AGENDA-SETTING AND THE LOCAL TELEVISION MANAGER

An abstract of a thesis by
Jeffrey Neal-Lunsford
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Drake University
Advisor: Dr. Michael Cheney

The problem. The purpose of this study is to determine whether the professional agendas of local television managers are influenced by a medium; in this case, Broadcasting magazine.

Procedure. First, the agenda of Broadcasting was determined by a content analysis of fifty-two issues (one year's run) of the magazine. Then, the agenda of the television managers was determined by sending a survey based on the content of Broadcasting to managers across the country and comparing their responses to the content analysis of the magazine.

Findings. It was determined that the managers of commercial stations had an agenda very similar to that of Broadcasting, while the managers of noncommercial stations did not.

Conclusions. Since it is unlikely that the commercial managers all arrived at a similar agenda by accident, the indications are that the commercial managers' agenda is set to some degree by the magazine. This does not hold true for the managers of noncommercial stations.

Recommendations. Since this study was unique in that it utilized the concept of agenda-setting outside of the political arena, there is a need for more research to verify these conclusions.
AGENDA-SETTING AND THE LOCAL TELEVISION MANAGER

A Thesis
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The School of Journalism and Mass Communication
Drake University

In Partial Fulfillment
of the Requirements for the Degree
Master of Arts

by
Jeffrey Neal-Lunsford
June 1988
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Jeffrey Neal-Lunsford

Approved by Committee:

Michael R. Cheney
Chair

Dean of the School of Journalism and
Mass Communication
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CHAPTER ONE

INTRODUCTION TO THE LOCAL MANAGER

Managing the local television station

The medium of television has been the subject of thousands of books, magazine articles, research projects and the like. Most of what has been written has focused on broad issues, including such favorite topics as the effects of televised violence on children, the types and rationale of programing scheduled by the three major networks, and the role of television in contemporary society. These are all important and worthwhile topics for study, but for the most part such "macro" studies jump directly from the source of the programing to the recipient watching at home. An important middle link is overlooked.

Except for the small segment of the television audience that receives network or syndicated programing directly through the use of home satellite receivers, television comes into the home by way of network-affiliated, independent, and noncommercial stations. These local stations play an important role in the television arena, a role which deserves closer scrutiny.

Without their local affiliates the networks would have
no place to show their programs. Similarly, program syndicators rely heavily on independent stations to buy their programs. As a result, local television stations do have a measure of influence in the kinds of programs Americans watch. In addition, these local stations originate their own programming, shows designed especially for the local audience. Observed in this way, local stations are not merely passive radiators of the work of others, but are active participants in the television process.

The programs that reach the home are but the final link of a long chain. Even on the local level there are many interconnected factors involved in creating, selecting and airing a schedule of programs. For a local station to fulfill its objectives, these factors must be dealt with on a day-to-day basis. A list\(^1\) of just some of the concerns facing the local stations would include:

1. Program sources- Network affiliates receive most, but not all, of their programming from the networks. Certain time periods, such as prime access, must be filled with syndicated or locally originated shows. For independent stations program choices are even more critical, since they have no network supplier to fill their broadcast day. Noncommercial stations may fall somewhere in between these extremes, filling their schedules with a mixture of network-
and locally-produced programs. For commercial stations, and to a lesser extent noncommercial stations, the goal is to select and/or create programming that will deliver desired audience numbers and meet community service standards.

2. Technology - Local television has felt the impact of new technology in the past few years and will continue to do so. The range of equipment available to a local station has increased, raising new questions that must be answered. Should a station invest in a satellite downlink to receive its programming, or should it stick with reliable, but increasingly expensive, land lines and microwave links? Is the greater sound quality of stereo worth the cost of installing the additional equipment required for the process?

3. Legal affairs - The courts have struck down the must-carry rules requiring cable systems to carry all broadcast signals within a certain radius. Will the local station have to negotiate carriage with local cable systems? Or, in a different legal area, what will happen if a station is served with a libel suit?

4. Advertising - Advertising is responsible for the vast majority of a commercial station's revenues but raises problems which must be addressed. Should a station make use of free, but unproven, barter-syndication programs or pay increasingly expensive fees to syndicators? A decision must also be made on whether to allow advertisers to air
fifteen-second commercials, which may unduly clutter the station's schedule.

