB	WBNX*	1.2	2
6:30-7 p.m.	Fox	WJW	8.4	17
7-7:30 p.m.	NBC	WKYC	4.9	10

Late News

10-11 p.m.	Fox	WJW	9.3	15
	UPN	WUAB	2.7	4
11-11:30 p.m.	NBC	WKYC	8.1	15
	ABC	WEWS	7.3	14
	Fox	WJW*	4.6	9
	CBS	WOIO	4.4	8
	UPN	WUAB*	2.9	5
	WB	WBNX	1.6	3
	Pax	WVPX*	0.8	1

*Non-news programming Source: Nielsen Media Research, July 2002

while its Sunday circulation was flat.

This past spring, the *Plain Dealer* dropped six of its older comic strips and added six brand-new ones, causing a uproar among some readers who were upset about losing their beloved comics, particularly *Spiderman* and *Judge Parker*. "They've been around for years, and they have a very loyal following," says Doug Clifton, *Plain Dealer* editor in chief. So, after a slew of calls and e-mails from incensed comics readers, the *Plain Dealer* decided to make peace and restored the strips. However, *Spiderman* and *Judge Parker* were not returned to the comics page in Arts & Life, but rather placed in the paper's black-and-white classified section. The move appeased most readers, but some still complained that they should be put back with the other comics.

Among other changes made this year, the *Plain Dealer* added a new home and garden section called Inside & Out. Clifton says the paper also "substantially expanded our week-end section." Called Friday, the tabloid-formatted section averages between 80 and 90 pages and now puts an even greater focus on Cleveland nightlife, along with its regular entertainment fare such as movie and restaurant reviews.

In mid-July, the daily also expanded its fashion section (part of its daily Arts & Life features section) by adding six columns to the existing six it usually features. Clifton says reader and advertiser interest fueled the decision to expand the coverage of fashion in the paper's pages.

While the *Plain Dealer* may be the largest paper in Cleveland, it is by no means the only choice for print buyers. Some consider the Akron-Canton area as its own discrete market. The paper that dominates the area is Knight Ridder's *Akron Beacon Journal*, which had a daily circulation average for the six months ended in March of 143,429, flat compared to the same period a year ago; its Sunday circulation of 142,941 reflected a 3.4 percent decline year-over-year. In Cleveland's five-county metro area, the *Plain Dealer* and the *Beacon Journal* compete head-to-head in Medina County (see ABC chart on page 14). Outside the Cleveland metro area, the *Beacon Journal* reigns in Summit County (where Akron is located), where it has a 46 percent county penetration daily and about 60 percent on Sundays. The *Beacon Journal* does not have a significant penetration in Cuyahoga County, where Cleveland is located and where the *Plain Dealer* dominates.

The market also has a number of suburban papers, including Sun Newspapers, a chain of 25 weeklies with a combined (paid and non-paid) circulation of 239,000. The papers, pub-

lished every Thursday, serve Cuyahoga, Geauga, Lorain, Medina and Summit counties. The group's largest penetration is in Cuyahoga County, with a combined weekly circulation of 153,891, or 27.1 percent county penetration, according to the ABC.

Detroit-based Crain Communications' *Crain's Cleveland Business*, which is published on Mondays, is the region's only business newspaper. Cleveland's alternative weeklies have caused some buzz of late. In the first week of October, Village Voice Media shuttered its *Cleveland Free Times*, which had reported a free circulation of 90,000 and had a staff of about 50 people. The deal leaves New Times' *Cleveland Scene* as the sole alternative weekly and has raised the ire of some in the market who believe an important media voice was silenced. In exchange for the Voice shutting down the *Cleveland Free Times*, New Times agreed to pull the plug on its *New Times LA*, which had competed against the Voice's *LA Weekly*. In addition, the Voice also put up a reported \$8

million to cinch the deal with New Times.

"I am very sorry that we will be closing *Free Times*. It is a well-written, feisty and respected newspaper in the Cleveland community that has been locked in a very competitive battle for some years, in which neither side was able to gain the upper hand," said Village Voice Media CEO David Schneiderman in a staff memo. "But when the opportunity arose to consolidate and strengthen our position in L.A., it was my judgment that the deal was just too attractive to pass up."

Arbitron this year classified the country's 25th-ranked radio market as one of its embargoed markets, so no ratings data for Cleveland stations is being released to the media, said company representative Thom Mocarisky.

Clear Channel Communications dominates Cleveland radio with a commanding 44.8 percent advertising market share, based on an estimated \$53.4 million in revenue for its six local stations, according to BIA Financial Network (see *Radio Ownership chart on page*

Market Profile

14). Infinity Broadcasting, Radio One and Salem Communications also have significant presences in the market.

One legendary station in the market is WCLV-FM, the market's sole Classical station. Cleveland Classical Radio LLC owns the station, which will celebrate its 40th anniversary on Nov. 1. Last November, Richard Marschner, executive vp/gm of Cleveland Classical Radio, and his partner, Robert Conrad, who remains president of the company and a member of its board of directors, gave the station to the nonprofit WCLV Foundation rather than risk it being swallowed up by a large radio conglomerate. "That's the only way you can be sure that the station's going to survive as a Classical station," says Marschner.

In July 2001, WCLV initiated what would end up being a seven-station frequency change that turned Cleveland radio upside down. "There were a lot of lost listeners that day," says Marschner. "It was mayhem."

Among the stations that were shuffled around in the frequency swap—which included Cleveland Classical Radio, Clear Channel and Salem Communications—WCLV swapped its 50,000-kilowatt frequency at 95.5 in exchange for CC's much-lower-powered signal on 104.9 (licensed in suburban Lorain, Ohio).

Cleveland Classical also picked up a second station, 1420 AM, in the three-way deal that saw Salem end up with the 95.5 frequency. Cleveland Classical had planned to simulcast the 1420 AM station, now called WCLV-AM, with its FM sibling. However, once Classical learned of Salem's intention to drop the Adult Standards format on one its newly acquired stations, Marschner says the decision was to put the Adult Standards format on WCLV-AM to keep it alive in the market.

Infinity has greatly expanded its presence in Cleveland in the last two years. The company added Alternative station WXTM-FM, Soft Adult Contemporary outlet WDOK-FM and Hot AC station WQAL-FM to its Cleveland portfolio, which already included Classic Rock station WNCX-FM. It was the company's launch of WXTM, known as Xtreme Radio, in May 2001, however, that rocked the market. The station continues to climb in share and claims the top post in the men 18-34 demo, beating longtime demo leader WMMS-FM, CC's heritage Rock outlet in Cleveland, says Walt Tiburski, vp/gm of Infinity Cleveland.

In February of this year, a local businessman, Douglas Wilbur, launched the market's first 24-hour, commercial Spanish Variety station, WDLW-AM in Lorain, which he pur-

SCARBOROUGH PROFILE

Comparison of Cleveland

TO THE TOP 50 MARKET AVERAGE

	Top 50 Market Average %	Cleveland Composition %	Cleveland Index
DEMOGRAPHICS			
Age 18-34	31	28	91
Age 35-54	41	40	99
Age 55+	28	31	112
HHI \$75,000+	28	20	71
College Graduate	12	11	88
Any Postgraduate Work	11	8	72
Professional/Managerial	123	19	83
African American	13	14	109
Hispanic	13	#	#
MEDIA USAGE - AVERAGE AUDIENCES*			
Read Any Daily Newspaper	56	63	114
Read Any Sunday Newspaper	64	73	115
Total Radio Morning Drive M-F	22	23	104
Total Radio Evening Drive M-F	18	19	104
Total TV Early Evening M-F	29	31	107
Total TV Prime Time M-Sun	38	40	105
Total Cable Prime Time M-Sun	13	17	126
MEDIA USAGE - CUME AUDIENCES**			
Read Any Daily Newspaper	74	81	109
Read Any Sunday Newspaper	77	86	111
Total Radio Morning Drive M-F	75	76	101
Total Radio Evening Drive M-F	73	75	103
Total TV Early Evening M-F	71	71	100
Total TV Prime Time M-Sun	91	92	101
Total Cable Prime Time M-Sun	59	63	107
MEDIA USAGE - OTHER			
Accessed Internet Past 30 Days	58	53	91
HOME TECHNOLOGY			
Own a Personal Computer	68	62	90
Purchase Using Internet	37	33	87
Connected to Cable	69	72	105
Connected to Satellite/Microwave Dish	15	12	82

#Respondent count too low to report. *Media Audiences-Average: average issue readers for newspapers; average quarter-hour listeners within a specific daypart for radio; average half-hour viewers within a specific daypart for TV and cable. **Media Audiences-Cume: 5-issue cume readers for daily newspapers; 4-issue cume readers for Sunday newspapers; cume of all listeners within a specific daypart for radio; cume of all viewers within a specific daypart for TV and cable.
Source: 2001 Scarborough Research Top 50 Market Report (August 2000-September 2001)

chased from Baldwin Broadcasting. Wilbur also owns WOBL-AM, a Country station. Clear Channel's heritage Rock station WMMS-FM is the flagship radio outlet for the Browns, and WTAM is the radio home of the Indians.

In addition to radio, Clear Channel dominates the outdoor advertising market in Cleveland. Coupled with its inventory in Akron-Canton, which CC tries to sell as one market as often as possible, the company offers about

2,000 30-sheet poster panels and about 300 bulletins. CC has completed about 7 of the 13 new bulletin locations along major highways in the area, including I-77, I-480, I-90 and I-490, as part of a settlement with the city of Cleveland over disputed alcohol-related ads on 8-sheets displays in the inner city. These 8-sheets have since been removed.

Viacom Outdoor and independent Cleveland Outdoor also serve Cleveland's out-of-home business. ■

Adweek Magazines'

Special Report

October 21, 2002



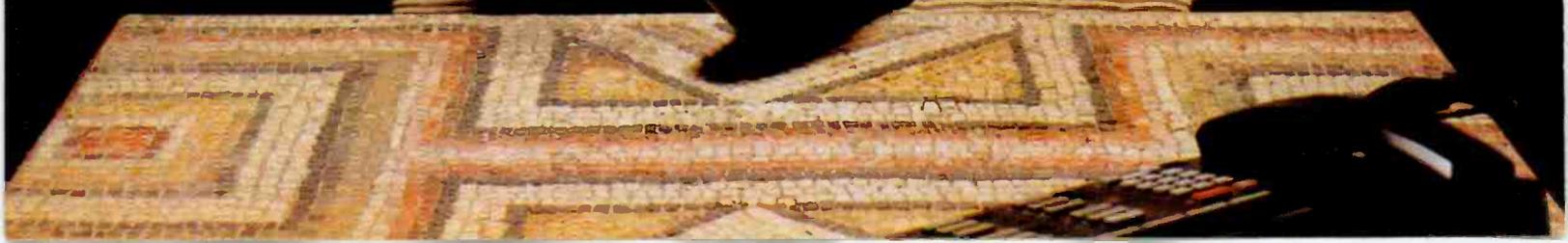
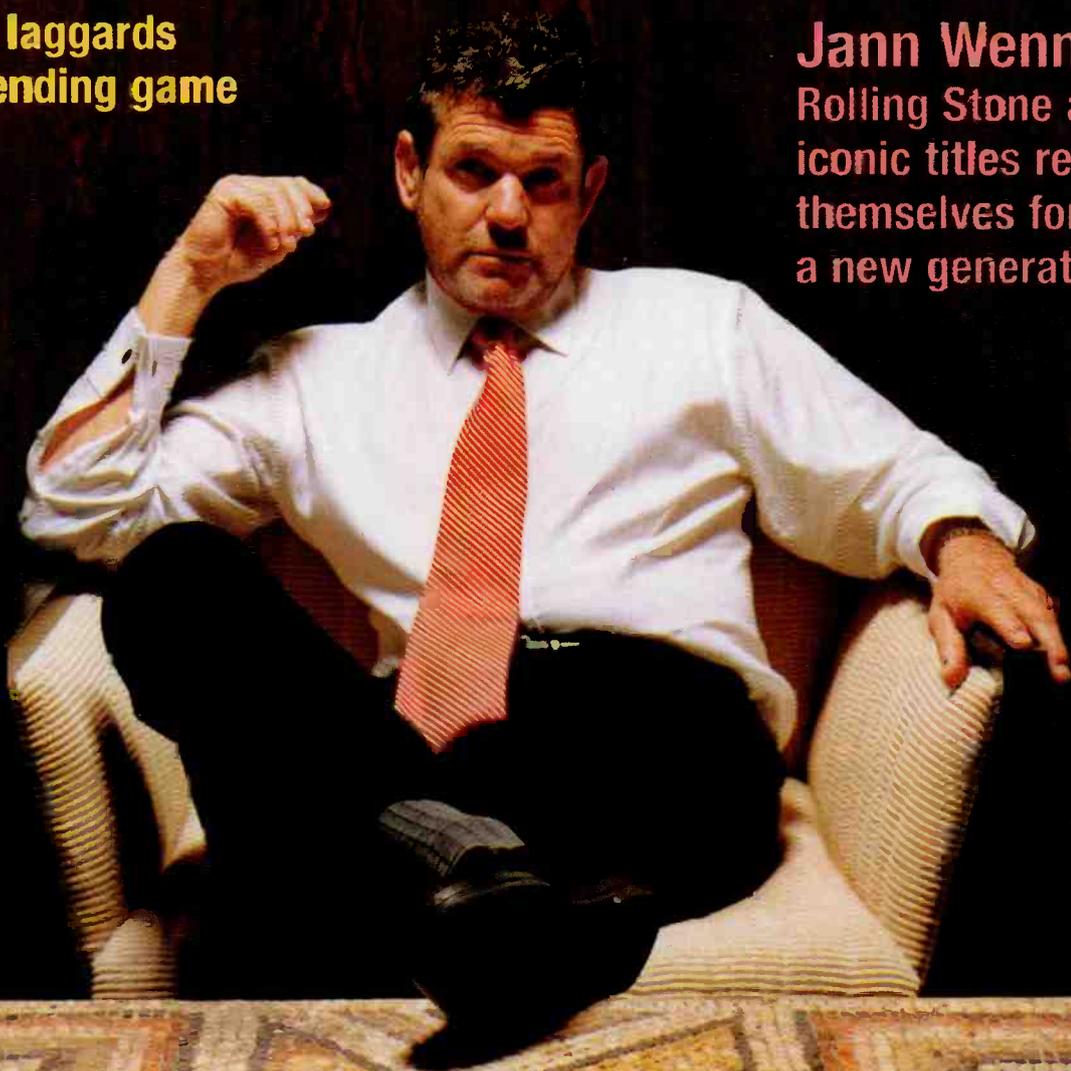
Where the Action Is

Leaders and laggards
in the ad spending game

FALL MAGAZINE ISSUE 2002

Brand New

Jann Wenner's
Rolling Stone and other
iconic titles redefine
themselves for
a new generation



Guideposts® rated #1

Favorite Magazine

Source: MRI Spring 2002



Over 8 million readers have made *Guideposts* a favorite part of their lives

When MRI asked readers of 202 major magazines to name their favorites, *Guideposts* ranked #1 overall.

With the highest reported monthly renewal rate in the industry (76%), and exceptionally high reader involvement, it's no wonder *Guideposts'* rankings were off the charts in the new MRI Involvement Index — the industry's definitive measure of "wantedness." In fact, *Guideposts'* overall rankings were higher than any magazine on your media plan.

Ranked #2 overall out of 202 magazines measured*

- Ranked #1 Favorite Magazine
- Ranked #3 in 4 out of last 4 issues read
- 4th longest read time

With a 2.6 million ABC-audited paid circulation, and a readership of over 8 million, *Guideposts* delivers one of publishing's most involved audiences.

*Source: MRI Spring 2002

To find out how to enjoy the goodwill engendered by one of America's most highly valued magazines, call Associate Publisher Jim Sammartino at (212) 251-8169 or contact the sales representative in your region through our website www.guidepostsmedia.com/contacts.

Guideposts®
America's Source for Inspiration

BOYS TO MEN

Skater and gaming mags score big with target demo

The action has been intense among video game and skateboard magazines aimed at young male readers. Times may be lean, but these mags are fat.

The tightly targeted content of these titles continues to be a magnet to readers and advertisers. Page counts of 250 to 350 are common, and ad revenue continues to grow as quickly as, well, a teenage boy. Almost all the ads tout products directly tied to the magazines' subjects. Since most of the insider marketers have already been tapped, however, the magazines need to figure out how to attract corporate America in order to continue growing, says Jonathan Simpson-Bint, president of Future Media US, publisher of 400,000 circ *PSM*. Publishers are having modest success in broader categories such as snacks, beverages, movies, music and apparel.

But it's not always friendly territory.

Says Lee Uniacke, group publisher of Ziff-Davis game group, which includes 530,000-circ *Electronic Gaming Monthly*: "Our target audience wants immediate, concrete product-oriented information that they can use." Adds Simpson-Bint: "They have no tolerance for b.s."

Skateboarders are just as passionate as gamers. *Thrasher*, an independently owned title sprinkled with antiestablishment attitude, is "the *Mad* magazine of this generation," brags editor Jake Phelps. *TransWorld Skateboarding*, a Time4Media title, positions itself as a "positive" force that parents can be comfortable with, says president Andy Clurman.

Thrasher, with a circulation of 196,000, reports ad revenue is up 25.5 percent this year. *TW Skateboarding* projects a 17 percent ad revenue hike in 2002, with circulation at 177,000.

"Sports are an [ideal] avenue to reach into the kids' world," says Clurman. And the narrower the message, the better. —Joan Voight



LET'S LAUNCH

New magazines take aim at women and children

The most unusual new launch of the season is Viz Communications' *Shonen Jump*. It will offer English-language versions of Japanese comics—and will read from right to left, like its Japanese counterpart, *Shonen Jump Weekly*. The monthly, which debuts Nov. 26, targets kids ages 12 to 17. Cover price for the 100,000-circ magazine is \$4.95. Condé Nast's *Teen Vogue* is "being created with all the same editorial, photographic and production values that you would find in big *Vogue*," says editor Amy Astley, but in a smaller, backpack-friendly 9 1/8 inches x 6 3/4 inches. It debuts in February 2003 with a rate base of 450,000 and a cover price of \$1.50. *Budget Living* "tells you how to maintain your lifestyle, but it also tells you how to accumulate more money," says publisher Don Welsh. The first issue bowed Oct. 8 with a rate base of 300,000 (cover price, \$3.99). Lifetime and Hearst have teamed up for *Lifetime*, a bimonthly whose editorial mix will include standard women's service fare as well as Lifetime-network-style inspirational storytelling. It will launch in March with a rate base of 500,000. Readers of Bauer Publishing Group's weekly *In Touch* will find that "everything is told through celebrities," says editor in chief Richard Spencer. It appears on newsstands Oct. 28, with a \$1 cover price (it goes up to \$1.99 with the second issue). Rate base is 250,000. —Kristina Feliciano



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Travel books climbing back from 9/11; skateboarders and gamers get the inside story; coming soon to the newsstand; and fun facts about magazines.

6 NOT FADE AWAY

Rolling Stone, *Playboy*, *Reader's Digest* and *TV Guide* are remaking themselves for a new generation of readers.

BY LISA GRANATSTEIN

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Which magazines will benefit in the current advertising climate? Which ones will founder? An analysis.

BY TONY CASE

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Successful covers.

BY AIMEE DEEKEN

Cover Photography by Michael Lewis

ROCKY ROAD

Travel magazines still finding footing after 9/11

It's unusual to hear a publisher describe a drop in ad pages as "phenomenal," but that's what *Condé Nast Traveler* publisher Lisa Hughes calls her magazine's year-to-date performance through November. "We're only down about 2 percent this year, which is phenomenal," she says. "It's a challenging time."

It sure is. Even before 9/11, the economy was heading south, but after the World Trade Center attacks, magazine advertising slowed to a near standstill, especially in the travel category. "When you shut down the nation's airports and airlines cut back on their flights, clearly travel as an industry was hit hard," Hughes says. (In 2002 the magazine has reaped fewer than half the 75 airline pages it had last year.) Even though travel accounts for about 50 percent of the ads in *Traveler* (which has a circulation of 750,000), as it does for the other leader in the category, American Express' *Travel + Leisure* (950,000 rate base), during the first half of 2002 both titles were reeling.

As 2002 comes to a close, publishers are cautiously optimistic. They've enjoyed an uptick from advertisers such as cruise lines (which have promoted themselves as safer in the post-9/11 world) and automotive (more people are doing driving trips) and aggressively marketed ancillary programs to help them achieve relative stability.

Traveler, for instance, with its 15th-anniversary issue, enjoyed its best November ever, up 34 pages from last year's. It has been up in ad pages every month since June. While *T+L* has had tougher times—July was up, October was flat, and November looks to be up from 2001—"I've already made budget," says Asmodeo, "and it hasn't been easy, because budgets were set before 9/11, and I am trying to stick to my rates."

Both publishers talk about the importance of "accountability"—being able to prove to advertisers that their dollars are hard at work. *T+L* did a program with Perry Ellis with an insert, in-store events and a customized gift; *Traveler* just launched a branded series on PBS called "Insider's Guide."

Hughes says she's planning on "modest increases" for 2003, but as Asmodeo puts it, "If Iraq happens, we're going to see some consolidation and fallout."—David Handelman



Double-take



Fall's crop of magazines brought some surprises to the newsstand. The Rolling Stones on *Fortune*? Yoga moves (in couture, no less) on *Vogue*? From Jennifer Love Hewitt's *Maximesque* pose for *Rolling Stone* to *Golf for Women*'s selling sex, it's hard to tell a magazine without a logo. It's been a tough year in the magazine business, and in the never-ending quest to sell magazines, shaking up the formula couldn't hurt. For more on what's shaking—and selling—at the newsstand, see "The Last Word," on page 38.

the facts

20

■ The number of times Mick Jagger has appeared on the cover of *Rolling Stone*

47

■ The number of times Jack Nicklaus has appeared on the cover of *Golf Digest*

51

■ The number of times Michael Jordan has appeared on the cover of *Sports Illustrated*

52

■ The number of times Princess Diana has appeared on the cover of *People*

58

■ The number of times Richard Nixon has appeared on the cover of *Time*

Feb. 1741

■ The first missed deadline occurred when *The American Magazine* published, with a January cover date.

13,541

■ Number of magazines in 1988

17,694

■ Number of magazines in 2001

35

■ Number of business and finance magazines launched in 1998

6

■ Number of business and finance magazines launched in 2001

16,613

■ Number of editorial pages devoted to entertainment and celebrities in 2001

456

■ Number of editorial pages devoted to fiction in 2001



Photograph by Alan Richardson

"COUNTRY LIVING
 inspires me because
 everything in the magazine
 is attainable. If it's a recipe
 for corn chowder, they
 don't tell me to start by
 growing my own corn.
INSPIRATION THAT'S
ATTAINABLE is why
 I always come home
 to the comfort of
COUNTRY LIVING."

ABBY GREENSPUN, 34, mother, registered dietitian, runner

25 YEARS OF COUNTRY LIVING
 Join our yearlong celebration in 2003 and don't miss our exciting new anniversary marketing programs.

For more information on why 66% of American women live the casual, comfortable lifestyle, as reported by the Country Living/Yankelovich study *America's Pursuit of Comfort*, contact Steven Grune, publisher, at 212-649-3190.



