

Fog of war engulfs affiliation battles

To-date tally: Fox upgrades in 16 markets, introduces affils in 7; ABC goes UHF in 9

By Julie A. Zier

Networks and station owners have quelled most of the affiliation battles that erupted six months ago, but the question remains: Who won the war?

The answer differs depending on whose shoes you're marching in.

"The winners are stations that remained affiliates of the Big Three," NBC TV Network President Neil Braun says. Of the 68 stations expected to change affiliations, 21 will move from a traditional network to Fox.

CBS President of Affiliate Relations Tony Malara contends that viewers are taking the brunt of the fighting. "There can't be any positive effect to changing the way 30% of viewers [watch TV]," he says.

Everyone wins in the end, according to Cox Broadcasting President Nick Trigony. New affiliation agreements mean fewer network programs are preempted and stations get greater compensation in return. Cox resigned with ABC in the turbulent Atlanta market.

Fox is the only challenger willing to claim victory. Ken Solomon, executive vice president of network distribution, calls on the October Nielsen ratings for Kansas City, Mo., and Cleveland. Both markets, which debuted with the switches in October, show marked increases in Fox's audience from last year.

"It's hard not to feel like a winner," Solomon says. "The other networks are flat or down. We are up in every demo."

According to the following charts, Fox is upgrading to VHF's in 16 markets and will introduce affiliates into seven. Meanwhile, the three major networks will downgrade to UHF's in 19 markets. ABC suffers the most casualties, with nine affiliates sliding; NBC and CBS follow with five moves each.

"From a network perspective, Fox has upped the cost of doing business," Braun says. "They've made the playing field more competitive and more expensive."

Most of the industry perceives Fox to be on the offense and the networks

on the defense, Solomon says. He explains that Fox was created to compete in the three-net marketplace. "We do it with unconventional means and conventional programming, like the NFL," he says.

Whether there is a winner or loser in the affiliation wars remains unclear, but the nature of the battle undeniably has been altered.

"I don't think these markets are it," Malara predicts. "As long as there are stations out there that have not signed long-term affiliation agreements, there's still an opportunity for mischief."

The following charts monitor the unprecedented 37-market upheaval that began in late May with the blanket Fox-New World deal. That unexpected union prompted similar alliances between other group owners and networks including Scripps Howard-ABC, Gaylord-CBS and Group W-CBS. Strategic partnerships developed between Tribune and a minority group, Fox and Savoy, and Fox and Blackstar.

AFFILIATION SCORECARD

The agreement between Fox Television and New World Communications in May set off a chain of affiliation switches and other network station deals, including CBS-Group W and ABC-Hearst. These charts show where things stand in markets affected.

TV-13 indicates United Franchising affiliate

WB indicates former Group W network affiliate; Station for sale

Market has the option to buy Argyle station; *Switched dial position

| AUSTIN, TEX. | | Now | To Be | Ownership |
|--------------|-------|-----|-------|-------------------|
| KBVO | ch 42 | FOX | CBS | Granite B'casting |
| KTBC | ch 7 | CBS | FOX | Argyle* |
| KVUE | ch 24 | ABC | ABC | Gannett |
| KXAN | ch 36 | NBC | NBC | LJN Broadcasting |

| ATLANTA | | Now | To Be | Ownership |
|---------|-------|------|-------|--------------------|
| WAGA | ch 5 | CBS | FOX | New World |
| WATL | ch 36 | FOX | WB | Qwest Broadcasting |
| WGNX | ch 46 | Ind. | CBS | Tribune |
| WSB | ch 2 | ABC | ABC | Cox Communications |
| WVEU | ch 69 | Ind. | ??? | CBS |
| WXIA | ch 11 | NBC | NBC | Gannett |

| BALTIMORE | | Now | To Be | Ownership |
|-----------|-------|------|-------|-------------------|
| WBAL | ch 11 | CBS | NBC | Hearst Corp. |
| WBFF | ch 45 | FOX | FOX | Sinclair |
| WHSW | ch 24 | Ind. | Ind. | Silver King Comm. |
| WJZ | ch 13 | ABC | CBS | Group W |
| WMAR | ch 2 | NBC | ABC | Scripps Howard |
| WNUV | ch 54 | Ind. | U/P | ABRY Comm. |