5. News- The news department of a station has its own unique needs. A decision must be made on the merits of investing in satellite news gathering equipment, with its attendant expense and the necessity of hiring extra staff.8 Another area of concern is the journalistic policies of the newsroom and how they relate to the problems encountered by a station's reporters, such as overcoming the roadblocks set up by different levels of government in order to obtain a story.

A television station is a complex vehicle with many separate departments, such as news, engineering, production and programing. In the average station each of these departments is overseen by a manager: a news director responsible for news, a chief engineer responsible for engineering, and so on. In order for a local station to function effectively and profitably there must be one focal point where final decisions are made and a station's overall direction decided upon. This responsibility lies with the local television manager. He may be called a general manager, station manager or vice president, but regardless of his title, it is the local television manager who must coordinate the departmental managers and bring together the divergent forces within a station in order to shape the
final product shown to the viewer at home.

On the network level, some top executives have become near-celebrities. Grant Tinker and Fred Silverman are two examples of executives who have received a great amount of media attention. The local television manager, in contrast, works in an atmosphere of obscurity. His management philosophies and decisions receive little public attention. There are few books available for the broadcast student or interested viewer to study the activities of the local television manager.

This thesis seeks to investigate the decision-making processes of the local manager. How does he arrive at his decisions? What are his priorities? Where does he get his information? These are just a few of the questions that will be asked.

The intent of this study

This project has two purposes. First, an examination will be made of the content of Broadcasting, a news magazine widely read by local managers. This will be done by conducting a content analysis of the magazine. Once that goal has been attained, a second purpose will be to learn more about the management activities of the local television managers. This will be accomplished through the means of a survey. From this information, an agenda of priorities will be constructed for both Broadcasting and the managers.
The agendas developed from this process will be tested by using the concept of agenda-setting, a theory which is explained in detail in chapter 2. The utilization of this theory should help in answering the question that forms the focal point of this project: Are the managers' professional activities, or agendas, determined by the content of Broadcasting magazine?
CHAPTER TWO

AGENDA-SETTING THEORY

The background of agenda-setting

Agenda-setting, a relatively new concept to enter the study of communication effects, was brought to the attention of mass communication researchers by Maxwell McCombs and Donald Shaw.¹ It is described as a phenomenon whereby certain groups, such as politicians or the media, can emphasize a certain issue or group of issues to such an extent that the public is caused to place a similar emphasis on the subject. While this idea is not entirely new, with several previous investigators exploring similar ground,² it is McCombs and Shaw who have contributed most to demonstrating the existence of agenda-setting.

Agenda-setting differs from other media effect theories in that it does not look for changes of opinion, attitude, action or knowledge. The theory underlying agenda-setting instead holds that a group can influence a public into giving an idea more importance than it deserves by replacing that public's agenda with its own.³ Accusations of just such an effect have been made many times against the news media, with critics charging that news personnel warp the
proper priorities of society by giving undue attention to
the news items that they believe should take precedence.

ocusing on the attacks of critics who see the media as too
owerful, Burns observes:

Power has many forms. The critics of newspapers and
broadcasting see their power as lying in controlling the
agenda, in their ability to select certain issues for
discussion and decision and to ignore others, or to
treat them as non-existent... 4

This argument is balanced by those who believe that the
ews media are simply being responsive to the demands of
their audience, thus giving the agenda-setting function to
he public. Said Frank Stanton, president of CBS, "What
he media do is hold up a mirror to society and to try and
port it as faithfully as possible." 5

The studies conducted thus far on agenda-setting have
en concerned with the effects of the media on political
ampaigns. One of the earliest studies, conducted in
agland in 1959 by Trenaman and McQuail, examined the impact
he media on voters during the General Election. Their
indings indicated that while many voters did not actively
ek out media information regarding campaign issues and
ididates, the mere exposure to the media increased their
areness of these topics. The researchers found that those
oters with the greatest exposure to the mass media were the
ost likely to know where a candidate stood on different
issues. Trenaman and McQuail did not, however, conclude that any agenda-setting function of the media existed; they merely pointed out the effects of exposure to the media.

In a 1969 study of political campaigns Lang and Lang came a step closer to identifying agenda-setting. Even though they were unable to obtain positive evidence of an agenda-setting function of the media, they observed:

The mass media force attention to certain issues. They build up public images of political figures. They are constantly presenting objects suggesting what individuals in the mass should think about, know about, have feelings about.