Come home to comfort SM



Not fade away

Rolling Stone, Playboy, TV Guide and Reader's Digest defined their times. Now editors and publishers are trying to redefine them for a new generation of readers. BY LISA GRANATSTEIN

KICK START: *Rolling Stone* founder and editor in chief Jann Wenner (left) and recently named editor Ed Needham are reshaping the magazine. PHOTOGRAPH BY MICHAEL LEWIS



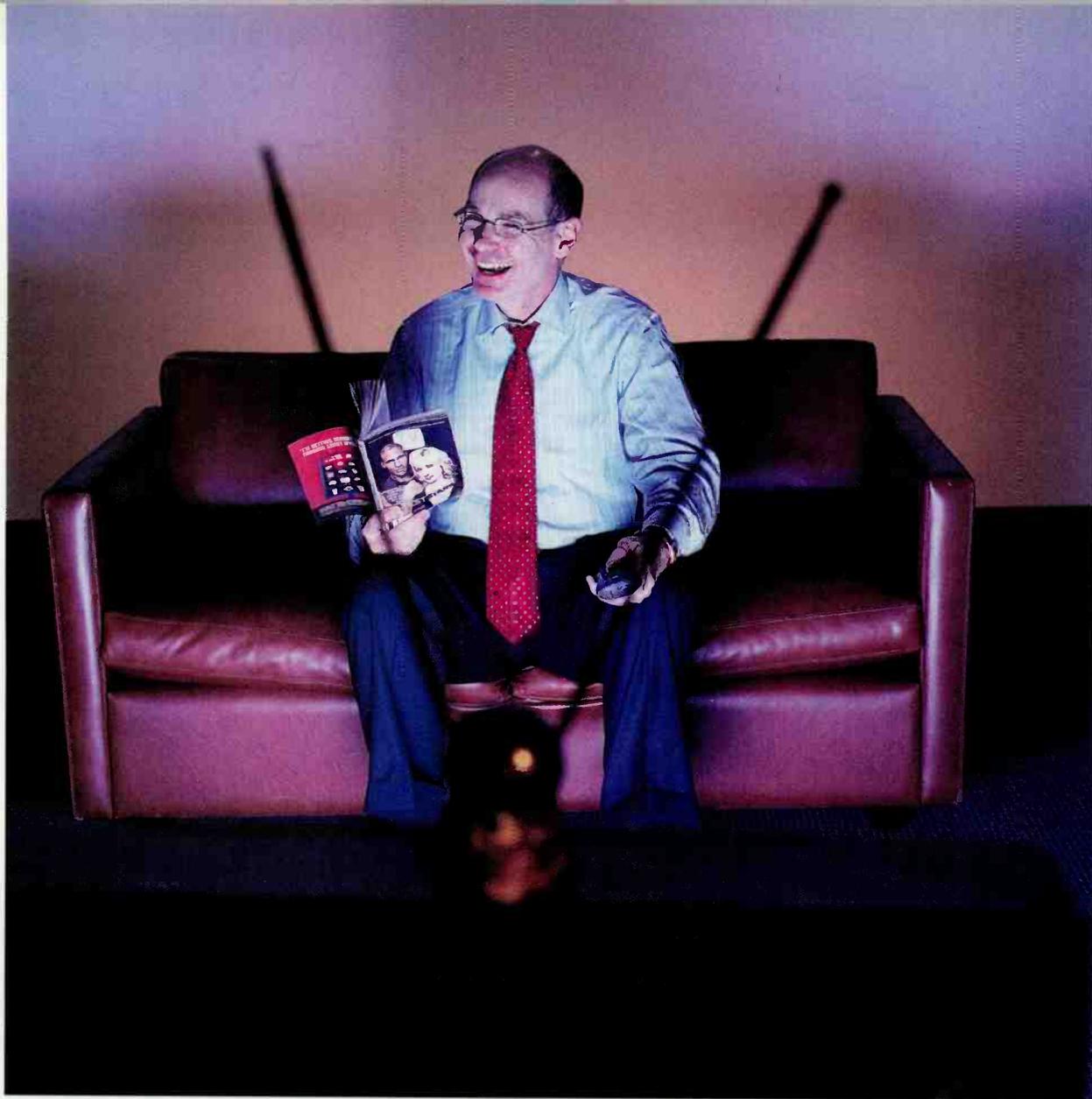
coverStory

Leaning back in his chair, and looking like a man who's heard it all before, Jann Wenner ticks off the grief he's gotten for tinkering with 35-year old *Rolling Stone*. "I got flack after issue five for putting color in the logo. I got flack when it became four color, and I got flack when I put a fucking staple in the magazine," recalls a mildly amused Wenner, the pop-culture bible's editor in chief. "People are change adverse. If you ask them, they want to leave it comfortably the way it is. But some of us, like myself, like change."

Controlled chaos may be more like it. This year, Wenner, whose company Wenner Media also publishes *Us Weekly* and *Men's Journal*, replaced all three of his top editors, and all three titles are currently undergoing transformations. But it was his decision this summer to lift a page from the trendy laddie books—those young men's magazines with babealicious covers—that touched off the latest round of rebuke. To some, it appeared as though he had abandoned *Rolling Stone's* storied past in favor of some vapid future. To Wenner, sharper, shorter, more timely pieces, with a renewed emphasis on music, was the smart way to go.

"We're responding to an overall change in the media landscape, and an overall change in the way people use and consume media," explains Wenner. "*Rolling Stone* was getting kind of sleepy. We needed to kick it in the ass, if you want the shorthand."

Wenner has given *Rolling Stone* a swift kick when the times called for it. A stroll through his offices is a history lesson in publishing. Magazine covers, stacked seven high



IN CONTROL: *TV Guide* publishing president John Loughlin is looking to adjust the focus of his magazine. PHOTOGRAPH BY TODD FRANCE

and snaking down a long hallway, let visitors trace how *Rolling Stone* evolved organically with the times it chronicled—from its start in November 1967 as a quarterfold on newsprint, to its color tabloid format in 1974, to its a new logo in 1978.

“That’s part of [Wenner’s] genius,” says Danny Goldberg, a former *Rolling Stone* contributor and chairman/ceo of Artemis Records. “He’s restless; he cares. He keeps focusing on updating it and changing it. He’s changed it dozens of times, and that’s why it still matters.”

Few magazines have managed to retain their currency for decades, and certainly not without the growing pains experienced by *Rolling Stone*. “We expect magazines to live forever, and maybe that’s an unrealistic expectation,” says Rick Jones, now managing partner of the Douglas/Jones Group, a marketing services firm. “But to sustain a brand, the critical question to ask is, how do you know when you really need to be thinking

about reinventing yourself before it’s too late? It’s very challenging. You can’t presume that a household name can have relevancy with the next generation of customers. To do so is publishing hubris.”

The battle for relevancy continues today for several other iconic magazines. Like *Rolling Stone*, 48-year-old *Playboy* must contend with stiff competition from laddie titles *FHM*, published by Emap, and Dennis Publishing’s *Maxim*, as well as an array of other media choices that compete for its readers’ attention. Meanwhile, 49-year-old *TV Guide* and 80-year-old *Reader’s Digest* must deal with readers’ changing tastes and the vastly different media landscape that’s grown up around them. But rather than clinging to the past, these venerable magazines are taking bold steps. All have sought out agents of change to keep their brands on course for the 21st century.

In the case of *Rolling Stone*, Wenner knew it was time for a shake-up at his 1.3 million-circ biweekly. Though the

magazine's brand is internationally renowned, the U.S. flagship needed an energy boost. Much of what had distinguished it over time had been embraced by others, including cable channel MTV, Time Inc.'s *Entertainment Weekly*, and music magazines *Spin* and Dennis' *Blender*. Making matters worse, readers were being siphoned off by the British laddie imports. Newsstand sales slipped 16 percent in the year's first half over the year prior, according to the Audit Bureau of Circulations (through the Oct. 17 issue, ad pages were flat at 1,122, reports the *Mediaweek* Monitor). And to the chagrin of Wenner, for the first time in a long time, the acclaimed title had not been nominated for a National Magazine Award.

The changes to the edit team were largely serendipitous, spurred by the departure of longtime art director Fred Woodward. Wenner first brought in Andy Cowles, a veteran of *Q*, Emap's esteemed British music title, and then moved on to replace Robert Love, who had been with the magazine 20 years, the last five as its managing editor. But it was Wenner's decision to hire Ed Needham, editor of *FHM*, that concerned some boomer-age media watchers, who feared *RS'* tradition of long-form investigations and breathy national affairs pieces would be tossed aside in favor of lowbrow, frat-boy humor. "I was surprised by the degree of comment it provoked," says Needham, who has repeatedly assured all he would not abandon *RS'* journalistic endeavors. "But it was only because the magazine is held in extraordinary regard by this country."

Just over a month into the redesign, the beginnings of a metamorphosis are already apparent: a brighter, more energized look, complemented by shorter and more varied pieces in the front of the book, and loads more music reviews in the back. Needham says he is just getting started; it will be a gradual process. The goal over the next year is for *Rolling Stone* to "find a unifying tone, or voice, or personality that the readers really identify with."

Playboy, too, is now grappling with issues of tonality. While other parts of the media empire, which consists of cable, video and Web offerings (and 19 licensed global editions), remain hot, the flagship magazine in recent years has been losing steam. Though paid circulation through June grew 2.1 percent to 3.2 million (it peaked in 1972 with a 7.16 million circ), newsstand sales fell 25.8 percent. (Still, its circ remains higher than *Maxim's* 2.5 million.) Ads, too, have declined; *Playboy's* pages through November fell 19.1 percent to 463. Ironically, the flagship magazine has been overshadowed by the very magazines it helped spawn.

Some would argue the *Playboy* philosophy has been played out. "Society has sort of moved on. Sexual freedom, free speech—all of these things are now very much enshrined," says Mark Edmiston, managing partner of investment banking firm AdMedia Partners. "It's really not just revitalizing it, it's kind of a redefinition. There's a time when you should take advantage of the change and change with the times. Hugh Hefner never did."

"I can't think of a magazine that's had a long success-

ful run that has done it by remaining unchanged over the decades," responds Christie Hefner, Playboy Enterprises chairman/ceo. "And in *Playboy's* case, the fact that in all that time there hasn't been a more successful monthly magazine launched in the U.S. or in the world suggests that there is a cultural sensibility about how to keep the magazine current and contemporary."

Playboy is now poised to go through some editorial changes. Earlier this month, *Maxim* executive editor James Kaminsky joined as editorial director, succeeding Arthur Kretchmer, who will soon retire after 30 years at the helm. "With Jim here we will be reexamining all the basic assumptions in terms of the magazine," says Hugh Hefner, or Hef, as *Playboy's* 76-year-old editor in chief is best known. But "what we're talking about is fine-tuning more than anything else. In other words, we're not plan-



FULL ACCESS: *Playboy* editor James Kaminsky will change the structure, but not the basic nature, of the book. PHOTOGRAPH BY DARRYL ESTRINE



teen

A fashion magazine cover featuring two models. The model on the left is wearing a light pink short-sleeved button-down shirt, knotted at the waist, and light-colored pants with a wide, decorative belt. She has a small necklace and a black wristband. The model on the right is wearing a pink ruffled crop top, a brown denim jacket, and a long, flowing yellow skirt. She is accessorized with multiple necklaces, including a long pearl necklace and a necklace with a rectangular pendant. The word "VOGUE" is printed in large, white, serif capital letters across the center of the image.

VOGUE

**THE FASHION
& BEAUTY
AUTHORITY.**



READY FOR A CHANGE: *Reader's Digest* editor in chief Jacqueline Leo has added original stories and editorial talent to the 80-year-old title's mix. PHOTOGRAPH BY GAIL ALBERT HALABAN

ning on changing the basic nature of the magazine. What we really need to do is recapture Madison Avenue's attention and reestablish the dominance that I think is always there in terms of circulation."

Kaminsky, like Hef, ardently believes the brand is as relevant today as it always has been. "This is truly a magazine of the moment, it always was," says Kaminsky. "I want to carry that tradition forward, and by the very nature of what defines this magazine, that does mean change." Along with adding more narrative stories and humor, and using less-explicit nude pictorials (which will surely help with advertising), the biggest changes will be structural. "My religion is access points," explains Kaminsky. "I think this magazine needs more of them, something to grab the reader on every page."

One critical development for *Playboy* will be that for the first time, the editorial director (and in time the majority of the edit team) will be based in New York, instead of Chicago. "Our presence in the media community is going to be enhanced," says Kaminsky. "It's going to give us a dose of caffeinated energy. I just think everything is going to work together in a slightly more integrated way."

That New York state of mind has been integral to *Reader's Digest's* "quiet revolution." Three years ago, Tom Ryder, ceo of Reader's Digest Association, the Pleasantville, N.Y.-based publisher and direct-response company, initiated a plan to jump-start the staid monthly, which had come to be most closely associated with doctors' offices, senior citizens and a fading sweepstakes business. Though *Reader's Digest* retained a loyal following and remains one of the largest U.S. publications (and publishes 48 international editions), the flagship's circulation has fallen in recent years. From July 2002 to January 2003, Ryder will have cut the monthly's circ over the past 12 months by 12 percent, to

11 million in January 2003 (at its peak in 1974, *RD* boasted a circ of 18.6 million). Meanwhile, its ad pages through November fell 6.1 percent to 928. "It was once said by a senior *Digest* officer 'it's hip to be square,' but that doesn't seem enough to keep the rate base up," says Douglas/Jones Group's Jones, an *RD* veteran. "They still need to contemporize the brand and recognize we are in more of a pop culture era. There are so many media choices out there that you can't afford this kind of imagery."

Ryder is well aware of the pressing need for a tune-up. "We failed to make necessary changes in the editorial product," he says. "It's understandable when you're selling the number of magazines that we were selling. You don't want to mess with success. At the same time, probably the best time to fix something is when it ain't broke."

In making *Reader's Digest* more modern and appealing, Ryder, like Wenner, has had to do so without scaring off the magazine's loyal readers. First Ryder brought in Eric Schrier, the former president/ceo of Time Inc.'s *Health*,

to be the company's editor in chief. Schrier got the ball rolling, adding new columns and minor design tweaks. Then, a year ago, Ryder hired Jacqueline Leo, a veteran of Meredith Corp., *Consumer Reports*, and the New York Times Co. (where she founded *Child* magazine), to finish what he had started. But before committing to the endeavor, Leo, now *RD's* editor in chief, wanted to know how far RDA was willing to go. "The biggest thing to me was, 'Are you really ready for change?'" Leo recalls asking company execs. "And the answer was, 'Absolutely.'" The redesign, culminating in the October issue, includes glossier paper, new body type, and more color and illustrations.

While *Reader's Digest* continues to be a blend of stories culled from other magazines and original material, Leo is seeking out fresh stories from a new 32-city network, as well as new contributors. Thanks to her expansive Rolodex, she has not only hired editorial talent from *Health* and *The New York Times*, but also snagged former *Money* managing editor Frank Lalli, now vp of development for the company. This summer she tapped Tucker Carlson, CNN *Crossfire* co-host, as a columnist and got NBC anchor Tom Brokaw to pen a piece for July's "Our America" package. Adding to *RD's* stable of contributors and creating buzz has everything to do with having a New York City presence; her predecessors had more of a Washington mindset. "It's about being out there and part of the conversation," she says. "*Reader's Digest* is getting noisier."

So is *Reader's Digest* now cool? "I think *Reader's Digest* is extremely cool," says Ryder, though he acknowledges the magazine has a ways to go in convincing others. "We thought a lot and argued about the issue of perception, and our conclusion was that you start trying to change perception once you've changed the facts. Now we're ready to start working on perception because the

Karen Balik
Advertising Executive/Mother of Two
2002 Media "Bio of the Year" Winner
NY Hospital of Queens Fund-Raiser
Biography Reader

"Success is not
the key to happiness.
Happiness is the key
to success."

- Herman Cain

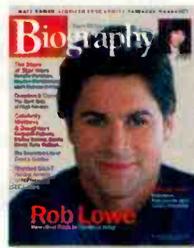
Biography's 4.1 million readers are active, well-rounded and passionate about getting the most out of their lives. They come to Biography for a monthly jolt of ideas and motivation that one can only get from other's inspired lives. For more information, call Tom McCluskey, VP/Publisher at 212.210.9053.

*Source: Spring 2002 MRI.

Biography

MAGAZINE

QUALITY OF LIVES





TEAMWORK: *Rolling Stone's* creative team, including art director Andy Cowles (left) and photo editor Jodi Peckman (right) are helping Needham to shape the magazine. PHOTOGRAPH BY MICHAEL LEWIS

coverStory

magazine is different and it is where we want it to be."

While *Rolling Stone*, *Playboy* and *Reader's Digest* must all add some polish to their brands, *TV Guide*, published by Gemstar-TV Guide International, faces a much more daunting task. *TV Guide*, a blend of TV programming listings and entertainment news, must find a way to reinvent itself. An explosion of channels offered by cable and satellite distributors has made it increasingly difficult for the weekly guide to keep up. Moreover, consumers are looking elsewhere for their TV news and listings, including local newspapers, the Web, and magazines such as *Entertainment Weekly*. While it is still one of the largest U.S. magazines, *TV Guide's* circulation has dropped 30 percent over the past five years, to 9 million.

"The brand is still powerful, but the magazine product is becoming less so every day," says Charlie Rutman, Carat USA president. "They are a product of a changing environment. They served a very specific need, did it well for a long time, and the need has changed. They have a product problem more than a brand problem."

Not helping matters has been Gemstar's recent strate-

gy of making *TV Guide's* electronic spin-offs—*TV Guide Channel* and the interactive program guides—its priority, effectively turning the print version into a second-class citizen. The magazine has been without a publisher for a year. (Ad pages through the Oct. 12 issue have sunk 15.4 percent to 1,844.) Much of that strategy came after Gemstar acquired a controlling stake in *TV Guide* from Rupert Murdoch's News Corp. But now, as Murdoch's team assumes more control, the print edition is getting the attention it badly needs. Two weeks ago, Gemstar's chairman/ceo, and cfo resigned, and Jeff Shell, a former News Corp. exec and most recently Gemstar's co-president/coo, was promoted to the company's ceo. Just last month, Shell had named publishing veteran John Loughlin president of its *TV Guide Publishing Group*, a newly created position. "It probably has an opportunity to enhance its relevance," admits Loughlin, most recently president/ceo of Primedia's Consumer Media and Magazine Group. "I think we've got an opportunity to do a better job."

In order to better serve (and preserve) readers, *TV Guide* in coming months will begin to complement its listings with more recommendations; a major consumer research study is currently under way to help *TV Guide* editor in chief Steve Reddcliffe and his team of editors determine the best

balance. "I'm certainly willing to say that over time, guidance will play a larger role proportionately [than listings]," says Loughlin. "Particularly for those people confronted with hundreds of viewing choices in a given day, this magazine has the credibility and trust to make those kinds of recommendations." Moreover, on the advertising front, Loughlin says he will hire a new publisher. "The brand has been under marketed from a magazine standpoint, and that is absolutely one of the things we're going to fix."

Clearly, to have survived this long, *TV Guide* and its iconic brethren know what it means to embrace change, without losing their essence.

Back at *Rolling Stone*, Wenner sums it up nicely: "Am I changing the historical nature of *Rolling Stone*? Are the earthshaking tectonic plates of culture shifting? No," he says. "And I'll punch anybody out who thinks we're abandoning our principles. 'Cause we're not." ■

To view the full text of Lisa Granatstein's interviews with Jann Wenner and Hugh Hefner, visit [Mediaweek.com](http://mediaweek.com).

The mini-market.
A microwave burrito
and a new state map.

Drive the 5-speed Golf. Drivers wanted. 



This campaign came out in April.
And people began to notice.
They noticed the purple sky.
Wide open spaces.
They spotted the little red, rarin' to go Golf.
They realized Volkswagen wanted drivers.
And they wanted freedom.

By August, Golf sales were up 41%.

Drivers wanted. 

Bottom line, magazines make a difference.



Magazine Publishers of America

To see more successful magazine case histories, visit www.magazine.org.
The Volkswagen ad ran as part of an overall media mix.

Looking ahead is much more difficult than looking back.

In the spring, we try to make sense of the year that just passed, to determine which magazines have grown, and which will continue to thrive. Now, with our annual Fall Magazine Report, we are going out on a limb and looking ahead, attempting to predict which magazines will lead, and which will fall behind, in ad sales.

This is not a list of hot magazines. Instead, we have analyzed the 12 ad categories tracked by Publishers Information Bureau. Then, using numbers from Competitive Media Reporting, we looked at the top spenders in each ad category for the years 1997, the peak year of 2000, the rock-bottom year of 2001, and the current year through September. Next, we calculated the top 30 titles, by dollars, in each magazine category, using the Mediaweek Monitor as our guide, in order to determine which types of magazines are grabbing the greatest share of ad dollars. Finally, we report the top 10 magazines, according to revenue, and rank the leaders and laggards across each ad category. We passed this comprehensive chart along to leading media executives and analysts, who took time to pore over the numbers and help us to unearth trends. What we've come up with is an indicator of what the next year may hold for some of the biggest magazines.

Comments from these media executives regarding specific titles and categories can be found on the following 12 pages, but they also had some general observations on ad spending, including this from Mike McHale, group media director of Optimedia International: "If you look at the more rational year of 1997, versus 2000 when Wall Street was funding the budgets of Madison Avenue, what you see is positive, normal growth." While some categories might be struggling, overall, these numbers indicate that magazines are holding their own in an unpredictable economy.

Mediaweek contributing editor Tony Case was the lead writer and researcher on this project; he had invaluable help from *Adweek's* research editor Jim English. Art director Paul Virga structured a readable layout. And copy editor Mary Callahan provided a fresh pair of eyes when ours were aching from looking at so many numbers. —*Patricia Orsini*

Adweek Hot List Review

In the past, we have done our Hot List in March, then never looked back. But this year, we thought we'd do a midseason review, and look at how our picks from last spring are faring, based on ad sales so far this year.

Our top pick, *Maxim*, shows up as a leader in apparel, a category the book has aggressively pursued. Perennial Hot List-er *In Style*, from Time Inc., leads a host of categories, including toiletries/cosmetics and retail. *YM* is one of the leaders in the toiletries category, hanging in there in a tough year. Hearst's *Good Housekeeping*, which muscled onto the list, benefits from spending in the food category. Another perennial, *Martha Stewart Living*, is holding its own in household furnishings and food products, while slipping in retail. Another list mainstay, *Vanity Fair*, seems to be slipping in apparel.

While some Hot Listers—*Teen People*, *ESPN*, *Cooking Light* and *Marie Claire*—don't show up at all, others, such as *Time*, *Sports Illustrated* and *Better Homes and Gardens* show up several times. Keep in mind that we are looking at market share, while the Hot List looks at revenue growth. Still, this gives us an idea of titles we may be looking at next spring.—*PO*

Where the action is

Tracking ad spending in the top 12 advertising categories. BY TONY CASE

Apparel & Accessories Ad Spending

SPENDERS											
1997			2000			2001			Y-T-D‡		
Ad Spending \$987.6 million			Ad Spending \$1.36 billion			Ad Spending \$1.37 billion			Ad Spending \$836.1 million		
RANK #5		RANK #5		RANK #4		RANK #6					
DOLLARS*	NO. OF PAGES	DOLLARS	NO. OF PAGES	DOLLARS	NO. OF PAGES	DOLLARS	NO. OF PAGES	DOLLARS	NO. OF PAGES	DOLLARS	NO. OF PAGES
Nike	43.8	705.3	Nike	56.0	819.4	Nike	59.8	752.3	Nike	49.3	588.6
Polo/RL	39.1	627.6	Levi Strauss	40.5	621.8	Sara Lee	39.3	410.1	Gap	24.0	340.0
Vanity Fair Corp.	34.9	463.3	LVMH	33.2	559.9	Gap	35.3	562.6	Sara Lee	23.5	217.5
LVMH	28.0	577.2	Skechers	31.0	469.8	DeBeers	33.5	416.1	LVMH	22.1	324.0
Tommy Hilfiger	24.3	417.9	Polo/RL	30.4	457.4	LVMH	32.7	500	Levi Strauss	19.4	208.0
Sara Lee	22.3	323.9	Gap	28.2	486.4	Skechers	31.9	433.7	DeBeers	19.2	236.5
Liz Claiborne	22.2	363.3	Reebok	27.7	408.7	Levi Strauss	31.8	421.2	Skechers	18.5	225.6
Movado	20.0	379.9	Tommy Hilfiger	27.7	429.2	Tommy Hilfiger	29.3	384.6	Vanity Fair Corp.	18.1	169.2
Reebok	18.8	332.5	DeBeers	26.7	386.9	Polo/RL	29.0	380.5	Guess	18.0	255.1
DeBeers	17.3	251.7	Sara Lee	26.1	323.6	Vanity Fair Corp.	26.6	271.9	Tommy Hilfiger	17.8	230.2

Top-dog Nike maintains steady uptick in magazine spending, while Polo/Ralph Lauren falls out of the top rankings.