At the same time that Lang and Lang made these comments, there were those in the political arena who had reached the same conclusion, that the media had gained an inordinate amount of influence over the public. One such proponent of this belief was former Vice President Spiro Agnew, who made the influence of the media the subject of one of his most famous speeches. Delivered in Des Moines, Iowa, in 1969, Agnew leveled a scathing blast at the media and the practices of news organizations.

The Vice President focused his attack on what he considered the source of the influence, or agenda-setting; the producers and anchormen of the network newscasts. One section of Agnew's speech stands out as a good example of the arguments made by those critics who believed that the
media were guilty of setting the public's agenda. Said Agnew:

...these commentators and producers live and work in the geographical and intellectual confines of Washington D.C. and New York City, the latter of which James Reston terms the 'most unrepresentative community in the United States.' Both communities bask in their own provincialism, their own parochialism. We can deduce that these men read the same newspapers, and draw their political and social views from the same sources. Worse, they talk constantly to each other, thereby providing artificial reinforcement to their shared viewpoints. 8

While Agnew's comments were based on his own emotional views rather than objective research, he might well be considered one of the fathers of agenda-setting, since his remarks were made before McCombs and Shaw first used the expression to describe their findings on political campaigns.

McCombs and Shaw first developed their concept of agenda-setting during their study of the interaction between voters and the media in Chapel Hill, North Carolina. Their stated hypothesis was that "the news media set the agenda for each political campaign, influencing the salience of attitudes toward the political issues." 9 The researchers tested their hypothesis by interviewing one hundred residents of Chapel Hill, limiting the respondents to those who had not yet definitely decided how to vote. Their presumption was that such respondents would be most susceptible to information on the political campaign.
 Concurrently with the interviews, a content analysis was conducted on the media serving the area, including newspapers, television, news magazines, and the editorial pages of newspapers and news magazines. The media content was divided into fifteen categories representing key issues such as foreign policy, law and order, and the candidates running for office. The content of the media coverage was also graded into levels of "major" and "minor" emphasis.

A summary of their findings shows that McCombs and Shaw found a significant correlation between what the undecided voters perceived to be the key issues of the campaign and the prominence of those issues in the media's presentations. The correlations were not the same for all types of media. Among the major items of emphasis, newspapers most nearly correlated with the voters, followed closely by television and then magazines. Despite the differences, the findings indicate that the campaign issues emphasized by the media were nearly the same as the issues seen as most important by the public.

These findings, while significant, did not prove the existence of agenda-setting, but they did indicate the plausibility of such a condition. The hypothesis put forth by McCombs and Shaw so intrigued the research community that further agenda-setting studies were instituted by others studying media effects, so much so that the original report has become one of the most frequently cited articles
in mass communication research.\textsuperscript{10}

McCombs and Shaw have emphasized that "the saliency of issues in the mass media influences the saliency of issues among the public."\textsuperscript{11} As a result, the majority of agenda-setting studies have focused on issues, especially their prominence and the frequency of their appearance in the media.\textsuperscript{12} More recent studies have attempted to clarify this relationship by measuring the strength of media emphasis and issue salience over different periods of time.\textsuperscript{13}

This emphasis on issues and on the perception of issues by the public is used by media effects researchers to produce evidence of "patterning and consistency in the media version of the world."\textsuperscript{14} The belief of those engaged in such research is that a consonant view of reality among different media can induce the same view in the public exposed to such media. This results in the process whereby the public accepts the agenda presented by the media. It must be emphasized, however, the agenda-setting researchers do not conclude that the media tell the public what to think--the effect under study here is that the media tell the public what to think about.

Agenda-setting and the local television manager

The previous research efforts related to agenda-setting have focused, for the most part, on the political arena--
they have sought to measure the influence of several forms of media in terms of voter preference for a particular political party or candidate. This project departs from the political sphere and attempts to discover whether agenda-setting exists under different conditions. More precisely, what is sought is the effect of a single medium, in this case Broadcasting magazine, on the agenda of the managers of local television stations.

This project is a pilot study in that it differs from the initial agenda-setting study conducted by McCombs and Shaw, as well as those who have followed in their stead. They measured the agenda-setting function of several media, including newspapers, television, and magazines. Here, there is only one appropriate medium, the magazine. The local television manager receives little information of professional interest from newspapers or television. This, unfortunately, negates any comparisons between different media.

Compared to the aforementioned efforts in agenda-setting research, this project has built-in limiting factors, a necessary consequence of studying one select group as opposed to a more heterogeneous group such as the voting public. Limitations aside, the hypothesis put forth by McCombs and Shaw will be adapted for the purposes of this project and tested in order to discover whether Broadcasting magazine exerts an agenda-setting function
with local television managers.

In order to determine whether Broadcasting imposes any kind of agenda on the local managers, a study similar to that conducted by McCombs and Shaw will be undertaken. The agenda of Broadcasting will be established by a content analysis of the magazine. Local television managers will be interviewed by means of a survey, with their responses determining their agenda. Comparing the two agendas will determine the correlation between the managers and the magazine. If the agendas are similar, a case may be made for Broadcasting's role as an agenda-setter. If the agendas differ markedly, it may be determined that Broadcasting has no agenda-setting function.

If the concept of agenda-setting does exist between the media and their consumers, some relationship should emerge between the editors of Broadcasting and its readers. If former Vice President Agnew is correct in his assumptions, it may be found that the magazine's editors, living and working in the confines of Washington D.C., present an unrealistic agenda to their readers scattered across the country. There is no doubt that Broadcasting is a major source of information for the elite group of men and women who manage the nation's television stations. Television historian Erik Barnouw once described the magazine in this way:

The weekly issues of Broadcasting provided the fullest
available account of events in the industry, with emphasis on business aspects. The magazine was indispensable to any student of broadcasting... A station manager working his way through [it] could get a liberal education."15

That Broadcasting is well-read by television managers is not the main point of this project. What is to be discovered is what the managers do with the magazine's content once they have read it. Do they take Broadcasting's agenda as their own, or do they simply process the information and act on their own agendas?
CHAPTER THREE

CONTENT ANALYSIS METHODOLOGY AND RESULTS

Introduction

A question may be raised as to the reasons for examining the contents of *Broadcasting* magazine, as opposed to an examination of one of the other numerous trade journals of the electronic media. The primary reason for the selection of this magazine is its status, as it is regarded by many as the "bible" of the broadcast media. *Broadcasting* is not only one of the oldest periodicals in its field (founded in 1931), it is also one of the largest, with a circulation exceeding 40,000.\(^1\) Over the years *Broadcasting* has reached a level of esteem comparable to that of *Billboard* magazine, long considered the bible of the music industry. Because of *Broadcasting*'s reputation and influence, and its high readership among local station executives, it is the clear choice for the purposes of this thesis.

Methodology of the content analysis

In order to establish the agenda of *Broadcasting*'s editors, one year's press (fifty-two issues) of the magazine
has been subjected to a content analysis, beginning with the issue of October 28, 1985, and ending with the issue of October 20, 1986. Each article in the magazine was read, and based on its subject matter, placed into one of seventeen categories describing various aspects of the electronic media. The categories will be discussed in detail later in this chapter. For the purposes of this paper, the term "electronic media" refers primarily to radio and television, but also includes cable television, satellite transmissions and other ancillary forms of broadcasting.

The analysis does not include the entire editorial content of the magazine, nor its advertising. It was decided that in order to avoid clutter and to develop a clearer picture of the editors' agenda, only normally displayed articles would be examined. That is, small "blurbs," usually consisting of one or two paragraphs displayed in shaded boxes, were excluded, unless they covered at least 25 percent of the area of a page. The reasoning behind the exclusion of the blurbs was that they most often contained information of little use to the analysis, largely consisting of sidebar comments and trade gossip.

Also excluded from the content analysis were the various departmental columns appearing throughout the magazine. The content of these columns were short, usually
one-paragraph items also in the vein of trade gossip. These columns included such headings as "In Sync," "Cable Castings," "Datebook," "In Brief," "Fifth Estater" and "For the Record." Because of the items' short length and their minor importance as news data, they were also excluded in order to reduce clutter. The rationale here was that the inclusion of such items would dilute the value of the stories displayed more prominently in the magazine.

Two items of a non-news nature were included in the analysis. These items, "Monday Memo" and "Editorials," represent the editorial views of guest writers and the staff of the magazine, respectively. It was felt that the inclusion of these items, representing both the voice of the industry and that of the magazine, would help in understanding Broadcasting's agenda.