MAGAZINE CATEGORIES											
Fashion/Beauty	232.0	4655.5	Fashion/Beauty	344.4	5508.1	Fashion/Beauty	371.3	5323.1	Fashion/Beauty	230.4	3151.9
Sports/Ent/Leis	109.2	708.1	Bimonthly*	149.5	5133.4	Bimonthly*	135.7	2154.4	Bimonthly*	79.0	2463.9
Bimonthly*	92.3	3902.0	Men's Lifestyle	112.7	1770.2	Men's Lifestyle	111.1	1485.6	Men's Lifestyle	72.3	956.5
Men's Lifestyle	74.5	1772.7	Sports/Ent/Leis	87.8	431.9	Sports/Ent/Leis	65.2	300.9	Sports/Ent/Leis	40.0	190.7
General Interest	37.3	709.0	Bus/Ent Blwly	44.0	519.2	General Interest	45.4	646.7	Teen	34.4	391.8

Men's lifestyle books like *Maxim* forge ahead.

MAGAZINES											
Sports Illustrated	62.5	320.6	Bride's	84.6	2938.1	In Style	79.4	991.8	In Style	55.8	673.2
Vogue	55.0	1051.4	Vogue	68.8	1154.9	Bride's	77.9	2465	Bride's	47.7	1470.0
Bride's	54.0	2142.1	In Style	65.2	904.7	Vogue	71.3	1154.5	Vogue	41.4	687.7
Modern Bride	38.3	1759.9	Sports Illustrated	57.8	256.4	Modern Bride	57.8	1889.1	Modern Bride	31.3	993.9
Vanity Fair	37.3	709.0	Modern Bride	52.7	1902.9	W	52.8	859.1	Sports Illustrated	29.7	113.3
Elle	36.5	817.0	Elle	41.0	892.7	Elle	47.7	790.7	Harper's Bazaar	28.2	411.4
W	35.2	850.0	W	48.9	926.9	Vanity Fair	45.4	646.7	W	27.9	456.0
GQ	34.2	848.2	Vanity Fair	45.8	715.8	Harper's Bazaar	41.0	635	Elle	27.4	414.3
NY Times Mag	33.3	577.3	GQ	38.8	769.2	Sports Illustrated	41.0	170	Maxim	27.0	198.3
People	33.1	221.2	Harper's Bazaar	37.4	670.3	Town & Country	35.1	658.6	Vanity Fair	21.5	322.0

Teen titles like *YM*, *Seventeen* and *Teen People* emerge as one of top takers of apparel dollars.

Nike, Nautica and Guess help drive *Maxim* into the top rankings.

THE FUTURE

LEADERS

In Style

► The Time Inc. women's lifestyle book remains the leader in apparel, thanks to big commitments from Calvin Klein, Jones New York and Ellen Tracy, even though Condé Nast's *Bride's* is always threatening to steal its thunder.

Maxim

► Guess, Nautica, Polo/Ralph Lauren and Tommy Hilfiger helped push the Dennis Publishing title into the top 10 and continue the momentum of the

men's lifestyle magazine category. Fallon's Carol Pais is struck by the continued upward trajectory of "laddie books," noting that *Maxim's* fortunes are rising, while Condé Nast's *GQ* has fallen out of the top 10. "*Maxim* speaks to men in that 'man-to-man' peer-level voice, just as the women's titles have done to women for years—not dictatorial, but more co-conspiratorial. And clearly it's highly successful," she says. Steve Moynihan of Arnold MPG points out that *Maxim*, along with *O* and *Rosie*, is one of the few new-genera-

tion titles to crack the top 10 in any of the major ad categories.

LAGGARDS

Vogue

► The Condé Nast fashion title clearly is struggling to keep up. As with retail, diminishing print budgets of luxury spenders like LVMH (encompassing brands such as Louis Vuitton, Fendi and Donna Karan) and DeBeers are hurting fashion books.

Elle

► Like *Vogue*, depends on high-end apparel dollars. Eric Blank-

fein of Horizon Media isn't surprised to see fashion books dragged down; he predicts sluggish results into at least the first half of next year. *Elle* tumbles from No. 6 to 8.

Vanity Fair

► Condé Nast's general interest giant, another big beneficiary of luxury dollars, has suffered a bruising decline in apparel income, sliding all the way to the bottom of the top 10. Big clients like Polo/Ralph Lauren have dramatically slashed their magazine commitments.

Automotive Ad Spending

SPENDERS

1997	RANK #1	2000	RANK #1	2001	RANK #1	Y-T-D†	RANK #2				
Ad Spending \$1.84 billion		Ad Spending \$1.79 billion		Ad Spending \$1.72 billion		Ad Spending \$1.18 billion					
	DOLLARS*	NO. OF PAGES		DOLLARS	NO. OF PAGES		DOLLARS	NO. OF PAGES			
General Motors	596.4	7138.2	General Motors	447.2	5233.9	General Motors	370.2	3757.1	General Motors	220.9	2204.2
Daimler Chrys	386.5	5473.2	Daimler Chrys	326.0	4235.3	Ford	302.6	3602.7	Ford	170.8	1888.8
Ford	316.8	4578.4	Ford	252.0	3366.7	Daimler Chrys	266.6	3243.7	Toyota	170.2	1666.0
Toyota	152.8	1821.4	Toyota	197.2	2210.2	Toyota	201.4	2194.4	Daimler Chrys	158.8	1890.7
Honda	68.0	977.1	Nissan	115.8	1631.5	Honda	129.2	1547.5	Nissan	115.9	1410.4
Nissan	58.3	867.8	Honda	106.3	1371.5	Nissan	121.4	1564.5	Honda	102.0	1166.9
BMW	30.0	470.9	Volkswagen	52.4	756.3	Volkswagen	61.5	811.5	Volkswagen	34.4	428.3
Mitsubishi	27.4	350.7	Mazda	35.3	396.0	Hyundai	26.6	241.9	BMW	27.1	393.0
Mazda	20.2	302	BMW	28.0	488.0	BMW	24.2	359.2	Hyundai	17.9	168.2
VW	19.9	348.8	Isuzu	26.3	864.8	Kia	18.2	125.7	Kia	10.0	62.3

MAGAZINE CATEGORIES

News/Bus Wkly	335.5	2389.3	Sports/Ent/Leis	273.1	1715.5	Enthusiast	274.6	3086.6	Enthusiast	211.2	2323.4
Sports/Ent/Leis	317.7	2263.7	Enthusiast	270.5	3308.9	Sports/Ent/Leis	239.9	1402.3	Sports/Ent/Leis	154.9	854.3
Enthusiast	266.5	3713.7	News/Bus Wkly	239.6	1467.0	News/Bus Wkly	225.3	1279.6	News/Bus Wkly	134.5	749.6
General Interest	88.1	625.1	Bus/Ent Biwkly	89.0	1095.0	Bus/Ent Biwkly	102.8	1133.8	Bus/Ent Biwkly	77.4	790.9
Bus/Ent Biwkly	71.1	1097.4	General Interest	57.2	412.9	General Interest	61.1	413.3	General Interest	48.4	338.1

MAGAZINES

Sports Illustrated	149.4	836	Sports Illustrated	157.1	708.1	Sports Illustrated	139.3	582.5	Sports Illustrated	88.3	338.4
Time	135.5	739.7	Time	115.3	535.8	Time	110.8	487.6	Time	58.5	240.9
Newsweek	110.6	725.7	Car and Driver	72.9	629.8	Car and Driver	71.6	564.0	Car and Driver	53.4	390.5
People	97.0	685.7	People	70.8	418.0	People	57.8	310.0	Motor Trend	41.8	335.7
Car and Driver	72.9	839	Newsweek	58.5	325.1	Newsweek	57.6	311.0	Newsweek	35.4	170.3
U.S. News & WR	54.0	486.4	Motor Trend	49.6	502.9	Motor Trend	51.4	470.4	People	35.0	176.1
Road & Track	48.6	838.5	Road & Track	45.0	629.2	Road & Track	42.2	541.9	Road & Track	31.9	388.6
Motor Trend	46.8	664.2	Automobile	39.8	596.2	Money	35.4	252.8	Automobile	28.0	370.8
Reader's Digest	37.2	185.4	Forbes	34.5	448.8	Automobile	33.6	467.0	BusinessWeek	26.2	235.8
Automobile	37.0	657.5	Fortune	34.2	433.0	BusinessWeek	32.2	298.3	BH & G	20.9	66.0

* In millions. Source: Competitive Media Reporting. † Year-to-date spending is through September 2002.

THE FUTURE

LEADERS

Sports Illustrated

► Still by far the first-stop shop for automakers, even though business across the category has slipped. Not a surprise considering the many 0 percent financing promos. "Deals mean retail media, radio, TV and newspapers, not magazines. Automotive is up as a category, but magazines are getting less of a share," explains Alan Jurmain of Lowe Lintas & Partners.

BusinessWeek

► BW bucks a trend that has

auto advertising fleeing weekly news and business titles, notes Andy Buchholtz of Veronis Suhler Stevenson. This as *Fortune* and *Forbes*, which graced the top 10 as recently as two years ago, have fallen out.

Better Homes and Gardens

► Meredith's *BH&G* cranks it up, the only women's service title to hit the top 10, thanks to big commitments from Toyota, Ford and Kia. "Women are the decision-makers for buying products, and they like to read mag-

azines, so that lines up nicely," says Cyndi April of OMD USA. Some think the women's books will continue grabbing a bigger share of auto ads. "Automakers better start looking at the fact that women buy cars," says PGR Media's Pattie Garrahy.

LAGGARDS

Time

► The leading newsmagazine gets hammered in this category, as automakers turn to enthusiast players like *Car and Driver* and *Automobile*. "There's been a real shift in automotive, toward

the core constituency," says Media Kitchen's Paul Woolmington. Mary Ann Foxley of Starcom isn't surprised enthusiast magazines are stealing the big boys' thunder. "When the economy suffers, you've got to go where the fish are biting."

U.S. News & World Report

► *Time* and *Newsweek*, while off substantially from last year, are at least still in the running. *USN&WR* appeared in the top 10 in 1997 but since 2000 has been MIA.

Japanese auto-makers' commitments to magazines are growing, while U.S./Europeans retreat.

After years of steady growth, enthusiast titles now firmly on top.

BusinessWeek on track to boost intake this year, while *Fortune* and *Forbes* are no more.



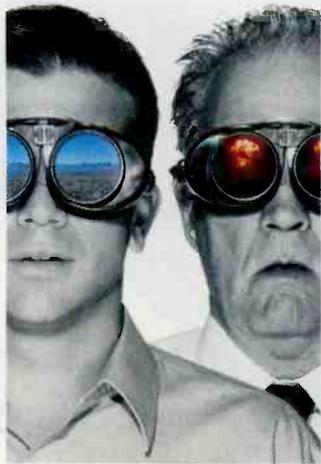
Sooner or later,
everyone gets it.

You may not get it, but 35 million people will – *AARP The Magazine*. Beginning with the March/April 2003 issue, *Modern Maturity* and *My Generation* will consolidate to become the largest-circulation magazine in the world. And with three demographic editions, *AARP The Magazine* will reach the most powerful market anywhere. That means people who spend more on products like cosmetics, cars, and clothing than anyone else. Call Shelagh Daly Miller, Advertising Director, at 212-850-8412 before your competition does. And let us offer you some frank advice.

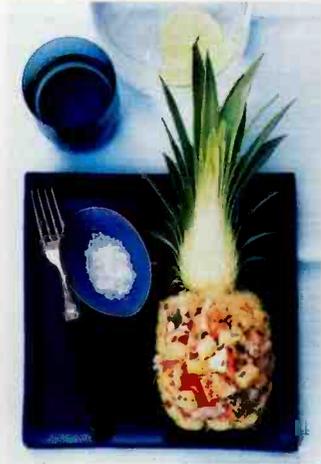
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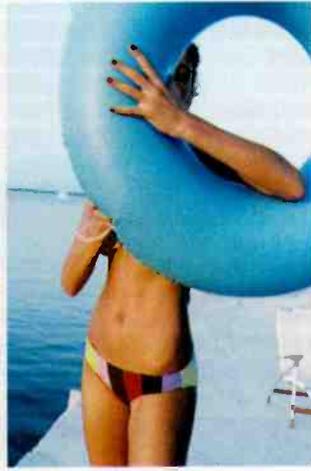
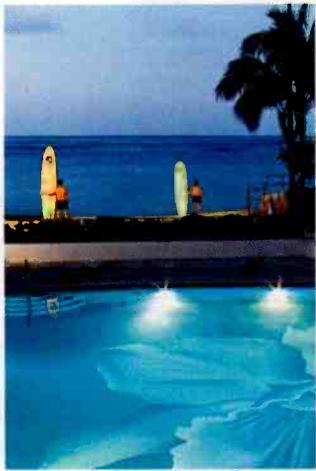
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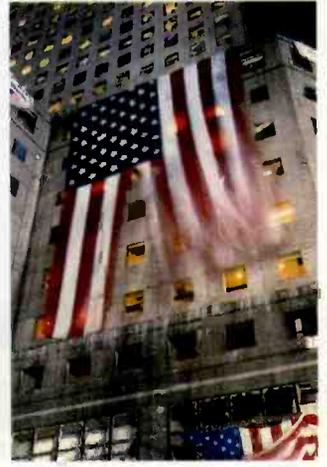
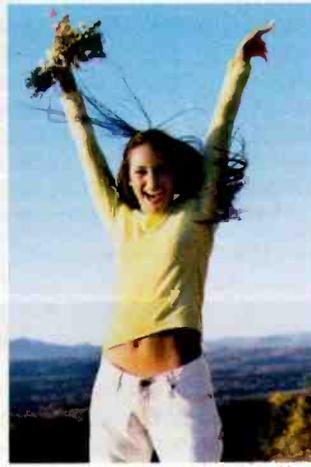
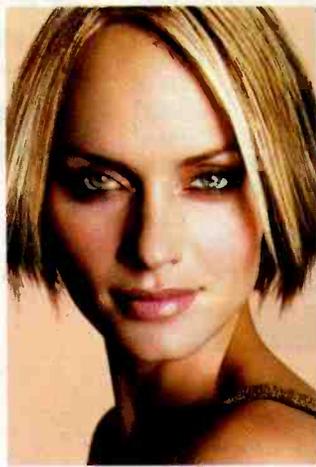
VOGUE ARCHITECTURAL DIGEST **GLAMOUR** BRIDES ModernBride **SELF** **GQ** VANITY FAIR *Gourmet* BON APPÉTIT *Traveler* allure HOUSE & GARDEN





WIRED Lucky. CONDÉNET *teem*MOGLE ^{THE}NEW YORKER

EVERYTHING YOU WANT TO KNOW



CONDÉ NAST
PUBLICATIONS

Direct Response Companies Ad Spending

SPENDERS											
1997		2000		2001		Y-T-D†					
RANK #2		RANK #4		RANK #3		RANK #3					
Ad Spending \$1.50 billion		Ad Spending \$1.40 billion		Ad Spending \$1.54 billion		Ad Spending \$1.14 billion					
DOLLARS* NO. OF PAGES		DOLLARS NO. OF PAGES		DOLLARS NO. OF PAGES		DOLLARS NO. OF PAGES					
Bradford Exchg	121.0	893.2	National Synd	124.5	149.2	National Synd	144.8	226	Bradford Exchg	124.7	847.9
Roll Intl	97.0	556.7	Bradford Exchg	106.4	842.7	Bradford Exchg	141.7	980.1	National Synd	100.8	161.4
National Synd	93.3	99.0	Dell	76.0	955.5	Dell	92.4	749.5	Dell	81	384.9
Bertelsmann	54.8	637.3	Bose	44.3	278.0	Bose	58.9	403.2	Comtrad	30.6	277.8
AOL/TW/Sony	54.5	618.2	Comtrad	42.0	577.7	Comtrad	37.8	435.8	Bose	29.8	244.5
AOL/TW	39.9	598.6	Bertelsmann	32.4	391.6	Roll Intl	31.2	264.4	Brown Forman	24.5	181.9
Micron Tech	37.8	996.7	AOL/TW	26.6	361.3	Brown Forman	30.0	201.8	Bertelsmann	23.9	207.0
Bose Corp	34.0	360.9	MBI Inc	26.5	264.8	Bertelsmann	28.2	256.4	AOL/TW	21.9	292.0
MBI Inc	30.1	320.4	Brown Forman	25.1	175.6	AOL/TW	27.0	369.3	Roll Intl	19.5	165.2
Gateway Inc	28.7	850.5	Roll Intl	24.8	222.3	AOL/TW/Sony	23.1	224.0	MBI Inc	16.6	180.7

MAGAZINE CATEGORIES											
Sunday Mags	356.1	873.6	Sunday Mags	320.5	717.3	Sunday Mags	393.0	763	Sunday Mags	296.8	544.6
Business/Tech	179.6	422.4	Women's Service	183.0	1277.5	Women's Service	181.6	1060.3	Women's Service	139.2	780.4
Women's Service	166.1	1340.2	Business/Tech	92.2	1431.5	Enthusiast	105.5	2547	Enthusiast	92.0	1701.2
Sports/Ent/Leis	135.3	898.4	Sports/Ent/Leis	86.3	545.2	Sports/Ent/Leis	84.0	530.1	Sports/Ent/Leis	50.3	326.4
Enthusiast	63.7	1965.3	Enthusiast	82.3	2254.8	Business/Tech	78.6	1078.5	Business/Tech	36.5	440.4

MAGAZINES											
Parade	217.7	275.9	Parade	191.7	211.7	Parade	228.6	247.7	Parade	167.6	184.5
USA Weekend	124	305.2	USA Weekend	111.3	213.0	USA Weekend	148.9	262.6	USA Weekend	118.0	191.1
PC Magazine	120.5	2280.4	PC Magazine	65.5	955.0	PC Magazine	63.7	845.2	BH&G	44.7	160.2
TV Guide	107.3	729.8	TV Guide	63.3	424.8	TV Guide	62.0	422	TV Guide	39.0	265.0
BH&G	41.4	229.0	BH&G	41.0	178.0	BH&G	54.0	219	PC Magazine	36.5	440.4
Woman's Day	36.2	346.3	Woman's Day	40.2	304.4	Woman's Day	40.5	279.6	Popular Photog	29.6	774.6
Smart Business	33.3	903.2	Popular Photog	36.0	1216.0	Popular Photog	37.0	1031.5	Woman's Day	27.8	193.4
Popular Photog	30.8	1227.6	Family Circle	29.7	217.7	Family Circle	33.9	227.8	American Profile	27.5	225.1
Family Circle	28.2	257.5	Good Housekpg	27.1	174.4	Good Housekpg	29.5	174.4	Family Circle	27.0	187.2
Windows	25.8	1042.0	Smart Business	26.7	476.5	Ladies Home Jrnl	23.7	159.5	Ladies Home Jrnl	19.9	121.7

* In thousands. Source: Competitive Media Reporting. † Year-to-date spending is through September 2002.

THE FUTURE

LEADERS

Better Homes and Gardens

► The Meredith stalwart is on track to best last year's intake, spurred by the continued growth of the direct response category overall. Big spenders like Bertelsmann and AOL/Time Warner have proved surprisingly resilient, considering book and music clubs are having a tough go at it. But those spenders have fallen way back over the last five years, notes Buchholtz of Veronis Suhler Stevenson. Buchholtz blames

the media recession "and these guys cutting back on their own spending." James DePonte of PriceWaterhouseCoopers says direct response has shown "surprising growth" considering how hard the business was hit after 9/11, and the troubles of subscription-bolstering sweepstakes and book and record clubs. "Business has bounced back to normal."

Family Circle

► Over the last five years, *Family Circle* has maintained its direct response intake, thanks in large

part to advertisers like Bradford Exchange (purveyors of porcelain ornaments and the like). Speaking about Dell, on track this year to boost its spending over last, Jurmain of Lowe Lintas & Partners notes more businesses are becoming direct-response driven: "In tougher times, you tend to shift away from brand-building toward that which is more measurable and that pushes product out the door." Maggie Connors of Foote, Cone Belding says the strength of direct response reflects the boom in home-shopping habits.

LAGGARDS

PC Magazine

► The tech title drops from 3 to 5 in this year's top 10, and its intake so far this year is a little more than half last year's total—no big revelation considering the misfortunes of financial and tech magazines, a category that has "fallen apart," as Buchholtz says.

TV Guide

► *TV Guide* looks not to be on track to meet last year's intake, and so far this year looks to meet just half 1997's levels.

Dell is one of the few big direct response spenders on track to boost its magazine commitments this year.

Enthusiast titles are expected to sustain their steady growth.

Women's service still fertile ground for direct response ads, evidenced by *Better Homes and Gardens'* strong showing.

DESPITE THE ECONOMY'S UPS & DOWNS B-to-B MEDIA DELIVERS

Some people may think this a perplexing time. A perplexing time to be advertising. A perplexing time to be selling.

While nobody knows with absolute certainty which direction the economy is heading, this important fact is undeniable: *Advertising in business-to-business media can significantly benefit businesses, especially during periods of economic uncertainty.*

Recent studies, including one by Yankelovich/Harris, have revealed such significant information as the following:

- Industry leaders rank B-to-B media — this includes magazines, web sites, and trade shows — top in importance for influencing purchase decisions. Way ahead of newspapers, television business networks, and even general business magazines*.
- Using B-to-B media in combination generates even more sales than using any one medium alone — a significant 56% more**.
- An overwhelming majority of American executives — 86% — agree that companies that advertise in an uncertain economy stay more top-of-mind when purchase decisions are being made, and create more positive impressions about their commitment to their products and services*.

For a free copy of the Yankelovich/Harris Report, or for valuable advice on how to put B-to-B media to work for your business, call Michelle Kahn at 212-661-6360. Or visit www.americanbusinessmedia.com.

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*Yankelovich/Harris **Fairfield Research

Drugs & Remedies Ad Spending

SPENDERS

1997			2000			2001			Y-T-D†		
RANK #7			RANK #9			RANK #6			RANK #4		
Ad Spending \$825.5 million			Ad Spending \$1.09 billion			Ad Spending \$1.13 billion			Ad Spending \$971.5 million		
	DOLLARS*	NO. OF PAGES		DOLLARS	NO. OF PAGES		DOLLARS	NO. OF PAGES		DOLLARS	NO. OF PAGES
Glaxo	151.2	1554.0	Pfizer	127.3	1292.1	Pfizer	132.2	1248.5	Glaxo	121.0	942.0
Pfizer	84.0	872.9	Glaxo	112.0	1041.6	Glaxo	129.9	1112.1	Pfizer	112.6	1005.5
J&J	70.5	902.2	J&J	111.0	1153.2	J&J	100.6	984.3	J&J	79.4	666.1
Bristol-Myers	65.4	747.6	Merck	102.0	1114.6	Merck	81.4	752.8	Merck	78.4	590.0
Merck	58.4	696.5	Wyeth	79.5	682.8	Bristol-Myers	80.1	626.0	Aventis	67.0	516.0
Wyeth	51.5	497.6	Bristol-Myers	72.6	565.8	P&G	60.1	337.6	Bristol-Myers	53.3	377.4
Astrazeneca	43.9	372.7	Schering-Plough	54.5	649.2	Pharmacia	55.6	434.3	Schering-Plough	46.2	406.7
Aventis	41.6	390.6	Astrazeneca	42.7	350.3	Aventis	49.0	390.3	Astrazeneca	39.3	246.5
Boehringer	28.2	253.4	Pharmacia	34.0	379.4	Wyeth	39.5	354.5	Royal Numico	28.0	297.0
Schering-Plough	26.6	290.2	P&G	31.2	210.8	Astrazeneca	38.6	256.3	Shire	27.7	163.2

MAGAZINE CATEGORIES

Women's Service	185.4	1294.2	Women's Service	254.7	1496.3	Women's Service	261.6	1416.8	Women's Service	214.4	1119.0
Sunday Mags	97.0	184.2	Sports/Ent/Leis	115.0	741.7	Sports/Ent/Leis	117.1	732	Health/Women	91.5	1130.2
News/Bus Wkly	95.9	734.8	General Interest	90.9	445.2	Sunday Mags	110.9	278.4	General Interest	85.6	378.5
General Interest	53.7	276.4	News/Bus Wkly	89.0	614.1	General Interest	93.7	438.4	Sports/Ent/Leis	85.4	489.9
Health/Women	37.9	706.4	Sunday Mags	76.1	126.1	Health/Women	76.1	994.3	Sunday Mags	65.2	103.5

MAGAZINES

Parade	64.7	99.2	Reader's Digest	79.9	374.3	Reader's Digest	80.1	352.2	Reader's Digest	76.6	313.5
Reader's Digest	53.7	276.4	BH&G	63.1	264.7	BH&G	67.6	258.6	BH&G	66.2	244.7
People	47.4	352.7	People	56.3	360.2	People	57.1	340.9	People	39.0	215.8
Time	43.6	278.0	Woman's Day	51.5	315.8	Parade	57.0	76.6	Prevention	38.1	407.6
BH&G	41.9	213.6	Parade	47.8	64.6	Woman's Day	50.0	283.2	Woman's Day	36.3	203.9
Newsweek	36.9	295.1	Good Housekpg	47.3	255.0	Good Housekpg	47.9	245.6	Good Housekpg	35.9	165.9
USA Weekend	32.3	85.0	Time	41.7	233.6	Family Circle	44.7	240.1	Parade	35.5	45.5
Family Circle	30.4	207.0	Prevention	40.3	513.4	Prevention	47	526.6	Ladies' Home Jrnl	34.7	214.2
Good Housekpg	30.2	187.1	TV Guide	36.5	268.2	USA Weekend	41.0	81.8	USA Weekend	29.7	58.0
Woman's Day	30.2	231.8	Ladies' Home Jrnl	34.7	240.2	TV Guide	40.2	297.4	Muscle & Fitness	28.6	771.6

*In millions. Source: Competitive Media Reporting. †Year-to-date spending is through September 2002.