The categories

In the fifty-two issues of the magazine analyzed, 1,306 articles were categorized. The articles were then placed into one of seventeen categories (see table 1). The placement of an article into a specific category was determined by the main theme of the item. For example, an article describing NBC's fall schedule would naturally fall into the "programming" category. On the other hand, many articles contained more than one theme. As an example, an article might describe the ratings success of NBC's fall
schedule and its impact on the company's finances. In a case such as this, one theme is designated the primary theme with the others designated as "subthemes." In the example cited above, the main thrust of the article is determined to be the financial impact of NBC's ratings. Therefore, this article would be included in the business category, rather than the "ratings" or "programing" categories.

<table>
<thead>
<tr>
<th>TABLE 1.-- Article categories</th>
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<tbody>
<tr>
<td>1. Advertising</td>
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<tr>
<td>2. Associations</td>
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<tr>
<td>3. Business</td>
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<tr>
<td>4. Cable</td>
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<td>5. Editorials</td>
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<tr>
<td>6. International</td>
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<tr>
<td>7. Interview</td>
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<tr>
<td>8. Journalism</td>
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<tr>
<td>9. Law</td>
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<tr>
<td>10. Legislation</td>
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<tr>
<td>11. Monday Memo</td>
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<tr>
<td>12. Programing</td>
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<tr>
<td>13. Radio</td>
</tr>
<tr>
<td>14. Ratings</td>
</tr>
<tr>
<td>15. Regulation</td>
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<tr>
<td>16. Satellites</td>
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<td>17. Technology</td>
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</table>

The categories selected represent the major interests of the broadcast community. It would have been possible to create more or fewer categories, but it was felt that these groups represent a compromise between categories that would have been too broad in scope and those that would have been too narrow to be of any practical use. The "journalism" category, for example, could have been broken down into such units as "local journalism," "network journalism" and
"satellite news gathering." For the purposes of this project, little would be accomplished by subdividing this category, as there is a high degree of interrelationship among the various types of electronic journalism.

In discussing the reasons for constructing the various categories, it should be noted that the categorization was done for two reasons. First, it will help in determining the agenda of Broadcasting magazine. Second, these categories have formed the basis for constructing the questions in the survey of local managers. The survey will be discussed in greater detail in chapter 4.

The following is a discussion of the construction of each category and the content of the articles applicable to a specific category.

**Advertising**- The status of the advertising industry and its close relationship to the television industry is the primary subject of this category. Also included are articles describing advertising sales techniques and their relationship to television programing, such as barter-syndication program sales.

**Associations**- The articles in this category concern the meetings, conventions and other group activities conducted within the industry. This category is restricted to a description of the organizations' existence and their functions-- articles describing the consequences
arising from the activities of the organizations are included in the applicable category.

**Business**—The articles in this group include those on the business climate of the electronic media; profits and losses within various entities in the television industry; property transactions in the electronic media; and management activities, including changes in management personnel. The focus of the articles in this category is the business of television, as opposed to the aesthetic, artistic or technical aspects of the medium.

**Cable**—A distinction is made for the purposes of categorization between articles that describe the various aspects of television in general and those that restrict themselves only to a discussion of cable television. The articles devoted to cable are included here, covering such topics as cable programming techniques; cable's status in court decisions; and the penetration of cable programming into American households.

**Editorials**—As in the previous category, these "articles" comprise the content of the weekly "Editorials" page in the magazine.

**International**—The focus of the articles here is on television developments in other countries, and, if applicable, their effect on the American television industry.

**Interviews**—The creation of this category was
necessitated by the appearance of periodic interviews of major television industry leaders in Broadcasting. The content of these interviews was not amenable to insertion in the other categories.

Journalism- The articles in this category concern the journalistic practices of broadcast television. This includes the techniques and practices of television news organizations; the personnel engaged in broadcast news gathering; and the relationship between news organizations and various governments.

Law- While this category is related to "legislation," it differs in that it focuses on the legal arena, particularly on court cases that involve television interests. This includes legal complaints filed against television organizations, including those filed by regulatory agencies, and suits pursued by one television organization against another. Also included are articles describing the impact of various court decisions involving both broadcast and cable television.