THE FUTURE

LEADERS

Reader's Digest

► RD stays on top, but Meredith's BH&G is sneaking up. RD holds steady thanks to multi-page appeals by Bristol-Myers Squibb (Glucovance), Ortho Biotech (Procrit) and Glaxo-SmithKline (Avandia). Its fortunes, and those of the entire category, could be changing. "There's not a flood of new pharmaceuticals coming on the market. That would really change the way things have been going," says OMD USA's April. FDA approvals have also

slowed, putting a "damper" on the category, notes Buchholz of Veronis Suhler Stevenson.

Better Homes and Gardens

► The Meredith book actually grew its business last year, virtually a flat year versus 2000 for the category overall, and already so far this year is nearly even with 2001. Women's service titles in general are holding up. While BH&G is strong here, it fell behind in other key categories, including toiletries/cosmetics.

Prevention

► Wow! Moves up the ranks, from No. 8 to No. 4, driving overall positive trend for women's health titles, although actual dollars tracking to be only a bit better this year than last. Makers of diabetes drugs like Aventis (Lantus), Bristol-Myers Squibb (Glucovance) and Glaxo-SmithKline (Avandia) favor this pint-sized book. DePonte of PriceWaterhouseCoopers is "bullish" about the pharmaceutical category overall, due to "solid" demos of magazines getting the business.

LAGGARDS

People

► Although it weathered the 2001 slump, actually growing its business, nowadays the Time Inc. powerhouse is struggling to keep up. This, even as major pharma spenders like Merck (Singulair) and Schering (Clarinx) keep throwing in money.

TV Guide

► Gemstar-TV Guide International's title falls out of top 10 ranking altogether, although sports/entertainment/leisure weeklies overall hold steady.

GlaxoSmithKline leaps to the top, using magazines to push popular brands like Paxil, Flonase and Zantac.

Health titles such as Prevention are grabbing a bigger chunk of pharma ads.

RD easily stays at the head of the class, thanks to continued support by such spenders as Bristol-Myers Squibb and Glaxo.

Financial/Insurance & Real Estate Ad Spending

SPENDERS													
1997		RANK #8		2000		RANK #6		2001		RANK #8			
Ad Spending \$735 million				Ad Spending \$1.26 billion				Ad Spending \$1.04 billion		Ad Spending \$692.9 million			
DOLLARS		NO. OF PAGES		DOLLARS		NO. OF PAGES		DOLLARS		NO. OF PAGES			
Amex	40.3	672.9		Amex	83.5	1144.9		State Farm	71.3	616.6	State Farm	52.3	363.0
T Rowe Price	22.0	522.9		Morgan Stanley	45.4	538.6		Citigroup	57.2	721.8	Charles Schwab	37.7	447.7
FMR	22.0	524.8		MasterCard	43.2	466.1		FMR	46.6	596.7	Allstate	30.2	231.2
Visa	21.4	432.0		FMR	42.5	612.6		MasterCard	38.0	386.3	MasterCard	28.6	295.1
State Farm	21.0	229.1		Charles Schwab	39.9	488.1		Morgan Stanley	35.8	424.0	Morgan Stanley	26.2	227.4
Merrill Lynch	20.9	350.4		State Farm	38.7	403.9		Amex	33.4	512.0	FMR	23.4	266.8
Charles Schwab	20.6	471.0		Citigroup	34.7	656.4		Charles Schwab	32.6	396.0	Visa	20.5	170.7
Franklin Resourc	18.1	316.1		T Rowe Price	28.0	502.5		Merrill Lynch	29.7	518.4	T Rowe Price	14.6	200.0
Prudential	16.1	272.6		Prudential	27.5	346.8		Prudential	23.3	267.4	Bank of Amer	13.4	136.0
Zurich	15.9	238.5		General Motors	26.9	187.7		T Rowe Price	19.2	301.0	Citigroup	13.2	160.3

Schwab surges ahead of such stalwarts as MasterCard and Morgan Stanley.

MAGAZINE CATEGORIES													
News/Bus Wkly	197.7	2164.3		News/Bus Wkly	329.8	2715.2		News/Bus Wkly	202.2	1309.9	News/Bus Wkly	156.6	1143.4
Personal Finance	153.7	3106.2		Personal Finance	200.6	2885.4		Personal Finance	161.8	2106.1	Personal Finance	87.5	1120.5
Bus/Ent Biwkly	88.4	1606.4		Bus/Ent Biwkly	132.1	1822.0		Bus/Ent Biwkly	113.2	1436.2	Sports/Ent/Leis	73.5	489.6
Sports/Ent/Leis	40.4	365.0		Sunday Mags	63.4	587.6		Sports/Ent/Leis	73.6	549.5	Bimonthly	73.5	267.0
Sunday Mags	24.6	359.5		Sports/Ent/Leis	58.7	289.1		Sunday Mags	64.7	606.8	Bus/Ent Biwkly	60.6	708.4

As other categories falter, these weeklies are holding their own.

MAGAZINES													
Money	66.0	747.7		Time	117.6	553.5		Time	72.6	318.4	Time	51.9	220.0
Time	58.7	321.7		Money	82.2	706.9		Money	66.1	513.3	Newsweek	34.6	174.7
Forbes	51.4	994.1		Newsweek	76.3	427.9		Fortune	53.4	634.6	Sports Illustrated	33.2	132.4
BusinessWeek	44.3	578.7		BusinessWeek	72.0	776.3		Forbes	52.0	645.1	Fortune	32.4	367.1
Newsweek	43.0	298		Fortune	67.1	879.4		Newsweek	50.2	273.8	Money	32.4	247.9
U. S. News & WR	41.9	437.9		Forbes	65.0	942.6		BusinessWeek	42.6	410.8	BusinessWeek	29.9	286.8
Fortune	37.0	612.3		U.S. News & WR	52.1	468.5		U.S. News & WR	36.8	306.9	Forbes	28.2	341.3
Kiplinger's	29.3	714		Barron's	41.8	1619.0		Sports Illustrated	34.4	153.4	U.S. News & WR	27.0	204.7
Barron's	26.7	1253.6		Sports Illustrated	37.0	160.4		Barron's	31.7	1136.6	Parade	25.6	31.
Smart Money	25.5	676.9		Smart Money	33.4	660.3		Parade	29.2	37.0	People	20.2	111.6

SI gains force in an otherwise dismal category, with a little help from friends like Cigna and the Hartford.

* In millions. Source: Competitive Media Reporting. † Year-to-date spending is through September 2002.

THE FUTURE

LEADERS

Time
 Even as the whole sector is aching and as the newsweeklies, in the words of Starcom's Foxley, are "obviously working for every dollar they get," *Time* stands head and shoulders above the rest, retaining the top spot for three years running thanks to big support from the likes of American Express, Prudential and TD Waterhouse. Buchholtz of Veronis Suhler Stevenson notes, "This is another category where the newsweeklies were hit hard. You

see all the brokerage houses going to hell." Threatening *Time's* standing: as *Money*, *Fortune* and *Forbes* move down the rankings, rival *Newsweek* creeps up to No. 2.

Sports Illustrated

A rare success story in the bunch, Time Inc.'s *SI* will substantially surpass last year's financial intake. *SI* benefits from those advertisers still looking for the "broad-reach numbers" they get from the big weekly players, notes PGR Media's Garrahy.

People

The Time Inc. powerhouse, with winning points like its longevity and strong female constituency, moves into the top 10 rankings, as core business, tech and news books slip. American Express, Citigroup and Cigna are vigorous spenders. Tried-and-true books like *People* are winning out in this environment. "I noticed only two cases—*O* and *Maxim*—where the 'newer generation' of magazines even cracked the top 10 for any category," notes Moynihan of Arnold MPG.

LAGGARDS

Money
 Big ouch! far this year, the Time Inc. title is doing just half the business of full-year 2001.

Fortune

Drops significantly, in both dollars and pages, from last year to current year. Also skids a position in the top 10, from No. 3 to 4.

Forbes

Ditto. Except that *Forbes* loses even more footing, falling from No. 4 to 7.

Food & Food Products Ad Spending

SPENDERS

1997	RANK #3	2000	RANK #3	2001	RANK #2	Y-T-D†	RANK #1				
Ad Spending \$1.14 billion		Ad Spending \$1.62 billion		Ad Spending \$1.68 billion		Ad Spending \$1.25 billion					
DOLLARS*	NO. OF PAGES	DOLLARS	NO. OF PAGES	DOLLARS	NO. OF PAGES	DOLLARS	NO. OF PAGES				
Phillip Morris	210.6	1858.7	Phillip Morris	338.6	2943.5	Phillip Morris	291.7	2374.4	Phillip Morris	281.3	2076.7
Milk Industry	80.3	989.3	Campbell Soup	86.7	578.0	Nestle	97.8	958.5	Nestle	60.7	537.4
Pepsico	68.8	796.3	Nestle	81.0	849.6	Campbell Soup	92.7	578.8	Campbell Soup	53.6	320.3
Diageo	68.7	1067.6	Pepsico	76.3	690.7	Diageo	81.1	978.6	Mars	50.4	373.1
Campbell Soup	42.8	347.1	Diageo	64.3	829.9	Pepsico	74.7	650.8	Diageo	49.5	540.3
Bacardi	40.6	665.4	Kellogg	61.9	530.8	General Mills	71.3	612.0	Pepsico	49.0	381.1
Conagra	38.4	359.0	General Mills	61.0	536.0	Allied Domecq	48.4	666.6	Unilever	43.8	319.9
General Mills	37.7	384.8	Hershey	54.0	501.7	Milk Industry	45.4	480.7	Milk Industry	35.3	342.5
Mars	34.1	370.5	Milk Industry	47.7	519.5	Mars	40.9	383.3	Wrigley	35.2	306.4
Nestle	28.3	345.4	Allied Domecq	39.8	649.6	Coca-Cola	40.3	421.4	Coca-Cola	33.4	289.4

Philip Morris soars and keeps on top, due to a hike in magazine spending this year by its Kraft unit.

MAGAZINE CATEGORIES

Women's Service	313.5	2055.1	Women's Service	381.0	2002.7	Women's Service	358.9	1675.6	Sports/Ent/Leis	288.4	1495.5
Sports/Ent/Leis	205.3	1308.5	Sports/Ent/Leis	310.1	1850.8	Sports/Ent/Leis	304.6	1726.1	Women's Service	284.3	1229.9
Sunday Mags	67.7	259.4	Sunday Mags	62.9	90.9	Men's Lifestyle	68.4	594.7	Women's Lifestyle	69.8	526.6
News/Bus Wkly	39.2	227.5	General Interest	54.5	190.2	Bus/Ent Biwkly	58.4	582.2	Bus/Ent Biwkly	46.0	403.2
General Interest	35.4	171.0	Epicurean	53.7	995.5	General Interest	56.5	171.8	Parenting	40.3	355.5

Weeklies steam ahead of longtime champ women's service.

MAGAZINES

BH&G	85.7	425.1	People	138.2	785.2	People	137.0	729.0	People	114.3	580.9
Sports Illustrated	78.6	393.8	BH&G	117.0	440.8	BH&G	125.3	424.9	BH&G	105.5	328.5
People	77.8	502.9	Sports Illustrated	76.7	344.8	Sports Illustrated	85.0	364.7	Sports Illustrated	71.5	285.8
Woman's Day	60.4	425.3	Woman's Day	67.4	366.5	Good Housekpg	63.9	292.0	Good Housekpg	52.3	215.6
Family Circle	53.0	341.4	TV Guide	65.8	447.5	Woman's Day	58.7	291.3	Family Circle	48.6	222.0
Parade	42.3	60.2	Good Housekpg	62.2	316.3	Family Circle	58.4	271.2	Woman's Day	40.0	194.5
Good Housekpg	40.8	236.0	Family Circle	58.5	284.7	Reader's Digest	56.5	171.8	TV Guide	32.7	218.5
Ladies' Home Jrnl	37.1	291.4	Reader's Digest	54.4	190.2	TV Guide	49.0	333.5	Reader's Digest	32.1	95.5
Reader's Digest	35.4	171.0	Parade	42.0	51.6	Parade	36.4	42.4	Martha Stewart	27.9	215.7
TV Guide	33.4	223.0	Ladies' Home Jrnl	39.0	258.9	Ladies' Home Jrnl	33.8	203.9	Rosie	26.6	186.6

* In millions. Source: Competitive Media Reporting. †Year-to-date spending is through September 2002.

People leads the pack for third year straight, with major support from the likes of Kraft, Campbell's Soup and Dannon.

THE FUTURE

LEADERS

People

► The Time Inc. weekly leaves the others in its dust for the third year straight, thanks to the likes of Wrigley's, Pepperidge Farm and Unilever Bestfoods brands like Ragu. The numbers show it is well on its way to beating last year. "There are a couple of categories—food, toiletries—that I would categorize as necessity categories, that in the near term will hold their own better than most other categories," notes DePonte of Price-WaterhouseCoopers.

Meanwhile, Jurmain of Lowe Lintas & Partners calls *People* one of the industry's "hard-working soldiers," able to sustain itself during tough times because of its overwhelming strength in core categories such as food.

Sports Illustrated

► The granddaddy of sports magazines is comfortably on schedule to surpass last year's strong numbers. *S/I*'s standing in this category comes from big beverage advertisers including Johnnie Walker and Jose Cuer-

vo, along with candy makers Mars (Twix) and Hershey Foods Corp.

Martha Stewart Living

► Amid her problems, Martha enters the top 10 rankings, thanks to such spenders as Keebler, Post cereals and Nestlé (Stouffer's). The verdict is still out whether her business woes will drag down her image, and the magazine along with it, in the long term. DuPonte says, "I'm sure Martha will do fine, she'll go the way the category goes."

LAGGARDS

Woman's Day

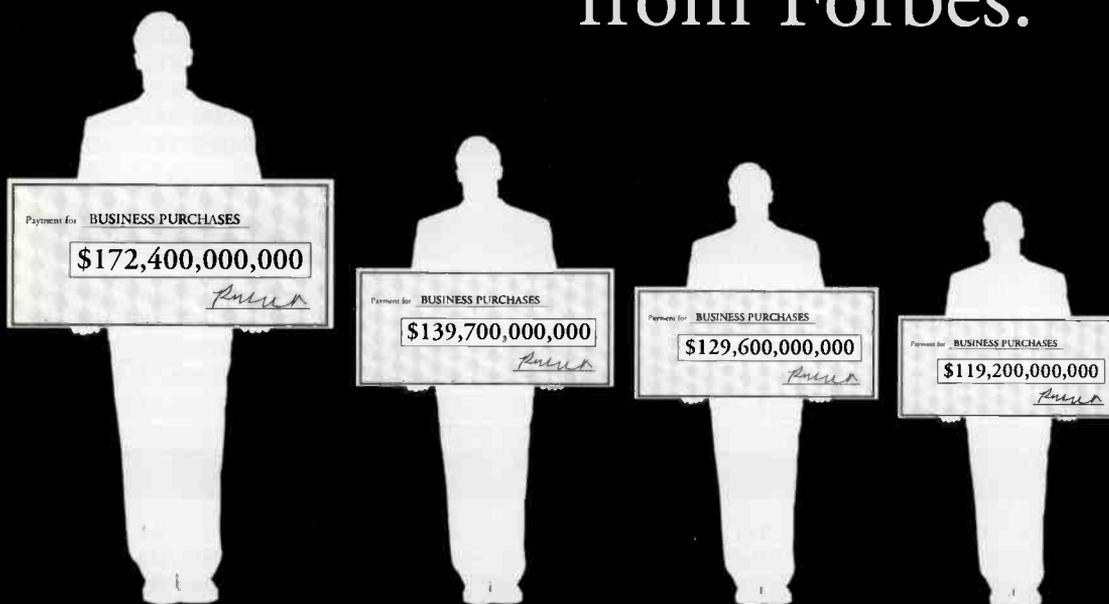
► A bruising decline in dollars, coupled with a slide in rank from No. 5 to 6 (G+J's *Family Circle* sped ahead), keeps back Hachette Filipacchi Magazines' *Woman's Day*, as the women's service family loses its overall standing.

TV Guide

► Likewise, *TV Guide* just isn't keeping up, even as its overall category of sports/entertainment/leisure weeklies is coming on strong.

Here's another great investment tip from Forbes.

\$200 B -
\$180 B -
\$160 B -
\$140 B -
\$120 B -
\$100 B -
\$080 B -
\$060 B -
\$040 B -
\$020 B -
\$000 B -



Forbes

WSJ

Fortune

BW

CPM: **Forbes** \$96.72 **WSJ** \$282.84 **Fortune** \$121.81 **BW** \$150.00

Top Management Business Purchases

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Source: MRI Spring 2002

Forbes' Top Management audience accounts for over \$170 billion in business purchases. That's billions more than any other business publication.

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CAPITALIST TOOL®

Household Furnishings & Supplies Ad Spending

SPENDERS																
1997		RANK #12		2000		RANK #12		2001		RANK #12		Y-T-D†		RANK #12		
Ad Spending \$211.4 million				Ad Spending \$287.8 million				Ad Spending \$275.5 million				Ad Spending \$176.6 million				
DOLLARS*		NO. OF PAGES		DOLLARS		NO. OF PAGES		DOLLARS		NO. OF PAGES		DOLLARS		NO. OF PAGES		
Furn Brands Intl	26.1	488.9	Furn Brands Intl	20.8	368.0	Armstrong	20.6	169.2	Armstrong	12.3	91.7	Furn Brands Intl	12.3	148.6		
Perstorp	8.6	407.0	Springs Ind	19.6	204.2	Furn Brands Intl	12.6	222.6	Furn Brands Intl	12.3	148.6					
La-Z-Boy	8.2	43.5	Armstrong	12.2	101.5	Perstorp	10.8	94.3	Mohawk	7	68.0					
Westpoint Stev	5.3	67.2	Perstorp	11.3	111.2	Dupont	10.1	89.3	Pillowtex	5.6	71.2					
Sauder	5.2	57.1	Mohawk	10.5	125.7	Mohawk	9.7	117.6	Dupont	5.6	45.7					
Oneida	5.1	70.2	Sealy	8.3	87.4	Avon	9.5	57.1	La-Z-Boy	4.9	46.6					
Waterford	5.0	146.7	Dupont	8.0	86.3	La-Z-Boy	6.8	72.5	Hunter Fans	4.8	50.2					
WKI	4.7	43.0	La-Z-Boy	7.1	48.9	Sealy	6.0	66.0	Furnishings Intl	4.8	59.0					
Sealy	3.8	59.6	Furnishings Intl	6.6	94.7	Bernhardt	5.6	96.8	General Electric	4.4	37.0					
Hunter Douglas	3.7	63.4	Bernhardt	6.2	134.0	Furnishings Intl	5.3	79.5	Bernhardt	4.1	54.0					

MAGAZINE CATEGORIES											
Shelter	54.6	1189.8	Shelter	81.6	1424.1	Bimonthly*	71.6	1495.7	Bimonthly*	51.0	991.2
Bimonthly*	45.9	1458.3	Bimonthly*	71.9	1661.1	Shelter	66.5	1153.2	Shelter	42.9	642.8
Women's Service	31.9	216.6	Women's Service	39.6	196.8	Women's Service	37.6	184.8	Women's Service	22.2	94.8
Sunday Mags	12.2	103.3	Women's Lifestyle	18.7	216.5	Women's Lifestyle	27.3	222.1	Women's Lifestyle	14.8	137.0
Women's Lifestyle	11.2	160.7	Sunday Mags	8	91.2	Sunday Mags	6.9	62.8	Parenting	5.1	43.2

MAGAZINES											
BH&G	18	112.5	House Beautiful	23.8	293.0	BH&G	21.5	88.9	BH&G	15.0	57
House Beautiful	15.8	248.3	BH&G	22.4	103.6	House Beautiful	21.2	255.2	House Beautiful	13.3	142.2
Arch Digest	11.5	323.8	Elle Decor	17.3	408.8	Elle Decor	16.6	353.3	Traditional Home	10.6	120.4
Elle Decor	9.9	295.8	Arch Digest	17.2	425.6	Arch Digest	16.2	387.2	Martha Stewart	10.4	84.4
Home	9.5	196.3	Traditional Home	14.3	239.8	Traditional Home	13.8	407	Elle Decor	9.3	407
Modern Bride	9.1	246.0	Home	14.1	217.0	Martha Stewart	13.5	115.2	Arch Digest	9.1	224.3
Country Living	8.9	120.2	Martha Stewart	13.1	120.0	Metro Home	12.2	179.8	Metro Home	8.8	129.9
Martha Stewart	8.1	87.0	Metro Hom	11.2	182.2	House & Garden	10.5	288.8	Country Home	8.4	71.3
Good Housekpg	8	50.7	Good Housekpg	9.3	43.9	O	9.9	43.3	Country Living	7.5	71.8
Bride's	8	230.0	House & Garden	9.2	289.6	Country Home	9.0	85.5	Southern Accents	4.5	173

* In millions. Source: Competitive Media Reporting. † Year-to-date spending is through September 2002. *Bimonthly category includes shelter titles.

THE FUTURE

LEADERS

Better Homes and Gardens

While women's service titles sag overall, *BH&G* looks to stay on top of the heap, thanks to a renewed focus on home life and family, and a die-hard housing market. "We've seen a shift away from strictly 'showcase' shelter titles toward titles that embrace aspects of the home that feed human connectedness," says Pais of Fallon. Readers these days, she observes, are favoring those titles that reflect their "real

lives." Advertisers like Armstrong and 3M's Bissell brand are helping to keep the venerable *BH&G* No. 1.

Martha Stewart Living

Despite her personal and business woes, the doyenne of domesticity's eponymous magazine, at least for now, looks to stay on track. As Buchholtz of Veronis Suhler Stevenson points out, "The [company's] stock price doesn't necessarily reflect the business realities of the magazine." Advertisers, while still devoted, are taking

the pulse of Stewart's audience as her insider-trading scandal continues to unfold. And some media observers are not as bullish. FCB's Connors predicts, "Martha may see a backlash. She will probably see some drop-off." Armstrong, Mohawk carpets and Fieldcrest Cannon linens remain big backers.