Legislation- This category consists of articles that describe the relationship between the television industry and various legislative bodies, on both the state and national levels. Of primary concern are those articles that describe the actions taken by these legislative bodies that affect television operations in some manner, such as the effects arising from the enactment of various laws.
Monday Memo - The articles included here are simply those that appear under the byline of a guest columnnist in Broadcasting's weekly "Monday Memo" column.

Programing - This category concerns itself with the content of television programing, including articles discussing various types of programing; the manipulation of network programing schedules; the relative success of various program genres; the implications of syndicated programing; and the ramifications arising from the broadcast of specific programs. It is closely related to the "ratings" category, with many of the articles on programing concerning the ratings success or failure of different programs. The inclusion of an article in this category, however, is restricted to the programing itself, with those articles where the ratings numbers take precedent referred to the "ratings" category.

Radio - This category is restricted to articles describing the medium of radio, including radio programing; the radio industry's relationship with regulatory bodies; technological developments in radio; and the composition of radio audiences. Since radio is a medium distinct from that of television, articles on the subject of radio are not included in other categories, although they may refer to the television industry on occasion. Although this project is concerned with television, it would improper to omit this category since it is important in understanding the full
range of Broadcasting's agenda.

Ratings- Although related to "programming," this category includes only articles pertaining to ratings figures and ratings-gathering organizations. This also includes articles on the development of demographic figures and articles on the development of audience measurement technology.

Regulation- This category concerns, for the most part, the activities of the FCC, the regulatory body that governs the electronic media. The articles in this category describe the effect that the FCC and other regulatory agencies have on the television industry through their enforcement of rules and regulations, as well as their rule making procedures.

Satellites- This category is restricted to articles describing satellite technology and its effects on the television industry. This also includes articles on the activities of the major satellite decision-making bodies.

Technology- The articles included in this category are those concerned with the technological aspects of broadcast and cable television. The articles describe the development of new equipment and the effects arising from the introduction of this equipment into the marketplace.

The reliability of the category construction was tested by having a person unfamiliar with both Broadcasting and
the workings of the television industry code twenty randomly selected articles used in the content analysis. This resulted in a coding agreement of 75 percent.

Results of the content analysis

Having established the various categories for the content analysis of Broadcasting, it is now appropriate to discuss the major themes of interest in each category, as well as how these themes apply to the local manager. These themes represent the most prominent stories carried in the magazine during the period under study. It is also important to note the frequency of occurrence of the articles in each category. As can be seen in table 2, the

<table>
<thead>
<tr>
<th>Rank</th>
<th>Category</th>
<th>Number of Articles</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>1.</td>
<td>Business</td>
<td>226</td>
<td>17.3</td>
</tr>
<tr>
<td>2.</td>
<td>Programing</td>
<td>155</td>
<td>11.9</td>
</tr>
<tr>
<td>3.</td>
<td>Associations</td>
<td>120</td>
<td>9.2</td>
</tr>
<tr>
<td>4.</td>
<td>Regulation</td>
<td>117</td>
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number of articles in each category is not equally distributed by any means. This statistic will give some indication of the importance that Broadcasting places on a particular category of articles. The categories will now be discussed in this rank order of frequency.

1. Business- Although television is treated in many forums as an art form, it has become increasingly apparent in recent years that it is also a very important business structure. Some indication of the importance of television's business aspects is shown by the fact that the "business" category ranks first, comprising 17 percent of the articles in the content analysis.

The majority of the articles in this category involved the flurry of takeovers, mergers and sales occurring within the media. The recent explosion of media transactions, the effects of which could dramatically alter the media in this country, have been spurred by two realizations within the nation's financial community. First, it was determined that many stocks in the media were vastly undervalued. Second, investors saw that ownership in the media provided one of the highest returns on investment of all major businesses. Thus was born a trading boom that continues today.

Of particular interest to Broadcasting magazine was the spate of takeovers that have occurred in the last three years. Some of these takeovers, most notably the ones
involving the three networks, made national headlines. After decades of stability, all the networks found themselves under new management. Capital Cities engineered a non-hostile takeover of ABC, while General Electric "merged" with RCA and its subsidiary, NBC. At CBS the situation was less clear-cut. First, Ted Turner made a failed effort to buy the network. A few months later, the Loew's Corporation bought 24.9 percent of CBS's stock, just under the 25 percent limit regarded as an unauthorized transfer of control by FCC regulations. Although skirting the legal requirement, Loew's is in de facto control of the network.