Traditional Home

Again, renewed emphasis on home and home improvement drives this title up. The magazine is on track to meet last year's intake. "Post-9/11, there's

very much a return to home in many ways, to a feeling of wanting to replenish the home," says Garrahy of PGR Media.

LAGGARDS

Architectural Digest

The once-mighty king of home-design titles continues to lose share in this small but important ad category. As Fallon's Pais points out, "over-the-top aspirational" home magazines like *AD*, *Elle Decor* and *House & Garden* are losing ground to titles that "embrace the livability of one's home."

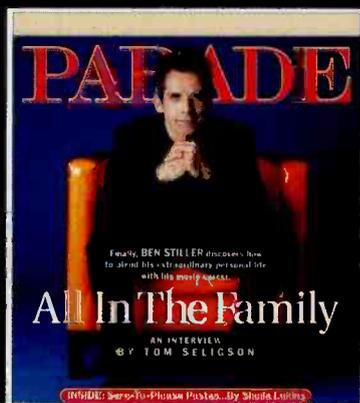
Strong magazine commitments from Furniture Brands' Broyhill, Thomasville, Drexel Heritage and Henredon units put this spender in neck-and-neck quest for top spot.

Women's service and women's lifestyle groups still fall way behind shelter and bimonthlies.

Longtime dominant "aspirational" titles such as *AD*, *Elle Decor* and *House & Garden* are slipping, while *Southern Accents* joins the top 10 takers of home spending.

“ I GREW UP READING PARADE MAGAZINE
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THE CELEBRITY PROFILES. ”

—LINNEA OLSON, 26, FASHION EDITOR



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Media & Advertising Ad Spending

SPENDERS															
1997		RANK #9		2000		RANK #7		2001		RANK #9		Y-T-D‡		RANK #7	
Ad Spending \$622.7 million				Ad Spending \$1.24 billion				Ad Spending \$1 billion				Ad Spending \$698 million			
	DOLLARS*	NO. OF PAGES		DOLLARS	NO. OF PAGES		DOLLARS	NO. OF PAGES		DOLLARS	NO. OF PAGES		DOLLARS	NO. OF PAGES	
AOL/TW	108.2	1129.2	AOL/TW	158.1	1558.0	AOL/TW	143.3	1376.2	AOL/TW	120.0	1089.4	AOL/TW	120.0	1089.4	
Walt Disney	58.6	637.0	Walt Disney	89.0	998.5	Walt Disney	100.3	886.9	Media Networks	62.0	334.9	Media Networks	62.0	334.9	
Natl Amusments	57.6	571.7	Media Networks	85.5	629.3	Media Networks	73.1	447.6	Walt Disney	50.9	402.5	Walt Disney	50.9	402.5	
News Corp	55.9	543.1	Natl Amusments	75.0	788.0	Natl Amusments	57.2	533.6	KKR	40.9	675.3	KKR	40.9	675.3	
Media Networks	45.6	275.0	Women's Mktg	55.5	1506.7	Advance Pub	56.0	770.0	Natl Amusment	37.3	379.5	Natl Amusment	37.3	379.5	
General Electric	34.4	293.6	News Corp	51.3	522.4	Women's Mktg	55.6	1293.7	Women's Mktg	36.6	862.6	Women's Mktg	36.6	862.6	
Women's Mktg	33.8	1343.0	General Electric	39.0	339.0	News Corp	42.7	407.0	Advance Pub	32.6	408.7	Advance Pub	32.6	408.7	
Vivendi Univ	19.2	216.6	Discovery Comm	35.5	312.6	General Electric	25.4	239.7	News Corp	28.7	276.1	News Corp	28.7	276.1	
A&E Networks	12.9	140.8	Advance Pub	31.4	503.0	Hearst Corp	23.9	227.3	Discovery	23.9	151.9	Discovery	23.9	151.9	
Bertelsmann	11.5	198.9	Bertelsmann	20.9	278.5	A&E Networks	22.2	208.3	Hearst Corp	20.4	180.9	Hearst Corp	20.4	180.9	

MAGAZINE CATEGORIES															
Sports/Ent/Leis		2713.3		Sports/Ent/Leis		3197.0		Sports/Ent/Leis		2840.4		Sports/Ent/Leis		1902.7	
News/Bus Wkly		334.9		News/Bus Wkly		832.3		News/Bus Wkly		551.0		News/Bus Wkly		378.6	
Women's Service		286.6		Bus/Ent Biwkly		1025.0		Fashion/Beauty		663.8		Bus/Ent Biwkly		286.4	
Bus/Ent Biwkly		356.1		Business/Tech		2211.4		Bus/Ent Biwkly		492.7		Fashion/Beauty		409.8	
Sunday Mags		83.8		Fashion/Beauty		543.4		Women's Service		290.9		Teen		200.5	
Sports/Ent/Leis	324.9	2713.3	Sports/Ent/Leis	412.9	3197.0	Sports/Ent/Leis	347.0	2840.4	Sports/Ent/Leis	231.9	1902.7	Sports/Ent/Leis	231.9	1902.7	
News/Bus Wkly	62.4	334.9	News/Bus Wkly	142.4	832.3	News/Bus Wkly	101.4	551.0	News/Bus Wkly	75.5	378.6	News/Bus Wkly	75.5	378.6	
Women's Service	27.4	286.6	Bus/Ent Biwkly	180.6	1025.0	Fashion/Beauty	49.4	663.8	Bus/Ent Biwkly	30.9	286.4	Bus/Ent Biwkly	30.9	286.4	
Bus/Ent Biwkly	18.0	356.1	Business/Tech	54.3	2211.4	Bus/Ent Biwkly	48.0	492.7	Fashion/Beauty	30.1	409.8	Fashion/Beauty	30.1	409.8	
Sunday Mags	16.1	83.8	Fashion/Beauty	38.4	543.4	Women's Service	40.5	290.9	Teen	18.0	200.5	Teen	18.0	200.5	

MAGAZINES															
TV Guide		1395.5		TV Guide		1350.0		TV Guide		1075.0		TV Guide		517.5	
People		432.2		People		537.2		People		416.0		People		268.7	
Sports Illustrated		167.0		Sports Illustrated		251.6		Sports Illustrated		199.6		Sports Illustrated		144.7	
Time		110.5		Entertainment Wkly		505.4		Entertainment Wkly		380.5		Entertainment Wkly		290.2	
Entertainment Wkly		318.2		Time		176.2		Time		130.6		Newsweek		114.2	
Newsweek		74.3		Newsweek		193.4		Newsweek		171.7		Time		101.0	
U.S. News & WR		37.4		Forbes		411.7		BusinessWeek		176.7		Parade		19.5	
New Yorker		220.7		BusinessWeek		331.4		Parade		18.9		New York		338.7	
Rolling Stone		171.3		Industry Standard		1261.9		Fortune		146.0		U.S. News & WR		62.4	
Parade		7.7		Fortune		280.9		Good Housekpg		70.7		Seventeen		150.2	
TV Guide	187.9	1395.5	TV Guide	181.7	1350.0	TV Guide	145.0	1075.0	TV Guide	71.3	517.5	TV Guide	71.3	517.5	
People	65.5	432.2	People	93.5	537.2	People	75.3	416.0	People	51.7	268.7	People	51.7	268.7	
Sports Illustrated	33.9	167.0	Sports Illustrated	59.2	251.6	Sports Illustrated	51.9	199.6	Sports Illustrated	38.9	144.7	Sports Illustrated	38.9	144.7	
Time	29.5	110.5	Entertainment Wkly	52.8	505.4	Entertainment Wkly	41.3	380.5	Entertainment Wkly	33.8	290.2	Entertainment Wkly	33.8	290.2	
Entertainment Wkly	25.2	318.2	Time	51.9	176.2	Time	40.2	130.6	Newsweek	27.0	114.2	Newsweek	27.0	114.2	
Newsweek	17.0	74.3	Newsweek	41.8	193.4	Newsweek	30.2	171.7	Time	24.9	101.0	Time	24.9	101.0	
U.S. News & WR	9.5	37.4	Forbes	29.2	411.7	BusinessWeek	17.0	176.7	Parade	16.8	19.5	Parade	16.8	19.5	
New Yorker	8.4	220.7	BusinessWeek	27.2	331.4	Parade	16.0	18.9	New York	15.7	338.7	New York	15.7	338.7	
Rolling Stone	7.8	171.3	Industry Standard	26.2	1261.9	Fortune	15.5	146.0	U.S. News & WR	12.7	62.4	U.S. News & WR	12.7	62.4	
Parade	7.6	7.7	Fortune	21.8	280.9	Good Housekpg	14.2	70.7	Seventeen	12.6	150.2	Seventeen	12.6	150.2	

* In millions. Source: Competitive Media Reporting. ‡Year-to-date spending is through September 2002.

Ouch! Disney's much-reduced spending spells trouble for publishers.

While way down from last year, this category remains by far the most dominant.

As Time struggles to meet last year's intake, Newsweek can expect more revenue.

THE FUTURE

LEADERS

People

► The venerable Time Inc. personality and entertainment weekly stays on track, easily beating sister pubs *Sports Illustrated* and *Entertainment Weekly*. "Despite all the talk about fragmentation and verticalization of the magazine industry, the large, mass-reach publications are still king," says Moynihan of Arnold MPG. Big books like *People* don't rely on one particular ad category, he points out—"many of the top books are top books across sev-

eral categories." *People* shows up in the top 10 in a range of other categories, including financial, drugs/remedies, tech and automotive.

Entertainment Weekly

► *EW* is on track to meet or beat last year's intake, even as the magazine category it shares with other top-10ers *TV Guide*, *People* and *SI* is lagging behind.

Newsweek

► While the newsmagazines are having a generally tough time of it, *Newsweek* this year is on its

way to beating last year's numbers, while rival *Time* is falling back and *U.S. News & World Report* has fallen out of the top rankings.

LAGGARDS

BusinessWeek

► News and business weeklies as a whole are on their way to beating or meeting last year, but *BW*—once a player in the media/ad category—has fallen out altogether. *BW*'s slide some attribute to the larger shift in momentum from business to consumer books. "Business

magazines have experienced the worst of the contraction," says Ken Sacharin of Mediaedge:cia.

TV Guide

► Even though *TV Guide* remains comfortably on top, so far this year it has sold less than half the ad pages it did full-year 2001. Because of its disproportionate share of media/ad business, this title is particularly vulnerable to the slacking fortunes of media companies, whose own sliding ads have forced them to cut their own marketing budgets.

Retail Ad Spending

SPENDERS											
1997			2000			2001			Y-T-D‡		
Ad Spending \$488.9 million			Ad Spending \$1.19 billion			Ad Spending \$1.00 billion			Ad Spending \$875.1 million		
	RANK #11		RANK #8		RANK #10			RANK #9			
	DOLLARS*	NO. OF PAGES	DOLLARS	NO. OF PAGES	DOLLARS	NO. OF PAGES	DOLLARS	NO. OF PAGES	DOLLARS	NO. OF PAGES	
Sears	22.7	305.2	Target	50.2	798.7	Target	57.4	918.2	Target	33.7	722.9
Roll Intl	16.0	69.2	LVMH	35.0	565.8	Home Depot	39.1	461.1	Sears	22.9	199.7
Nordstrom	14.6	317.9	Wal-Mart	27.8	252.8	LVMH	33.0	528.0	LVMH	19.5	277.3
Home Depot	12.9	157.4	Saks	26.5	594.5	Saks	30.5	506.1	Kmart	18.8	159.0
Haverty Furn.	12.7	5.6	Polo/RL	24.9	348.2	Sears	26.4	254.2	Best Buy	17.9	162.2
Foot Locker	11.6	202.8	Home Depot	19.7	228.0	Best Buy	22.6	201.4	Hallmark	17.4	120.8
Federated	11.6	354.2	Federated	19.6	387.1	Roll Intl	19.9	87.0	Polo/RL	16.6	199.0
IQS Brands	10.7	35.5	Haverty Fu'n.	19.3	6.9	Federated	19.1	346.1	Roll Intl	15.7	57.6
Versace	9.4	209.9	Best Buy	19.0	210.9	Polo/RL	19.0	253.2	Home Depot	14.4	165.1
JC Penney	8.9	152.0	Roll Intl	18.7	79.2	Wal-Mart	17.9	199.8	Federated	14.2	262.8

Target's aggressive push into "magazines with attitude" will continue, according to Tom Woldum of Haworth, one of the retailer's agencies.

Gulp! Home Depot committing much less to magazines.

MAGAZINE CATEGORIES											
Fashion	87.9	1935.1	Fashion/Beauty	197.9	3425.7	Fashion/Beauty	145.2	2223.3	Fashion/Beauty	119.9	1865.4
Sunday mags	74.9	927.9	Sunday Mags	115.9	816.7	Sunday Mags	99.8	663.6	Sunday Mags	85.2	613.4
Sports/Ent/Leis	46.1	768.4	Sports/Ent/Leis	87.6	1345.6	Sports/Ent/Leis	82.7	1129.2	Sports/Ent/Leis	43.2	559.1
Shelter	31.3	523.6	Shelter	52.2	788.3	Bimonthly	49.6	1327.6	Shelter	28.3	373.2
Women's Service	16.1	95.8	Bimonthly	41.9	1148.9	General Interest	49.1	775.8	Bimonthly	26.3	824.7

Monthly, bimonthly shelter titles slipping, while fashion/beauty keeps on track.

MAGAZINES											
Parade	29.8	29.9	Vogue	53.2	932.6	Vogue	48.5	800.5	Parade	34.7	30.9
NY Times Mag	25.8	513.3	In Style	49.7	683.5	Parade	43.1	37.3	Vogue	34.5	558.9
W	25.2	643.8	Parade	48.7	39.6	W	41.1	693.9	NY Times Mag	28.8	380.3
Vogue	22.7	445.4	NYTimes Mag	45.0	729.4	NYTimes Mag.	39.9	592.1	In Style	24.8	289.1
Southern Living	17.1	193.1	W	38.5	755.9	In Style	39.6	458.4	W	24.0	466.9
Harper's Bazaar	15.4	343.1	Vanity Fair	28.6	450.4	Vanity Fair	28.7	441.3	Vanity Fair	19.5	300.9
Vanity Fair	13.1	248.6	Martha Stewart	28.5	260.3	BH&G	24.1	94.5	Harper's Bazaar	16.9	244.4
People	12.9	86.9	People	28.1	165.4	Martha Stewart	23.4	199.7	USA Weekend	15.1	27.5
BH&G	11.8	63.1	BH&G	27.0	104.0	People	22.9	128.4	YM	14.1	147.8
LA Times Mag.	10.2	362.1	Harper's Bazaar	25.9	467.9	Harper's Bazaar	20.3	334.4	BH&G	13.9	76.9

YM leads the charge, overtaking such rivals as *Seventeen* and *Teen People* and helping to drive up the teen magazine market's quest for more retail dollars.

*In millions. Source: Competitive Media Reporting. †Year-to-date spending is through September 2002.

THE FUTURE

LEADERS

Vogue
 Conde Nast's fashion bible has lost some ground, but is still on the way to reaching last year's numbers and staying atop the heap thanks to multipage spreads by Saks, Nordstrom and Talbots. Healthy gains over five years, even as overall retail has slacked. September 2002 issue at 576 pages, was biggest in 13 years. Notes Veronis Suhler Stevenson's Buchholtz: "A lot of the fashion and beauty books have done just fine, and that's counter to what people have

been saying." Adds Lowe Lintas & Partners' Jurmain, "A few magazines flourish during the tougher times, usually those that invest in real brand equity—*Vogue* [is among those that] seem to weather well."

In Style

While retail has slipped dramatically, the Time Inc. women's lifestyle title continues upward, gains a slot in the top 10, knocking out *W* for the current year-to-date (for now). Saks, Banana Republic and Target are big backers. The "rapidity" with

which the retail environment has changed—slacking retail sales and sliding ad spending—will continue to affect players, as retailers tailor media buys to attract that "elusive customer," says PGR's Garrahy.

YM

Gruner + Jahr USA's hot teen title leaps into the top 10, thanks to Wal-Mart, Benetton and Sam Goody. The magazine ranked 44th for full-year 2001, with just \$6.5 million in retail dollars, but now surpasses arch rivals *Seventeen* and *Teen People*.

LAGGARDS

Even a 29-page Neiman Marcus spread for September couldn't keep up the Fairchild title's numbers. Big cuts by luxury spender LVMH—including retailers Sephora, Celine and Marc Jacobs—spells trouble for fashion/beauty family.

Martha Stewart Living

Martha gets hammered, so far this year raking in just \$8.4 million in retail and falling out of the top 10 (and into the 20s).

Technology & Telecom Ad Spending

SPENDERS

1997		RANK #4		2000		RANK #2		2001		RANK #7		Y-T-D†		RANK #10	
Ad Spending \$1.07 billion				Ad Spending \$1.76 billion				Ad Spending \$1.10 billion				Ad Spending \$589 million			
DOLLARS*	NO. OF PAGES	DOLLARS	NO. OF PAGES	DOLLARS	NO. OF PAGES	DOLLARS	NO. OF PAGES	DOLLARS	NO. OF PAGES	DOLLARS	NO. OF PAGES	DOLLARS	NO. OF PAGES	DOLLARS	NO. OF PAGES
Hewlett-Packard	119.7	1630.8	IBM	108.6	1509.8	Microsoft	131.8	1553.7	Microsoft	63.5	638.9	Microsoft	41.0	406.6	
Microsoft	86.4	1343.7	Hewlett-Packard	104.4	1503.9	Hewlett-Packard	78.3	407.0	Apple	41.0	406.6	Apple	37.4	380.4	
IBM	65.0	973.7	Microsoft	82.0	1105.0	IBM	69.6	886.0	IBM	37.4	380.4	Hewlett-Packard	24.5	262.8	
NEC	33.2	610.9	Apple	50.7	603.8	Apple	38.0	377.0	Hewlett-Packard	24.5	262.8	Sprint	22.0	221.9	
AT&T	28.4	606.5	Netpliance	34.2	72.1	Fujitsu	27.9	281.6	Sprint	22.0	221.9	Verizon	17.7	195.5	
3Com	26.8	685.9	AOL/TW†	26.8	219.5	AT&T	23.5	396.8	Verizon	17.7	195.5	AOL/TW	15.2	115.5	
Toshiba	21.3	320.8	Intel	25.5	450.8	Sprint	21.7	260.9	AOL/TW	15.2	115.5	Adobe	13.3	111.7	
Sun Microsystems	20.8	333.0	Worldcom	20.7	349.6	Intel	21.0	223.2	Adobe	13.3	111.7	Fujitsu	12.8	125.1	
Intel	20.0	378.3	Sony	19.8	307.0	AOL/TW	18.1	154.7	Fujitsu	12.8	125.1	AT&T	12.3	126.0	
Fujitsu	19.4	404.6	Sprint	18.9	315.0	Samsung	15.8	197.7	AT&T	12.3	126.0				

In an otherwise sorry category, Apple will spend more on magazines.

MAGAZINE CATEGORIES

Business/Tech	398.6	10317.3	News/Bus Wkly	525.6	4739.9	News/Bus Wkly	364.2	2969.8	News/Bus Wkly	204.1	1570.1
News/Bus Wkly	318.7	2756.6	Business/Tech	496.5	13743.2	Business/Tech	249.1	4701.7	Business/Tech	102.4	1527.2
Bus/Ent Biwkly	67.0	1818.7	Bus/Ent Biwkly	339.7	4550.5	Bus/Ent Biwkly	186.7	2237.8	Bus/Ent Biwkly	95.3	1082.3
Sports/Ent/Leis	30.0	175.3	Sports/Ent/Leis	63.0	373.3	Sports/Ent/Leis	70.5	493.8	Sports/Ent/Leis	60.8	396.4
Personal Finance	10.0	90.3	Sunday Mags	56.4	85.3	Enthuslast	8.3	66.8	Sunday Mags	6	6.7

As newsmagazines and business books fall behind, this category stays juiced.

MAGAZINES

PC Magazine	176.4	3065	BusinessWeek	300.5	3127.8	BusinessWeek	179.8	1716.6	BusinessWeek	88.8	851.7
BusinessWeek	131	1589.4	Fortune	182.3	2390.2	Fortune	96.2	1182.7	Time	50.5	235.8
Time	78.2	395.4	Forbes	148.3	2053.7	Time	95.2	410.7	Fortune	47	553.5
Newsweek	73.5	457.7	PC Magazine	112.9	1697.8	PC Magazine	89.6	1207.7	PC Magazine	45.1	567.2
Smart Business	64.9	1596.2	Time	106.7	478.8	Forbes	79.2	945.6	Newsweek	36.6	173
Fortune	56.8	915.3	Industry Standard	89	4075.2	Newsweek	57	287.7	Forbes	37.7	401.5
Windows	47.7	1538	Newsweek	80	415.8	Sports Illustrated	34.7	147	Sports Illustrated	26.2	106.7
Forbes	45.9	850.2	Business 2.0	53.4	2147.7	Industry Standard	23	773.3	People	15.1	80.7
U.S. News & WR	36	314.1	Parade	43.8	58.3	Inc	21.7	290	EW	13.3	115
Inc	31.3	486.7	Inc	43	589.7	U.S. News & WR	21.5	160.5	Inc	13	158.3

* In millions. Source: Competitive Media Reporting. †CMR restates acquisitions for prior years. ‡Year-to-date spending is through September 2002.

Tech/telecom dollars are leaving more traditional venues and flooding broad-based books like *People*.

THE FUTURE

LEADERS

People

► Yes, the \$15.1 million it has made in this category so far this year is a pittance compared to its overall ad revenues, and to tech/telecom spending on titles like *BusinessWeek*, *Forbes* and *Fortune*. But *People's* entry in the top 10 shows that broad-based books are getting a bigger piece of the action.

Entertainment Weekly

► Again, that a sports/entertainment/leisure weekly like *EW* is showing up as one of the

biggest takers of tech/telecom spending is significant.

LAGGARDS

BusinessWeek

► It goes without saying there are many more losers than winners to be found here, with ad spending in the category so far this year at less than half last year's full-year total. As the top beneficiary of tech/telecom spending, *BusinessWeek* has also been one of the hardest hit, with less than half the intake so far this year compared to full-year 2001. PriceWaterhouse-

Coopers' DePonte predicts it will be perhaps another year before the category gets back on its feet: "There's too much supply, and it will take longer to get the supply/demand balance back in check." Some good news for the category: Verizon's accelerated ad spending looks to benefit publishers.

Fortune

► The numbers tell the story, and what a sad story it is: The Time Inc. title drops a notch in the top 10, and so far this year is earning about half full-year

2001. This despite continued commitments from big spenders like Microsoft and Samsung.

Forbes

► Like major rival *Fortune*, it falls a notch, even as Sharp, Sprint, Intel, Cingular and AT&T pony up. The worst part of it: The news doesn't appear to be getting better anytime soon. Business and tech books "have had a tough year and will continue to have a tough year," says April of OMD USA. "I see no indication it will turn around."

"I figured out how to save the company money."



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Toiletries & Cosmetics Ad Spending

SPENDERS								
1997		2000		2001		Y-T-D†		
RANK #6		RANK #10		RANK #5		RANK #5		
Ad Spending \$924.5 million		Ad Spending \$1.07 billion		Ad Spending \$1.18 billion		Ad Spending \$853 million		
DOLLARS*	NO. OF PAGES	DOLLARS	NO. OF PAGES	DOLLARS	NO. OF PAGES	DOLLARS	NO. OF PAGES	
P&G	187.0	2298.7	P&G	200.7	1998.1	P&G	167.2	1366.8
Estee Lauder	87.8	1518.6	L'Oreal	151.1	2076.5	L'Oreal	172.0	2149.1
L'Oreal	81.4	1285.9	Estee Lauder	90.6	1366.7	Estee Lauder	84.8	1132.4
Reckitt Benckiser	76.3	1103.0	Unilever	76.1	1007.0	J&J	72.5	786.7
Unilever	63.4	788.7	J&J	50.3	656.5	Beiersdorf	69.4	736.8
MacAndrews/For	54.4	1052.2	MacAndrews/For	47.5	641.2	Unilever	60.5	694.4
J&J	42.7	528.6	Beiersdorf	46.8	556.6	MacAndrews/For	60.4	708.6
Kimberly Clark	24.4	278.5	Kimberly Clark	45.4	428.9	Kimberly Clark	58.0	492.9
Renaissance	23.6	336.6	Reckitt Benckiser	35.2	481.9	Reckitt Benckiser	54.5	696.4
Elizabeth Arden	22.2	429.7	LVMH/Moët	23.9	411.2	KAO	31.0	228.2
						KAO	26.2	229.4

MAGAZINE CATEGORIES								
Fashion/Beauty	304.0	5496.5	Fashion/Beauty	356.3	4854.1	Fashion/Beauty	237.5	2499.1
Women's Service	186.3	1417.7	Women's Service	171.5	1095.0	Women's Service	116.0	634.0
Sports/Ent/Leis	104.9	679.0	Sports/Ent/Leis	80.8	446.3	Sports/Ent/Leis	71.8	369.4
Teen	54.3	905.6	Teen	76.7	989.4	Teen	65.9	751.5
General Interest	23.3	539.8	Women's Lifestyle	35.6	435.4	Women's Lifestyle	62.1	504.2

MAGAZINES								
Cosmopolitan	74.8	731.1	Cosmopolitan	92.3	737.8	Cosmopolitan	96.7	675.3
People	69.3	474	Glamour	59.9	690.5	People	75.9	422.4
Glamour	48.9	728.6	People	59.3	348.2	Glamour	58.6	596.6
Vogue	37.6	691	In Style	38.7	558	Vogue	39.1	549
Ladies' Home Jrnl	35.3	293.3	Vogue	37.2	567	In Style	38.1	499
Good Housekpg	30	181.8	Seventeen	34.6	411.6	O	35.4	357.8
Seventeen	29.8	478.5	Good Housekpg	31	163.3	Seventeen	33.6	360.6
Redbook	29.4	308.7	Woman's Day	28.5	169.4	Allure	33	578.6
Allure	28	737.7	Elle	27.6	434.3	Good Housekpg	32.9	155.7
Elle	28	572.9	Allure	26.4	540.1	BH&G	31.9	113.2
						Redbook	21.5	204.3

* In millions. Source: Competitive Media Reporting. †Year-to-date spending is through September 2002.

THE FUTURE			
<p>LEADERS</p> <p>Cosmopolitan</p> <p>Major commitments from the likes of Estée Lauder, L'Oréal and Lancôme keep Hearst's <i>Cosmo</i> ahead of the pack, although Time Inc.'s <i>People</i> is nipping at its heels. The continued strength of this ad category through the tough times doesn't surprise most observers. "When the economy is down, things like fragrances and toiletries do well," says Garrahy of PGR Media. "It's low out-of-pocket for consumers to have that luxurious feeling." Veronis' Buch-</p>	<p>holtz notes toiletries/cosmetics has held up at a time when "everyone feels the industry is in such bad shape." Meanwhile, expect a strong fourth-quarter showing this year due to a backlog of launches following 9/11 last year.</p> <p>Seventeen</p> <p>Of all the players in the teen pack, Primedia's venerable <i>Seventeen</i> is still getting the biggest share of this business, and driving the teen category's relative strength. Advertisers clearly are favoring more "risk-averse"</p>	<p>titles, says Media Kitchen's Woolmington.</p> <p>Self</p> <p>The Condé Nast women's health/fitness monthly enters the top 10 here, even as the big fashion/beauty books take a beating. Estée Lauder, Revlon and L'Oréal remain among its big customers.</p> <p>LAGGARDS</p> <p>Good Housekeeping</p> <p>As women's lifestyle books like Time Inc.'s <i>In Style</i> and Hearst and Oprah Winfrey's <i>O</i></p>	<p>hold their own, the likes of Hearst's <i>Good Housekeeping</i> seem to be having a hard time. The magazine boosted its intake in this category last year but this year fell out of the top 10 altogether. "Women's lifestyle is growing, and that may be hurting women's service a little," says Connors of FCB.</p> <p>Better Homes and Gardens</p> <p>Likewise, <i>BH&G</i> falls out of the top 10, despite continued support from big customers like Procter & Gamble.</p>

P&G's continued strong commitment to magazines means it remains the biggest spender by far.

Women's lifestyle grows while dominant fashion/beauty books as a whole falter.

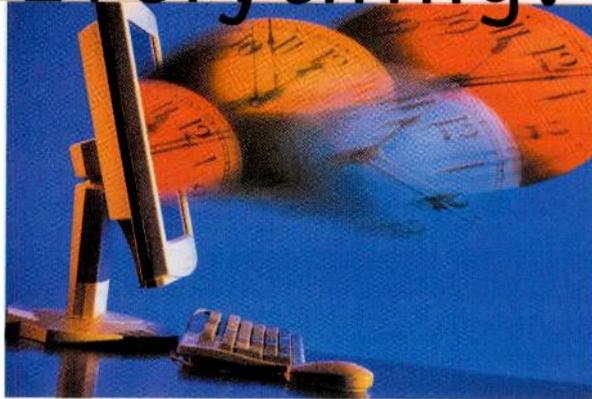
In the hotly competitive teen field, *Seventeen* still gets the bulk of toiletries/cosmetics dollars.

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Transportation, Hotels & Resorts Ad Spending

SPENDERS

1997	RANK #10	2000	RANK #11	2001	RANK #11	Y-T-D*	RANK #11				
Ad Spending \$614.6 million		Ad Spending \$803.9 million		Ad Spending \$802.3 million		Ad Spending \$528.1 million					
DOLLARS	NO. OF PAGES	DOLLARS	NO. OF PAGES	DOLLARS	NO. OF PAGES	DOLLARS	NO. OF PAGES				
Six Continents	21.9	150.3	Hilton	31.1	414.6	Hilton	27.8	319.0	Hilton	25.5	229.0
Val Corp	19.9	292.6	Delta	22.9	341.9	Marriott	22.0	283.8	Marriott	18.8	255.0
Amex	19.0	368.3	AMR Corp	21.2	386.4	Voyager	16.7	190.5	Starwood	14.9	227.0
Delta	17.9	264.5	Choice Hotels	20.2	132.9	Amex	15.6	283.1	USA Intl	11.0	97.3
Marriott	17.4	243.9	Marriott	17.3	282.8	Six Continents	14.3	129.3	Six Continents	10.0	100.6
Hilton	17.2	303.2	Starwood	13.6	270.3	Sandals Resorts	13.7	365.2	Orbitz	9.6	95.0
Starwood	17.0	261.0	Amex	11.5	209.9	Walt Disney	12.3	166.2	AMR Corp	8.1	220.4
AMR Corp	13.0	257.7	Sandals Resorts	10.8	338.7	AMR Corp	12.2	228.4	Carlson	8.0	114.0
NWest Air	11.4	184.1	Am r/BRT	10.7	112.2	Mexico	10.8	206.5	Texas	7.0	118.0
Hyatt	10.6	212.9	USA Intl	10.4	133.5	NWest Air	10.8	113.3	NWest Air	6.4	58.7

MAGAZINE CATEGORIES

Travel	85.8	1826.5	Travel	119.7	2389.0	Travel	127.4	2325.4	Travel	80.6	1512.6
News/Bus Wkly	70.1	311.4	News/Bus Wkly	80.4	348.6	Bimonthly*	84.5	1693.6	Bimonthly*	42.4	1037.7
Bimonthly*	44.8	1276.1	Bimonthly*	63.6	1519.2	Enthusiast	54.7	738.2	News/Bus Wkly	40.2	209.4
Sunday Mags	38.3	365.7	Enthusiast	52.1	862.7	News/Bus Wkly	53.0	290.5	Shelter	32.9	351.1
Shelter	32.8	501.1	Shelter	37.9	478.0	Shelter	40.4	466.4	Sunday Mags	26.1	200.7

MAGAZINES

Travel & Leisure	45.0	844.6	Travel & Leisure	62.6	1015.8	Travel & Leisure	61.2	951.9	Travel & Leisure	35.6	550.4
CN Traveler	30.4	677.5	CN Traveler	34.8	737.3	CN Traveler	35.8	697.9	Travel Holiday	24	519.3
Time	26.6	123.4	Time	33.9	144.3	Travel Holiday	30.4	675.6	Southern Living	21.6	200.0
Southern Living	19.3	249.0	Newsweek	27.2	131.5	Time	25.2	101.7	CN Traveler	21.0	442.9
Newsweek	18.2	99.5	Southern Living	24.2	260.0	Southern Living	25.0	245.8	Newsweek	17.3	81.6
Forbes	17.5	329.5	Travel Holiday	22.3	516.2	Golf Digest	23.5	259.5	Time	16.3	62.3
Golf Digest	16.7	218.1	Forbes	22.0	316.0	Golf	20.6	209.7	Golf	13.1	134.2
BusinessWeek	15.9	188.0	Golf Digest	21.2	257.3	Forbes	18.8	235.7	People	11.8	61.2
Parade	14.5	20.7	Golf	20.1	258.5	NY Times Mag	18.0	303.4	Sunset	11.3	151.1
NY Times Mag	14.3	317.7	BusinessWeek	19.3	204.3	Sunset	15.4	220.6	Midwest	11.2	208.4

* In millions. Source: Competitive Media Reporting. † Year-to-date spending is through September 2002. *Bimonthly category includes bridal and shelter titles.

THE FUTURE

LEADERS

Travel Holiday

► Hachette Filipacchi Magazines' *Travel Holiday* moves up to the No. 2 spot, continuing its steady climb. "While the category has been dropping rapidly, you see *Travel Holiday* just rise up through the ranks," says Opti-media's Mike McHale. He gives props to the magazine's shift in top management and to publisher Jeff Foley, "who knows this category as well as anybody." (One industry player also credits the magazine's deep discounting.) Sandals, Princess

Cruises and Hyatt remain big spenders in the book.

Southern Living

► On track to surpass last year's business, the Southern Progress flagship has really caught on with advertisers. "When business is tough...you have to start looking at regional pockets, where you can get some growth, to supplement national plans," says Garrahy of PGR Media. Three regional titles from Southern Progress—*Southern Living*, *Sunset* and *Midwest*—now are in the top

10. The pros, notes Garrahy, are lower out-of-pocket and easier tracking of results.

Sunset

► Southern Progress' Western-states-themed *Sunset* moves up a notch.

LAGGARDS

Forbes

► The preeminent business biweekly falls out of the top 10 takers of travel ads, joining *BusinessWeek*, which fell off the rankings last year. "In 1997, *Forbes* and *BusinessWeek* were

hitting pretty good numbers.

This reflects that business travel has been hit hardest," says Buchholtz of Veronis. Meanwhile, the biggest travel titles—including *Condé Nast Traveler* and American Express Publishing's *Travel + Leisure*—are on track to meet or best '97 levels.

Golf Digest

► Bad news for Advance Publication's *Golf Digest*, a stalwart in the travel category since 1997. It tumbles out of ranking, while arch rival Time4Media's *Golf* remains.

Starwood has heavily promoted its W Hotel chain in magazines.

Travel magazines as a whole, while showing some signs of weakness, remain on top.

Travel Holiday keeps chugging along, as other players in travel category falter.

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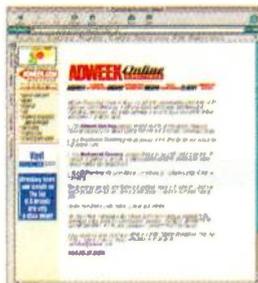
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Cover stories

BY AIMEE DEEKEN

lastWord

DETAILS

Could it be that when it comes to magazines, sometimes it's what's inside that counts? "I was surprised that Johnny Knoxville did as well as he did," says editor Dan Peres. "I did meet him, and came away thinking he's a great guy. But it was also the issue where Bobby Valentine said that he thought

YM

True to form, this teen monthly's biggest success was its sizzling combination of a hot boy in a hot month. "[August is] when kids are buying the most magazines," says editor in chief Christina Kelly. Couple that with the fact that "the best seller of the year is always a boy," and

VANITY FAIR

"People buy magazines like they buy meat," claims *Vanity Fair* editor Graydon Carter. "What sells on the newsstand is weight. And the Hollywood issue was fat." The issue, which included Jennifer Connelly, Kirsten Dunst and Naomi Watts on the cover, is a traditional best-seller. The next month

NEWSWEEK

The Feb. 11 issue, titled "The Bible and the Qur'an," mixed religion—usually a back-of-the-book subject—with current events. "Religion covers do well, and this was relevant to the types of questions people were asking after Sept. 11," says editor Mark Whitaker. Because technology

ELLE

Elle's textbook-size September fall fashion issue had the perfect corresponding fashionista on its cover, Sarah Jessica Parker. Inside, it offered readers a revealing piece on the often-private *Sex and the City* star, including the first photos of her pregnancy. "People are really curious about

PEOPLE

The June 24 issue "hit the trifecta," says *People* managing editor Martha Nelson. "It had Paul McCartney's wedding, J.Lo's split and a package on bachelors with an exclusive on Justin Timberlake talking about his breakup with Britney. It was one of those weeks where we had it all." Laura Bush,

BEST
SELLERS



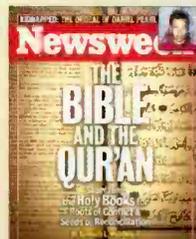
64,192



625,000



439,344



202,700

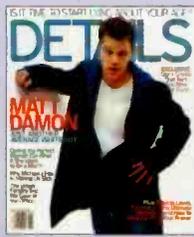


450,000



1,835,000

WORST
SELLERS



64,000



409,560



374,198



89,900



220,000



1,069,276

baseball was ready for an openly gay player. That quote was picked up by a lot of media outlets. God knows that doesn't hurt." As for Matt Damon? "We say it right there on the cover: 'Matt Damon is just another average white guy.' I guess we were right about that."

August was bound to please. When Alexis Bledel from TV's *Gilmore Girls* graced the March issue, *YM* discovered it had "overestimated how popular she was," says Kelly. And while TV covers generally don't attract like music and movies, "I wouldn't completely rule out doing TV covers in the future."

Dunst went solo, and *VF* newsstand sales were down. According to Carter, though, it was as successful as many past covers. "We can have amazing fluctuations on the newsstand, but this year the numbers have varied by 15 percent. It could have been the best in a previous year."

is never a big newsstand player for the title, the weak appeal of its March 25 issue, "Welcome Back to Silicon Valley," was no surprise. "This was a smart idea, but hard to convey on the cover. For the newsstand buyer who has to get a cover in seven seconds, it may have been too complicated."

Sarah," claims editor in chief Roberta Myers. As for January's issue, "We don't blame Heidi [Klum]," says Myers of the model who graced the cover. "It came out in December, and people were still feeling the effects of Sept. 11. Everybody had a bad fourth quarter in 2001."

who was featured on the cover of the Jan. 21 issue, had done well last year with readers, but "maybe we just returned to her too soon," says Nelson. "There may have been some 9/11 hangover." Choosing a cover, she says, "is like drilling for oil, seeing if you can get a gusher. You have to take some risks."

extraordinary



Travel + Leisure

Food & Wine

Departures

T&L Golf

Travel + Leisure Family

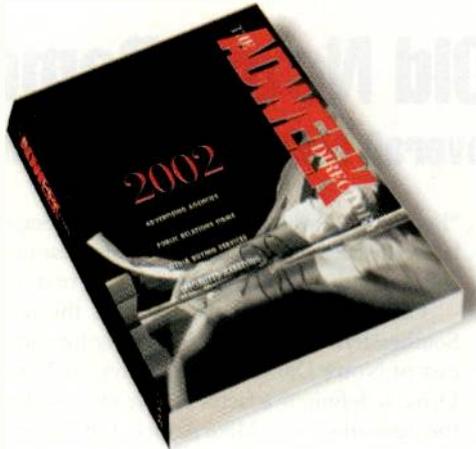
SkyGuide

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 \$2,534,100, Cable TV - \$4,034,400, Spot TV -
 \$42,084,200, Radio - \$4,429,900, Newspapers -
 \$13,606,200, Outdoor -
 \$4,000,000, Other -
Key Personnel:
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 Exec. Vice Pres./Exec. Creative Dir. Denny Haley
 Sr. Vice Pres./Mgmt. Supvr. Thomas F. Keating
 Sr. Vice Pres./Dir., Client Serva. ... Steve Hayes
 Sr. Vice Pres./COO Wesley Crawford
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Fields Served: Automotive, Fast Food/
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 Loans, Food
Employees: 70 **Year Founded:** 1930
2000 Billings: \$99,914,100
2000 Billings By Medium: Network TV -
 \$2,534,100, Cable TV - \$4,034,400, Spot TV -
 \$42,084,200, Radio - \$4,429,900, Newspapers -
 \$13,606,200, Outdoor -
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Cheer, Cheer for Old Notre Dame

Resurgent Fighting Irish help lift overall college football ratings

EVEN IF BACK-FROM-THE-DEAD Notre Dame does not continue its winning ways and go on to capture the national championship, all of the television networks airing college football this fall owe a big thank-you to the success of the Fighting Irish and their new coach, Ty Willingham. While college football ratings were depressed early last season by the events of Sept. 11, the resurgence of Notre Dame (which was undefeated going into this past weekend, following a dismal 5-6 record last year) has been a key factor in drawing more viewers to college grid telecasts overall so far this fall.

Another contributor is the Bowl Championship Series, college football's five-year-old scheme of postseason games designed to produce an undisputed national champion. The BCS format, which is based on teams' rankings in the polls, has put pressure on big-time college programs to schedule more difficult opponents early in the season to win more votes and position themselves to earn an invitation to one of the top bowl games.

Thanks in large part to Notre Dame and the BCS, college football TV ratings are up strongly this season, even though there are more games than ever airing on broadcast and cable. On a typical Saturday afternoon and evening, viewers can choose from about 15 games on the broadcast and cable networks. ESPN is now airing games on four weekday nights, and TBS joined the lineup this fall with a Saturday-night telecast.

Despite the apparent oversupply, five weeks into the season college football ratings were up 35 percent in households on CBS and NBC (which telecasts Notre Dame's home games exclusively) and 6 percent on ABC and ESPN. ABC's telecast of the Florida State-Miami game on

"But for those who bought it as part of packages, this year has really been rewarding. It is the first year in a while that college football is over-delivering. We're in shock."

CBS, whose primary package is the talent-packed Southeastern Conference, is looking forward to its telecast of Notre Dame's visit to Navy on Nov. 9. "Notre Dame is definitely a factor for the increased ratings at all the networks," says Mike Aresco, CBS Sports senior vp of programming. "When Notre Dame does well, it generates interest for college football in general."

Another buyer notes that it's not only Notre Dame fans who are attracted to the team. "There are also lots of people who tune in just to root *against* them," he says.

Of the Fighting Irish's seven games so far, ESPN has aired one, ABC two and NBC four. NBC's Michigan at Notre Dame game on Sept. 21 recorded a 4.7 rating, and the network is averaging a 3.3. NBC and ABC have two more Notre Dame telecasts each, while CBS has one.

Because Notre Dame is not affiliated with any regional conference, the school is able to schedule games against top teams from different parts of the country (plus the military academies, which have broad appeal), driving a more national audience to its telecasts.

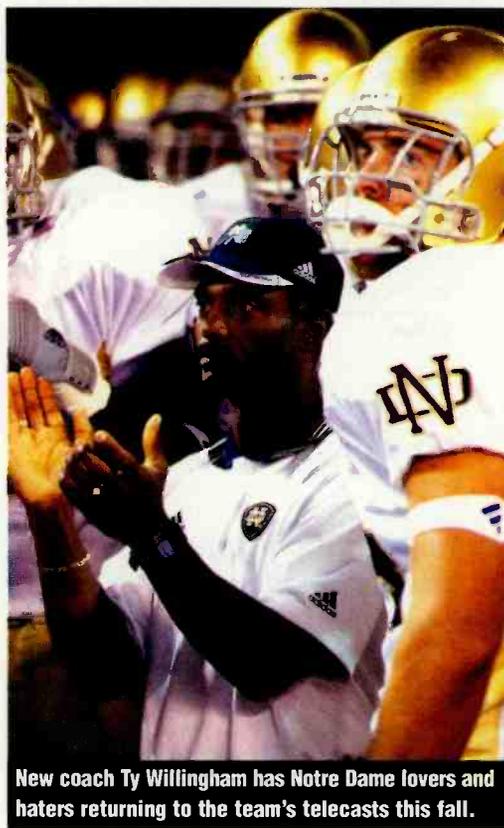
NBC's \$6.4 million annual deal with ND runs through 2004. Despite poor ratings in recent seasons, the network is hoping to extend the relationship. "Under Ty Willingham, this could be the beginning of a long-term era of success for the team," says NBC Sports president Ken Schanzer.

NBC reportedly gets \$50,000 per :30 for its spots on the Notre Dame telecasts. Commercials on CBS sold for about \$30,000 prior to the season, but buyers say the network is getting closer to \$40,000 per :30 in scatter, about the same as ABC is taking in. Prime-time college football spots on ABC are said to be bringing in \$90,000.

Chris Simko, CBS senior vp of sales and marketing, says 80 percent to 85 percent of the network's college football inventory was sold before the season, and that a sizable portion moved in tandem with NFL buys. CBS' new college grid advertisers this season include Wrangler, DuPont, Olympus, Alamo, Fidelity, Kinko's and Gateway.

Inventory at ABC is 90 percent sold for the season, while ESPN games are approaching 85 percent sellout, says Ed Erhardt, president of ESPN/ABC Sports Customer Marketing and Sales. Most of the inventory was sold as part of packages for *Monday Night Football* and *Sunday Night Football* on ABC and ESPN, respectively.

"All sports are back as part of the viewing mix, and college football is part of that," Erhardt says, "It has a passionate fan base. Right now, it feels very American." ■



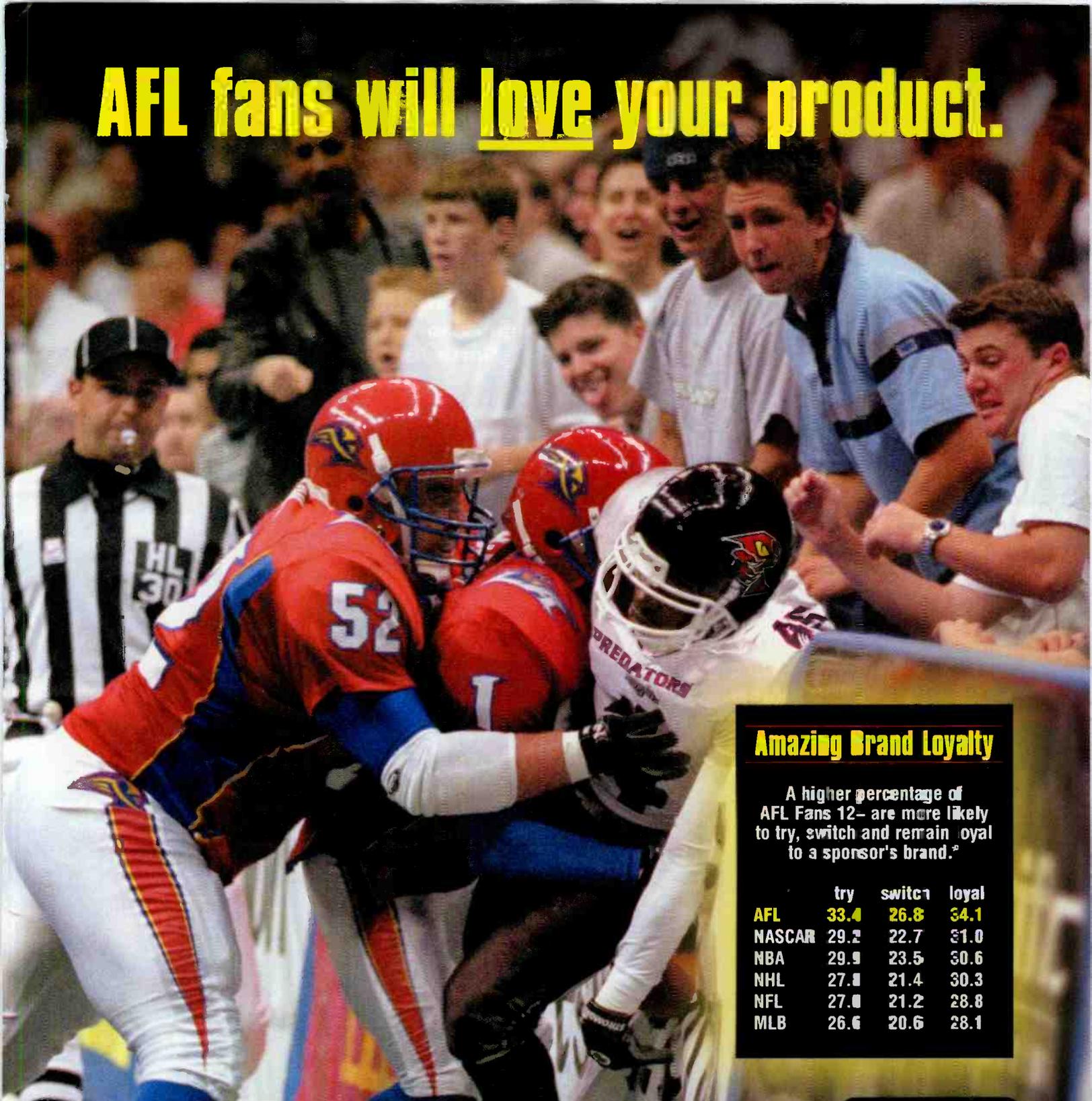
New coach Ty Willingham has Notre Dame lovers and haters returning to the team's telecasts this fall.

Oct. 12 earned a strong 6.7 overnight rating.

Advertisers, many of which took some college football inventory simply to round out their NFL buys, are reaping the benefits of this over-delivery.

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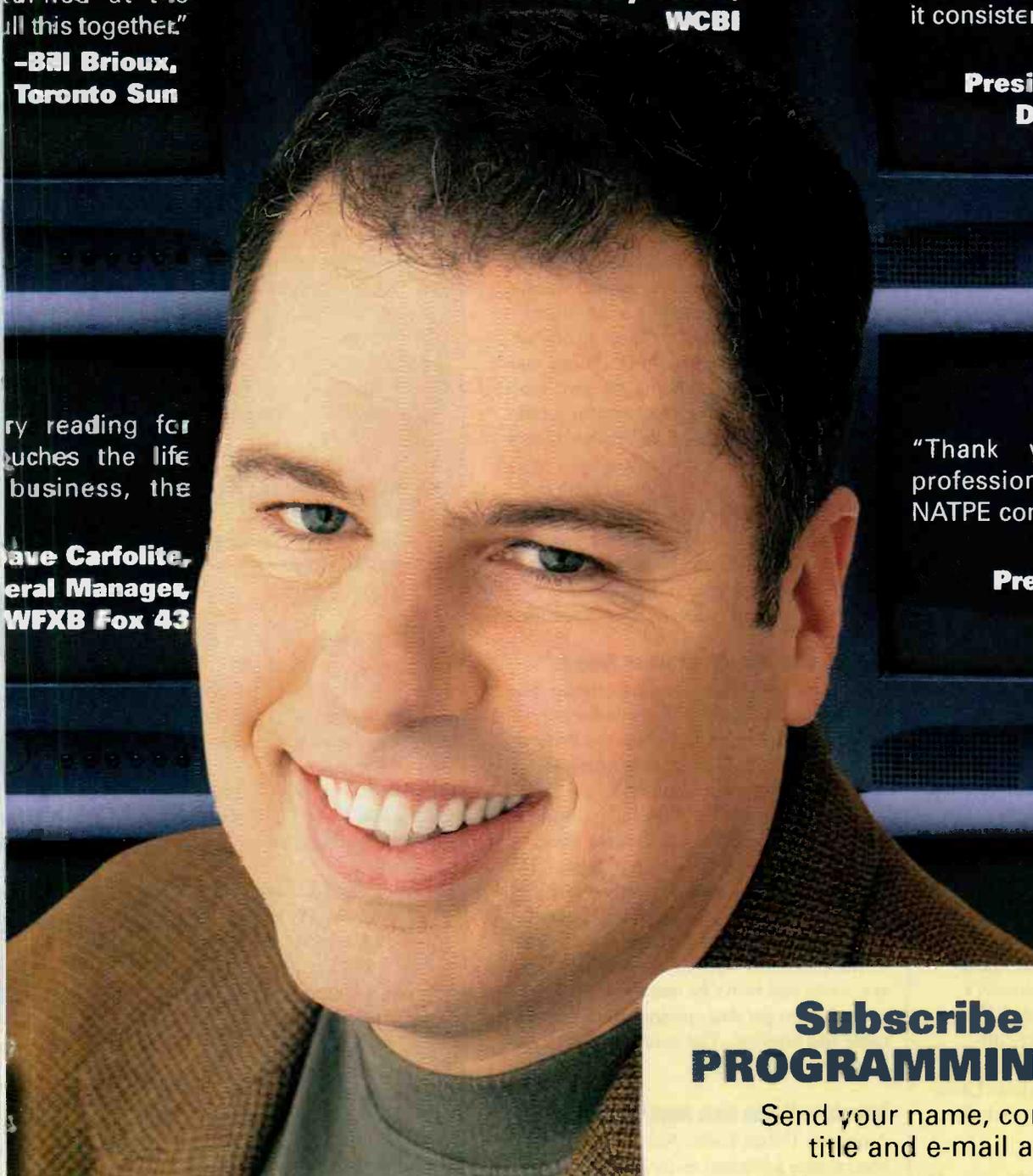
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Survey Gauges Men's Media Usage

Among men ages 25 to 54, African Americans spend the most time overall with media per day, according to a survey by MultiMedia Monitor, a Knowledge Networks/SRI service. The survey shows that their overall use of media is 10 percent higher than the average, with their use of magazines some 40 percent higher than average and their TV time 25 percent higher. Hispanic men in the same age group register near-average use of radio and TV, while their time spent with the Internet, newspapers and magazines is 18 percent to 28 percent below the average. Hispanic men also spend about one-quarter of their overall media time with Spanish-language media. Asian American men register less than 50 percent of average media time listening to radio but show a 50 percent above-average use of the Internet.

Initiative Wins Am. Standard Business

American Standard has consolidated its \$15 million media planning and buying for its U.S. brands with Initiative Media North America. American Standard sells air conditioning systems and services under the Trane and American Standard brands, and bath and kitchen products under the American Standard and Porcher brands. The Richards Group, Dallas, previously handled media planning and buying for the air conditioning products. Carmichael Lynch, Minneapolis, previously did both for the other products.

Tommy Boy Launches Film & TV Unit

Tommy Boy Records has launched a film and TV unit, Tommy Boy Films, aiming to create urban-targeted, ad-supported programming revolving around urban music and the artists behind it. The company's first release is a DVD series entitled *Kung Faux*, half-hour adaptations of the cult-favorite *Kung Fu* movies, presented in a comic-book style. Advertisers include Levis, Target and Showtime, aiming to reach the title's 18-34 male target.

Travel Channel Takes Route to Radio

Through a deal with Discovery Communications, owner of cable's Travel Channel, Matrix Media has launched *Travel Channel Radio* on 20 radio stations, including outlets in Phoenix and Chicago. Content for the

one-hour weekend show is provided by the Travel Channel. Bob Sirott and Marianne Murciana are hosts of the program, which mixes interviews with travel experts and authors, listener call-ins and Travel Channel programming. Chicago-based Matrix Media has produced similar ventures, including *The Pet News* and *Animal Planet Radio*.

Tennis Channel Adds Senior Management

Gearing up for its launch at the end of this year, the Tennis Channel has added four vice presidents to its senior management. Larry Meyers has been named vp of production; Keith Manasco was named vp of operations; Dean Hadaegh was appointed vp of facilities and chief technology officer; and Jill Hisey was named vp of affiliate marketing and strategic planning. Meyers, most recently a coordinating producer for tennis with Fox Sports Net, will be responsible for production of TTC's programming. Manasco was formerly a vp with Financial News Network; Hadaegh was previously business principal and chief technology officer of Venice, Calif.-based S.O.M.A. Inc.; and Hisey was vp of affiliate marketing and strategic planning at ABC Cable Networks.

CEA Appeals FCC Digital Tuner Ruling

The Consumer Electronics Association has asked the U.S. Court of Appeals for the District of Columbia to review the Federal Communications Commission's August order requiring manufacturers to put digital tuners in some sets by 2004 and in most sets by 2007. A decision in CEA's favor could further hamper the transition to digital TV, which has already been delayed several times. The agency says requiring tuners for broadcast reception will remove one hurdle in the transition. The CEA says the tuners are costly and won't be used by most consumers, who get their programming from cable and satellite. The court has yet to set a hearing date.

American Urban Sets New Programming

American Urban Radio Networks will have several new additions to its programming lineup for 2003, including two new daily features. Beginning Dec. 16, the network will add to its sports programming a daily five-minute feature called *Road to Super Sunday*, with color commentary by former Redskins quarterback and Super Bowl XXII

CTAM will present "**Master Course: How Cable Goes to Market**" Oct. 22 at the AOL Time Warner Building in New York. Contact: Tamara Kukla, 703-549-4200.

The Folio:Show, covering the state of the magazine industry and addressing key concerns of editors and publishers, will be held Oct. 28-30 at the Hilton New York. Ed Needham, managing editor of Wenner Media's *Rolling Stone*, will deliver the opening-day luncheon keynote. Contact: 917-981-2937.

American Women in Radio and Television will host a luncheon panel titled, "Scared to meet your media buyers? Don't be left in the dark. Find out what they really want," Oct. 31 at the Yale Club in New York. Contact: Anne Thornton, AWRT vp of programming, 908-413-3799.

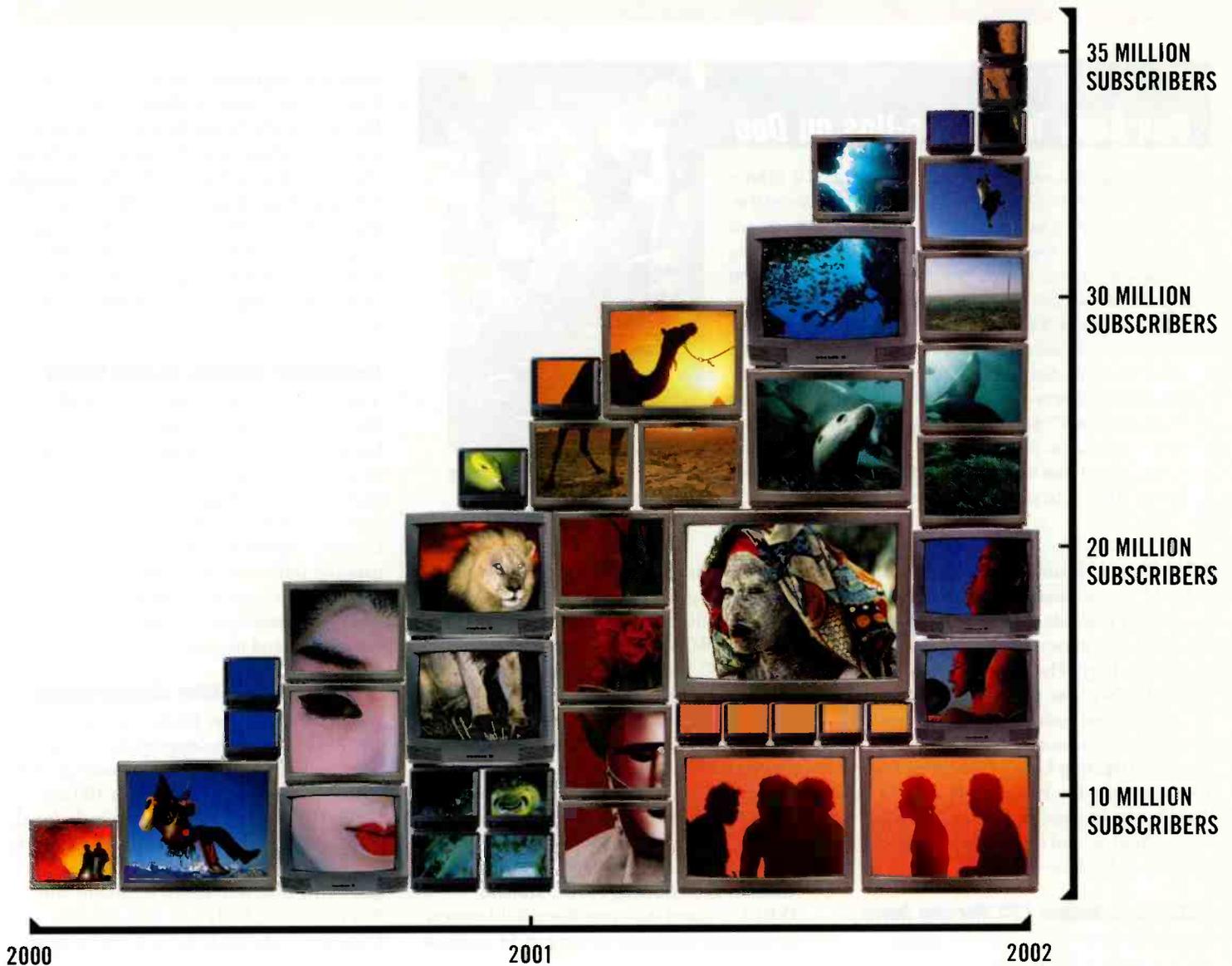
The Association of National Advertisers will present the **Multicultural Marketing Conference** Nov. 3-5 at the Four Seasons Resort in San Francisco. Contact: 212-697-5950.

Delahaye Medialink and the International Association of Business Communicators will present the "**2002 Research and Measurement Conference: Generating a Positive Return on Your PR Investment**" Nov. 7-8 at the Metropolitan Hotel in New York. Contact: 415-544-4700 or visit www.iabc.com/rmconf.

The **American Association of Advertising Agencies** will hold its annual **creative conference** Nov. 13-15 at the Grand Hyatt San Francisco on Union Square. Contact: Michelle James, 212-682-2500.

PricewaterhouseCoopers will present the **Global Entertainment, Media and Communications Summit** Nov. 15 at the Waldorf-Astoria in New York. Contact: 646-394-2413.

IRTS will present a **panel on cross-platform media opportunities** Nov. 19 at the NBC building in New York. Contact: Jim Cronin at 867-6650, ext 305.



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Pax Adds Trivia Pop-Ups on *Doc*

Beginning this week, viewers of the Pax TV drama *Doc*, starring Billy Ray Cyrus, will be given behind-the-scenes factoids about the show during weekly repeat broadcasts, in the form of pop-up video blurbs. The show airs in first run on Sundays at 8 p.m., and the pop-up videos will appear in the encore episodes on Wednesdays at 9 p.m. The graphics will appear at the bottom of the screen and offer information such as what the cast does between takes. "I don't know of any other prime-time show that has attempted this on a regular basis," said Paul Wang, executive vp of Pax. "The producers of the show have been the driving force behind this idea, which offers fans another reason to tune in to our signature show."



Repeats of *Doc* now offer pop-up facts about Cyrus (r.) and crew.

MVP Doug Williams. In January, AURN will add *Money Smarts*, a daily five-minute personal-finance show hosted by Bettie Lee. Featuring the network's Hollywood correspondent, Tanya Hart, host of *Hollywood Live*, AURN is also scheduling a longer list of "Red Carpet Specials," bringing live coverage of every major awards event in America targeting Urban audiences, such as the Grammys, the Emmys, the Lady of Soul Awards, the Essence Awards, the NAACP Image Awards, and the Billboard/AURN R&B and Hip-Hop Awards.

McGinnis to Anchor *CBS Morning News*

Susan McGinnis last week was named anchor of the *CBS Morning News* and a business contributor to *The Early Show*. She will assume her *Morning News* duties on Oct. 28, when the *Early Show* relaunches at 7-9 a.m. with its new anchor team of Harry Smith, Julie Chen, Hannah Storm and Renee Syler. McGinnis, who succeeds Chen as anchor, will appear on the *Morning News* from 4:30 to 5 a.m. each day, with updates at 5:30 a.m., 6:00 a.m. and 6:30 a.m. McGinnis currently does the CBS MarketWatch report for the East Coast editions of *The Early Show*. She will expand her role to report and analyze business stories.

Nielsen Signs Clients for New Meters

Nielsen Media Research, which turned on TV ratings meters in two new markets on Oct. 1, has signed top stations in both markets for the service. In Greenville-Spartanburg-Asheville-Anderson, N.C., the 36th-largest TV market, meter clients

include Charter Cable; WHNS, Meredith Broadcasting's Fox affiliate; WYFF, Hearst-Argyle's NBC affiliate; Sinclair Broadcast Group's ABC affiliate WLOS and WB affiliate WBSC; and Media General's CBS affiliates WNEG and WSPA and UPN affiliate WASV. In Knoxville, Tenn., the 63rd-largest market, the Nielsen meter clients are Comcast Cable; Acme Communications' WB affiliate WBXX; Raycom Communications' Fox affiliate WTNZ; Gray Communications' CBS affiliate WVLT; Young Broadcasting's ABC affiliate WATE; and Gannett Broadcasting's NBC affiliate WBIR. Nielsen now uses household meters to measure television viewing in 54 markets.

RDA to Launch SIPs on Food, Home, Health

The Reader's Digest Association on Nov. 4 will launch a line of digest-sized, special-interest publications on health, food and home, distributing 400,000 copies nationwide to checkout racks at supermarkets and retailers including Target, Wal-Mart and Kmart. The 17 annual "RD Specials" will draw content from sibling magazines *Taste of Home*, *Reader's Digest* and *The Family Handyman*.

Webcasters Denied Relief From Royalties

The U.S. Copyright Office last week denied a motion by webcasters to delay payment of webcast performance royalties, which took effect yesterday and are retroactive three years. Broadcasters including Bon-venture International, Clear Channel Communications, Emmis Communications, Cox Radio and Susquehanna Radio filed the

motion in September asking for a stay until their appeal is heard in district court. Meanwhile, the Small Webcasters Amendment Act, which provides some relief from the royalty fees set in June by the Copyright Office and which passed the House of Representatives two weeks ago, is having a tough time on the Senate side. The bill would give relief to Internet-only webcasters by establishing a fee schedule based on revenue.

Sun-Sentinel Launches Spanish Weekly

The Sun-Sentinel Co., publisher of the *Sun-Sentinel* daily newspaper in Fort Lauderdale, Fla., has launched a Spanish-language newspaper titled *El Sentinel* to serve the area's Hispanic population. In the vein of New York's *Hoy* and Los Angeles' *La Opinión*, the free weekly covers local, national and South and Central American news. The company distributes 60,000 copies on Saturdays to targeted Hispanic households and newspaper racks.

Futbol de Primera Wins Mexican Rights

The Mexican Soccer Federation has awarded the U.S. Spanish-language radio rights to Futbol de Primera, which syndicates soccer programming on more than 100 stations. The four-year agreement includes all games played by the Mexican national team beginning in 2003, including World Cup qualifying matches. Based in Miami and San Francisco, Futbol de Primera also holds the exclusive U.S. radio rights in all languages to several other world-class events, including the 2006 Federation Internationale de Football Association World Cup in Germany, the 2003 and 2005 FIFA Confederations Cup and the 2003 Women's World Cup.

Spaeth to Leave ARF

Jim Spaeth, who has been president of the Advertising Research Foundation since 1996, said last week he would resign his post at the end of April 2003 to pursue entrepreneurial opportunities. During his tenure, Spaeth has been instrumental in growing the organization's membership and its revenue, as well as increasing ARF's global profile. Between now and April, the ARF executive committee and board of directors will conduct a search for a new president who will be responsible for maintaining and building upon the successful strategic repositioning of the ARF. ■

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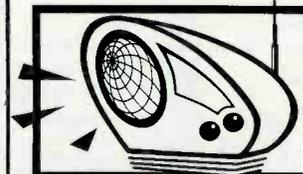
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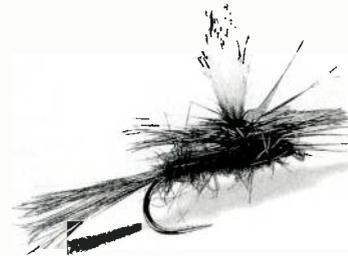
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G4 TV 4 Gamers

Top 10 Selling PC Games

1. *Sims Unleashed*
2. *Unreal Tournament 2K3*
3. *Hitman 2*
4. *No One Lives Forever 2*
5. *Battlefield 1942*
6. *Ghost Recon Island Thunder*
7. *Sims Deluxe*
8. *Earth & Beyond*
9. *Stronghold: Crusader*
10. *NHL 2003*

Top 10 Selling Games

1. *NBA Live 2003 (PS2)*
2. *Hitman 2 (PS2)*
3. *NBA 2K3 (PS2)*
4. *NBA 2K3 (XBox)*
5. *Hitman 2 (XBox)*
6. *Kingdom Hearts (PS2)*
7. *NBA Live 2003 (XBox)*
8. *Hot Pursuit 2 (PS2)*
9. *Time Splitters 2 (PS2)*
10. *Tekken 4 (PS2)*

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The Hollywood Reporter's Box Office

For weekend ending October 13, 2002

THIS WEEK	LAST WEEK	PICTURE	3-DAY WEEKEND GROSS	DAYS IN RELEASE	TOTAL GROSS SALES
1	1	Red Dragon	19,673,545	11	65,296,800
2	2	Sweet Home Alabama	15,788,306	18	86,239,387
3	New	Brown Sugar	11,839,184	4	11,839,184
4	New	The Transporter	10,207,202	4	10,207,202
5	4	My Big Fat Greek Wedding	9,617,589	179	160,118,484
6	3	The Tuxedo	8,017,207	18	38,009,393
7	New	White Oleander	6,275,828	4	6,275,828
8	New	Tuck Everlasting	6,019,089	4	6,019,089
9	New	Knockaround Guys	5,676,852	4	5,676,852
10	5	Barbershop	4,471,984	32	65,895,605

Source: The Hollywood Reporter

Movers

MAGAZINES

Time4 Media has named **Andree de la Garza** sales development director of The Outdoor Co., publisher of *Field & Stream* and *Outdoor Life*. De la Garza had been a director of brand planning at Media.com...Vibe/Spin Ventures has named **Andrea Rosengarten** managing editor of *Vibe*, replacing Laura Silverman. Rosengarten had been managing editor of Fairchild Publications' *Jane* since its launch in 1997...**Lisa Davls** has returned to Time Inc.'s *Health* as deputy editor, after leaving the monthly in 2001 to freelance. Davls first joined the title in 1987. Elsewhere at Time Inc., **John Harvey** has been promoted to marketing director at *Time*, from sales development director. Harvey replaces Taylor Gray, who was upped to associate publisher of marketing.

TELEVISION

Jeff Apodaca was appointed to the new position of vp, integrated sales and marketing for Univision Communications. Based in Los Angeles, Apodaca will be responsible for the integration of local TV sales for Univision and TeleFutura TV stations with Univision Online sales. He was most recently with Excite Network, but he also served previous stints with CBS, NBC and America Online...**Dana McClintock** has been promoted to senior vp of communications for CBS, from vp of communications.

RADIO

Jim Ryan has been named to the new post of vp of Adult Contemporary programming for Clear Channel Communications. Ryan will continue to serve as operations manager and program director of WLTW-FM, the company's top-rated AC station in New York. Elsewhere at Clear Channel, **Steven Kritzman** was named general sales manager of Dance/Rhythmic Top 40-formatted WKTU-FM in New York. He was local sales manager for WLTW.

TV PRODUCTION

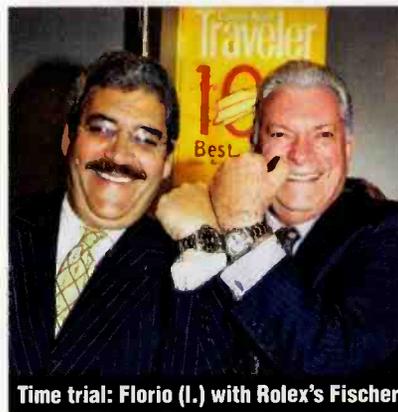
Elaine Bauer-Brooks was named senior vp of programming and development at Twentieth Television. Most recently, she was vp of development and current programming at Imagine Television.

Media Elite

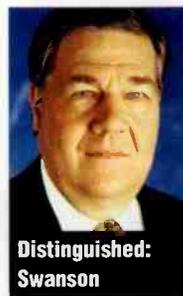
EDITED BY ANNE TORPEY-KEMPH

Quicktakes

CONDÉ NAST TRAVELER'S recent 15th anniversary celebration at the American Museum of Natural History had many highlights, most of them involving CN Publications' gregarious president/CEO, **Steve Florio**: Florio goosing *CNT* founding editor in chief Harry Evans during a photo op; Florio comparing wrists with Walter Fischer, president of Rolex; and Florio getting what he wanted in the silent auction of photos from the *CNT* archives by the likes of Brigitte Lacombe, Annie Leibovitz, David LaChapelle, Raymond Meier and Helmut Newton—no one would bid against him, even after he left, so he ended up with Lacombe's *Swimming With Sharks*...Advertisers and theater people mingled (rather awkwardly, according to one observer) at New York's Ford Center for the Performing Arts at the recent launch party for *Show People*, the new quarterly magazine from Clear Channel Entertainment and Forbes Custom Communications. While big-name Broadway types basked in the glow of photogs' flashes,



Time trial: Florio (l.) with Rolex's Fischer

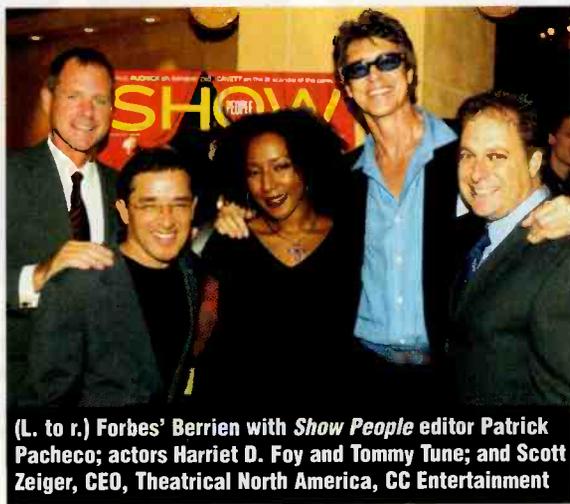


Distinguished: Swanson

Forbes' **Jim Berrien** wasn't quite so comfortable after posing for the umpteenth shot. Advertisers, meanwhile, half-joked with Clear Channel execs about getting good seats for *Hairspray* and *The Producers*, both CC properties. *Show People* is CC's first print venture and the first lifestyle magazine focusing on the art and business of live theater... **Dennis Swanson** has been selected by the John A. Reisenbach Foundation to receive its prestigious Dis-

tinguished Citizen Award, given only once before, in recognition of a career that has prioritized community service and high principles. Swanson, who joined Viacom Inc. this year as COO of its television stations group, is best known for reversing the decline at Chicago's WLS-TV in the 1980s, signing Oprah Winfrey to her show during his tenure there, and leading New York's WNBC a decade later to the top of the market. He'll receive the award at a gala at New York's Rainbow Room on Dec. 10...**Nancy Soriano's** bosses don't mind her being a "couch potato" this week; it's all for the good of the brand. The editor in chief of Hearst Magazines' *Country Living* will be comfortably ensconced amid sofas and chairs in a

booth at the annual furniture show in High Point, N.C., to help promote the new *Country Living* Collection. Soriano's input guided the development of the line, a collaboration between Hearst Brand Development and Lane Furniture...**Mark Seliger**, the legendary lens behind *Rolling Stone* covers from 1987 to the mid-'90s who now shoots for *Vanity Fair*, has joined Web site takegreatpictures.com, the not-for-profit photography resource, as a contributing photographer. Seliger is currently featured on the site in a story about his new photo book on rock musician Lenny Kravitz.



(L. to r.) Forbes' Berrien with *Show People* editor Patrick Pacheco; actors Harriet D. Foy and Tommy Tune; and Scott Zeiger, CEO, Theatrical North America, CC Entertainment

BRUCE GILKAS

Media Elite

Media Dish



To celebrate its 100th anniversary, Meredith Corp. teamed with Rebuilding Together, an organization dedicated to preserving low-income housing, and several execs pitched in to repair a Brooklyn site. (L. to r.) Steve Levinson, group publisher, Better Homes & Gardens Special Interest Publications and *Wood* magazine; Wilkie Bushby, publisher, *Traditional Home*; and Jim Carr, publisher, *Midwest Living*.



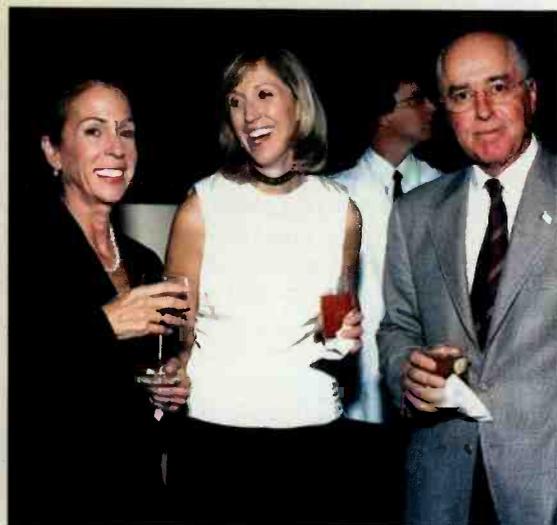
Bill Scott, president of programming for Pax TV (l.), and Marty Lafferty, president of Zoom Culture, with comedian Whoopi Goldberg at a luncheon launching this year's Marshalls Women in Comedy Festival at Tavern on the Green in New York. Pax will air a special on the festival on Thanksgiving night.



At the DKNY store in Manhattan's SoHo district for the kickoff of *Metropolitan Home's* annual SoHo Design Shopping Weekend, (l. to r.) Jill Esterman, luxury products director, *Met Home*; John J. Miller, group publishing director of *Met Home* parent Hachette Filipacchi Media; Patsy Pollack, president, Donna Karan Home; and Anne Triece, vp, group publisher, *Met Home*



Marking the 40th anniversary of the Cuban Missile Crisis, Discovery Channel recently premiered its *Defcon-2* special at the NCTA's hi-def theater in Washington. (L. to r.) Brian Kelly, exec producer, Henninger Productions; Bill Cosmas, executive producer, Discovery Channel; Adrienne Haitz, production assistant, Discovery; Rob Henninger, CEO, Henninger Media Services; and Bill Howard, senior producer, Henninger Productions and producer/director of *Defcon-2*.



At The Greenbrier in West Virginia recently for a weekend of festivities around the opening of the Town & Country Design Showhouse, (l. to r.) Adrian Kahan Leibovitz of Ralph Lauren Home; Sarah Medford, architecture & design director, *T&C*; and Robert Leibovitz

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Survivor: New York

Some publishers this year have decided to tolerate economic pains rather than fold struggling titles

WHILE THE RASH OF MAGAZINE CLOSURES THIS MONTH, INCLUDING TIME INC.'S *SPORTS Illustrated Women* and *Mutual Funds* as well as *Forbes* ASAP, has caught some by surprise, what is really more curious is that more titles have not gone out of business this year. Despite a bruising advertising climate,

continuing woes in circulation and another year of postal rate hikes, publishers so far have shuttered only about 30 consumer magazines. The casualty list includes *Talk*, published by Miramax Films and Hearst; G+J USA Publishing's *HomeStyle*; Reader's Digest Association's *New Choices*; Primedia's *Teen*; and *Yahoo! Internet Life*,

Though Ann Moore, Time Inc. chairman/CEO, last week wrote off *SI Women*, saying the title's need for "significant investment" could not be satisfied in this brutal business climate, the company remains gung-ho about the future of *Business 2.0*—one of the few new economy books still standing. Last year, Time Inc. ac-

will grow faster than the market at large. You have to take a long view, and we do."

One deterrent to pulling the plug on any publication is that the cost of folding can far outweigh the losses the magazine would sustain by staying in business.

"Particularly for publicly held companies, if you've got a property that's losing money but you don't want to have to take a huge write-down, there is an incentive to keep it going longer in the hope that when the market improves, you can sell it," says Rebecca McPheters, president of magazine research firm McPheters & Co. and a former G+J USA exec.

Despite the associated costs, by shuttering *Mutual Funds* and *SI Women* with two months still left in the year, Moore may have sought to extend Time Inc.'s 10-year winning streak of earnings growth.

Meanwhile, G+J USA briefly considered revamping *Rosie* (née *McCall's*) into yet another women's lifestyle magazine after Rosie O'Donnell walked out on the joint venture in Sep-

NOTABLE MAGAZINE CLOSURES IN 2002



1/02.....

■ Tina Brown's *Talk* folds, having lost \$5.5 million since its August 1999 launch.
■ G+J closes 13-year-old *HomeStyle*.

3/02.....

■ RDA shuts bimonthly *New Choices*, for readers over 50.
■ IDG's *Darwin* gets crushed in the tech wreck.



4/02.....

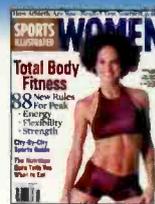
■ Primedia pulls the plug on 44-year old *Teen* just eight months after buying the book from Emap; 40 staffers are laid off.

6/02.....

■ Bauer Publishing announces it will fold *Soap Opera Update* into sister title *Soaps In Depth*.

7/02.....

■ The last issue of Ziff Davis' *Yahoo! Internet Life* hits newsstands. The 500,000-circ title lost \$30 million in its seven years.



10/02.....

■ Time Inc. closes *Mutual Funds*, *SI Women*. ■ *Forbes* ASAP supplement folds. ■ G+J says *Rosie's* last issue will be December.

published by Ziff Davis Media. Last year, about 100 magazines threw in the towel, according to the Magazine Publishers of America.

Back in 1991, at the height of the last recession, closings totaled just 19. Yet magazine guru Samir Husni of the University of Mississippi notes there were about 3,500 magazines a decade ago, compared to some 6,000 now.

At the same time, the rate of magazine launches has slowed since the late '90s, and their chances of surviving beyond one year are just 40 percent, Husni says.

"There are a lot of magazines on death row, but folding a magazine is like killing off one of your children," says Kent Brownridge, senior vp/general manager of Wenner Media. "It's the most painful, unpleasant, horrible thing you can do. Publishers will try renaming it, hyping it... whatever it takes."

quired *Business 2.0* and merged it with its own struggling title, *eCompany Now*. The current *Business 2.0* is soldiering on, with ad pages through November down 16.4 percent from last year to 594, reports the *Mediaweek* Monitor.

In keeping a struggling title afloat, "the conventional wisdom is that there is too much product out there, only a certain amount of advertising is available, and if some magazines die off the remaining magazines will benefit," says Chip Block, vice chairman of USAPubs, a subscription-marketing company. "So there's an inclination to hold out."

As for the technology and financial sectors, the areas of the magazine business hardest hit by the economic slowdown, "I have no question they will come back," says Jack Haire, Time Inc. executive vp. "And when they do, a magazine that's in the center of that universe

tember. But last week, the company decided against doing so. The December issue of *Rosie*, due on newsstands Nov. 12, will be its last.

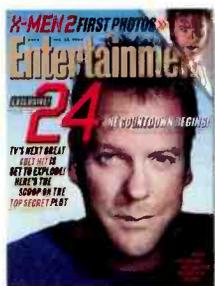
In *Rosie's* case, the uphill battle to convince both advertisers and readers to stay on for another relaunch of the magazine proved insurmountable, even though closing comes at a high cost. G+J USA's projected losses—outlined in its \$100 million breach-of-contract lawsuit against O'Donnell—include \$42 million in subscription liability alone. The company will now also have to dole out severance pay to about 120 employees.

"Ultimately publishers need to have some ray of hope that the editorial premise is going to be embraced," says Alan Jurmain, Lowe & Partners executive vp, director of U.S. media services. "Without that premise, magazines can dry up very quickly." —LG

A New Tune

EW's Tetzeli making his mark

Aside from taking time out to lunch with Hollywood honcho Brian Grazer and chatting up *Charmed* star Rose McGowan, Rick Tetzeli has been busy mapping out his vision of *Entertainment Weekly*. Tetzeli, who joined *EW* as



The new m.e. is cleaning up the cover.

managing editor this month, says readers will soon begin to see some subtle differences, starting with the cover. *EW*'s generally jam-packed covers will carry fewer cover lines and fewer, if any, photos above the logo.

"This is a really photogenic industry," says Tetzeli of *EW*'s

subject matter. "I would like the covers to reflect that more than they have recently." The Oct. 25 issue, fronted by Kiefer Sutherland, is indicative of *EW*'s direction. "It's a very clean, good-looking image that still really sells the magazine," Tetzeli adds.

While Tetzeli has no immediate changes to talk about for front-of-the-book departments and the back-of-book review sections, he plans to add additional music coverage, riffing off of *EW*'s 500,000-circulation music supplement *Listen 2 This*. The insert, which launched in May, targets mostly males in their late 20s and covers edgy rock, metal, hip-hop and some techno. In addition to the supplement, *Listen 2 This* will become a weekly boxed section in *EW*'s music section.

The magazine also will mix in "more general-interest" pieces into the well, Tetzeli says. Most *EW* features traditionally have been pegged to an event, such as a movie release.

In the meantime, *EW* has had some staff turnover. There is no longer an executive editor position; Peter Bonventre became *EW* editorial director, a new position, and Richard Sanders left to join *People* as editor at large. Tetzeli's first hire was fellow *Fortune* vet Henry Goldblatt as an assistant m.e. Tetzeli also will borrow Joel Stein from *Time* to write a weekly back-page humor column on the experiences of the "ordinary man brushing up against celebrity." Stein's column will launch in about two weeks, replacing the tired *Encore* page. —LG

Mediaweek Magazine Monitor

WEEKLIES October 21, 2002

	ISSUE DATE	CURRENT PAGES	ISSUE DATE LAST YEAR	PAGES LAST YEAR	PERCENT CHANGE	YTD PAGES	YTD LAST YEAR	PERCENT CHANGE
NEWS/BUSINESS								
BusinessWeek ^K	21-Oct	98.08	22-Oct	90.28	8.64%	2,545.14	3,072.34	-17.16%
The Economist	12-Oct	51.00	13-Oct	45.00	13.33%	1,804.00	2,116.50	-14.76%
Newsweek ^E X	21-Oct	42.93	22-Oct	50.89	-15.64%	1,442.94	1,352.97	6.65%
The New Republic ⁴	21-Oct	3.66	22-Oct	12.00	-69.50%	307.74	372.63	-17.41%
Time ^E X	21-Oct	55.95	22-Oct	51.04	9.62%	1,764.89	1,732.92	1.84%
U.S. News & World Report	21-Oct	32.61	22-Oct	28.08	16.13%	1,131.76	1,127.89	0.34%
The Weekly Standard	28-Oct	7.00	29-Oct	9.30	-24.73%	365.27	372.85	-2.03%
Category Total		291.23		286.59	1.62%	9,361.74	10,148.10	-7.75%
SPORTS/ENTERTAINMENT/LEISURE								
AutoWeek	21-Oct	21.65	22-Oct	23.06	-6.11%	951.92	1,152.02	-17.37%
Entertainment Weekly [*]	18-Oct	52.32	19-Oct	33.53	56.04%	1,447.64	1,396.15	3.63%
Golf World	18-Oct	11.33	19-Oct	15.50	-26.90%	1,173.21	1,007.84	16.41%
New York ^{4/N}	21-Oct	54.00	22-Oct	66.60	-18.92%	2,008.00	2,181.20	-7.94%
People ^{X/2/S}	21-Oct	85.44	22-Oct	81.78	4.48%	2,849.74	2,883.32	-1.16%
The Sporting News	21-Oct	20.42	22-Oct	11.16	82.97%	599.36	490.27	22.25%
Sports Illustrated	21-Oct	35.69	22-Oct	56.92	-37.30%	1,950.77	1,901.19	2.61%
The New Yorker		NO ISSUE				1,678.50	1,710.57	-1.87%
Time Out New York ^{+T}	16-Oct	87.81	17-Oct	88.69	-0.99%	2,850.35	2,800.98	1.76%
TV Guide	19-Oct	46.22	20-Oct	62.04	-25.50%	1,889.83	2,242.05	-15.71%
Us Weekly ^{4/DD}		NO ISSUE	22-Oct	36.90	N.A.	817.83	772.42	5.68%
Category Total		414.88		476.18	-12.87%	18,217.15	18,538.01	-1.73%
SUNDAY MAGAZINES								
American Profile	20-Oct	11.55	21-Oct	8.99	28.48%	365.48	352.24	3.76%
Parade	20-Oct	11.03	21-Oct	14.48	-23.83%	515.47	486.39	5.58%
USA Weekend	20-Oct	13.31	21-Oct	8.92	49.22%	492.42	464.72	5.56%
Category Total		35.89		32.39	10.81%	1,373.37	1,303.35	5.57%
TOTALS		742.00		795.16	-6.68%	28,952.26	29,989.46	-3.46%

DD=double issue last year; E=estimated page counts; N=includes NY Shops special, 22.6 pages in 2002; S=includes 2001 subscriber special of 4.54 pages; T=YTDs includes two specials; X=YTD 2001 includes an out-of-cycle issue; 2=two fewer issues in 2002 than in 2001; 4=four fewer issues in 2002; +=one more issue in 2002

BIWEEKLIES October 21, 2002

	ISSUE DATE	CURRENT PAGES	ISSUE DATE LAST YEAR	PAGES LAST YEAR	PERCENT CHANGE	YTD PAGES	YTD LAST YEAR	PERCENT CHANGE
BUSINESS/ENTERTAINMENT								
ESPN The Magazine	28-Oct	59.32	29-Oct	37.11	59.85%	1,165.50	1,072.86	8.63%
Forbes ²	14-Oct	166.00	15-Oct	55.17	200.89%	2,453.67	3,033.22	-19.11%
Fortune	28-Oct	143.52	29-Oct	140.18	2.38%	2,632.92	3,319.31	-20.68%
National Review	11-Nov	18.75	5-Nov	23.83	-21.33%	320.28	402.17	-20.36%
Rolling Stone	31-Oct	112.00	25-Oct	78.51	42.66%	1,234.20	1,204.65	2.45%
CATEGORY TOTAL		499.59		334.80	49.22%	7,806.57	9,032.21	-13.57%

2=two fewer issues in 2002 than in 2001

CHARTS COMPILED BY AIMEE DEEKEN

Small Pleasures

New postal discounts weighed

The U. S. Postal Service will hold meetings next week to determine whether a proposed two-year experimental discount for small-circulation magazines can be expedited and put into place by early 2003. The savings, which will be up to 5 percent in postage, are similar to so-called work-sharing discounts already enjoyed by large mailers such as Time Inc. and Condé Nast. Qualifying small publications are those under 150,000 circulation; start-ups; and niche publications that could benefit from the discounts, such as *The New Republic* (85,000 circ) and Primedia's *Fly Fisherman* (127,000).

Small publishers will be encouraged to combine different publications or print runs on

more efficient pallets (a wooden base upon which bundles of magazines are stacked, wrapped and shipped by truck to a postal service facility) as opposed to sacks, which are more costly to handle. If publishers take advantage of the work-share discounts, other lucrative incentives could also kick in, including drop-ship discounts (which reward publishers' use of private transportation companies that ship magazines on pallets).

"We are encouraging the entire industry to move to more work-sharing and to leave the Postal Service to do the parts of it they are better at, which we believe to be delivery to the home," says Rita Cohen, senior vp/legislative and regulatory policy for the Magazine Publishers of America.

The discounts would have to be approved by the Postal Rate Commission. —LG

Media Person

BY LEWIS GROSSBERGER



Soprano Singing Flat?

NUMEROUS CONTROVERSIES ROIL THE WORLD OF MEDIA/

entertainment/nuclear weaponry this week, so Media Person will lose no time in manipulating your thinking on the three most crucial matters. Is *The Sopranos* as good as ever this season or does it, in the sophisticated parlance of our time, suck?

This once-taboo question has begun to pop up in the back pages of some of our major newspapers, even as the zeitgeist-impaired still happily discover the hit show's existence.

"Unlike past seasons," muses *New York Post* TV critic Adam Buckman, "something seems to be terribly off this year." In fact, he writes of watching the anticlimactic, sick-horse episode, "suddenly [the show] was monotonous, aimless and deadly dull." His solution? "What's needed to revive the show is for someone to get whacked—fast, and as violently as possible."

Unironically, on the same day Buckman's exhortation to mayhem appeared, so did a piece by *New York Daily News* critic David Bianculli admiring the series' rich, literary qualities. Though the show in which tough Tony rushes to the track in the middle of the night to tenderly nurse a sick racehorse may not have "made for an especially gripping episode," Bianculli apologized, "*The Sopranos* has to be read and enjoyed like a novel, not a short story." Be patient, he admonished anxious viewers. Seeds are being quietly sown that will pay off in the end. The FBI has turned Adriana. (Or has it?) Former comic-relief gofer Bobby "Bacala" is emerging as a formidable mob guy, as well as a lovely human being. Carmela's excited about intermediate-term bond funds.

Obviously, Bianculli has detected the grumbling around the hipper water coolers and is concerned that Buckman-like thinking may prevail. So what is the proper attitude for an ordinary American to strike when even the experts split? In Media Person's view, which after all is the only view worth remembering, now is not the time to question *The Sopranos*. The nation faces nuclear crises abroad and snipers at home. Now that religion, politics,

network television and sex have all failed us, there are few certainties to keep us from slipping into the void. It basically comes down to this: Either we as a nation keep our faith in *The Sopranos*, or we perish.

Was it wrong of Geraldo Rivera to sign autographs near the site of a sniper shooting?

Alternately, this question may also be framed as follows: Why is it that just when we're on the verge of forgetting Geraldo's existence, he always manages to remind us how much we regret his existence?

This time the Fox News Channel correspondent went to Fredericksburg, Va., stood on the spot where a man was killed and did one of his inimitable on-air turns, making certain his viewers understood that he highly disapproved of the sniper's activities. Geraldo then repaired to a Hooters restaurant about 50

nores a more important reality, which is that Geraldo exists in order to be laughed at by exemplifying all that is ridiculous in the human race. He is a national treasure and should be coddled, cosseted and encouraged.

Do we really need journalism schools?

With his impeccable sense of dramatic timing, Media Person has saved the most exciting topic for last. This controversy began when the president of Columbia University canceled his school's search for a new J-school dean and instead ordered a total rethink of the whole concept of journalism school by a panel of people with impeccably credentialed brains.

Journalists began weighing in on the matter in all the journalist weighing-in stations. Many of them stated that J-schools are completely useless, offering as proof the fact that they themselves achieved greatness without attending one. Some complained that they had indeed attended such institutions but were taught too much theory and not enough practical nuts-and-bolts technique, while others grouched that they were trained only in writing and reporting without the necessary philo-

It basically comes down to this: Either we as a nation keep our faith in *The Sopranos*, or we perish.

yards away, where he proceeded to sign his name with a felt-tip pen across the rear ends of hot-pants-wearing Hooters' waitresses amid what has been described as a jovial atmosphere. Some of the Hooters patrons suggested to reporters that this was in poor taste, although Chief Moose unaccountably failed to mention the incident in any of his press briefings. (Media Person will go to any length just to be able to write the words "Chief Moose.")

Of course, to accuse Geraldo of bad taste is to accuse Satan of encouraging sin, as well as pretending that we didn't abandon the entire concept of taste long ago. But this truth ig-

sophical or ethical framework.

As a proud graduate of one of the nation's noblest journalism schools (though it is now known as a "communications center"), Media Person must and will rise to its defense. One point above all must never be forgotten: Journalism courses are (or at least were in MP's day) a lot easier than most other courses and enabled Media Person to achieve a higher grade point average, as well as freeing his mind for all-important extracurricular activities, such as watching TV. This factor alone justifies the J-school experience. Long may it live! ■

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