The changes at the networks were of major importance and deserved the national attention they received. For the local television manager, however, other takeovers occurred that would affect his job more closely. As television and radio stations have become more popular as investment opportunities, various station groups began to increase their holdings, prompted by an FCC ruling that increased ownership limits from seven TVs (five VHF, two UHF) to twelve TVs (any combination of UHF and VHF). The only restriction left by the commission was that any one group of stations may not exceed 25 percent of the nation's viewing audience.

After the change in FCC policy, groups such as 20th Century Fox, the Tribune Company and Gannett launched
acquisition plans that soon brought them a significant part of the national audience. In addition, numerous limited partnerships and other investment groups jumped at the chance to enter the station buying spree, making them instant media powers. Television stations began trading at rates never seen before. Radio stations sold nearly as quickly, with record prices set for FM stations one week, only to be broken the next. In one case, the Telstar Company purchased twenty-two radio stations in one transaction.

The trading frenzy was not limited to broadcast stations. Advertising agencies began a trend of buying and merging with each other. To the uninitiated, names began to swirl together as Saatchi and Saatchi bought Backer and Spielvogel, and then bought Ted Bates, while Ogilvy and Mather obtained Adams and Reinhart. The result of these mergers created huge multinational agencies, leaving fewer agencies to do business with the networks and local stations.

The effects of the extensive trading in the electronic media are reflected in other articles falling in this category. As broadcasters took on large amounts of debt as a result of their acquisitions, articles on layoffs and management shuffling began to appear in Broadcasting. Particularly hard-hit was CBS, as a result of its expensive defenses against takeover. The network let go hundreds of
employees and fired many executives. At ABC, with the cost-conscious Capital Cities in control, new management philosophies brought an across-the-board belt tightening, with more layoffs among staff and management. The same scenario is expected to occur at NBC, once General Electric's management team has settled in.

For the local television manager, these changes may seem remote, but the effects are being felt at the local level. A change in ownership may result in the new owners bringing in their own people to run the station. Or, if current management is left in place, the manager may feel pressure to generate increased profits as the owners seek ways to alleviate their debt burden. This could (and has in some instances) result in layoffs and management changes at the local level. Even the merger mania among advertising agencies and representative firms has affected the local manager, as his sales staff must adapt to dealing with new entities. It appears that a "trickle-down" theory of sorts may be at work, with changes on the national level trickling down to the local level.

2. Programming—Programming is the means by which television networks and local stations attract an audience. Larger audiences mean higher ratings, which generally results in more revenue for the network or station. It is, therefore, not surprising that the number of "programming"
articles ranks second only to "business."

At most local stations the program director is primarily responsible for acquiring local programming. These acquisitions may range from shows in prime access or late night time periods at network affiliates to arranging the entire broadcast day at independent stations. Whether the station is an affiliate or an independent, it is common for the station manager to work closely with the program director in deciding which programs to purchase or produce. Because the ratings of the selected programs directly influence the prices paid by advertisers, they are a major factor in the station's revenue. It is imperative, then, that the local manager be closely involved in programing decisions.

In the "programing" category most of the articles can be included under one of three themes--network programing, syndicated or local programing, and ramifications of programing. Since network programing affects managers at all levels of television, it receives the most space from Broadcasting. Of special interest to the editors are the strategies and tactics employed by the three networks in order to increase their ratings and audience share. Many of the articles involve the relative success or failure of the networks in this regard.

During the time period of this analysis, NBC had taken a firm hold on the ratings leadership, leaving CBS and ABC
to fight over second place. The articles in Broadcasting reflect this, with examinations of how NBC had achieved its success, and the strategies employed by ABC and CBS in their attempts to catch the leader. These strategies consist mainly of moving existing shows to new time periods, canceling existing programs and adding new ones. Many articles examine the metamorphic state of the networks' schedules, including analyses by network program executives and officials from the major advertising agencies. The opinions expressed by the latter are very important, since their judgment of a program's potential affects the price the networks can charge for advertising within a particular program.

The ratings achieved by the networks become an important factor in the profitability of the local affiliate, and the success or failure of the networks' programming is of some concern to the local manager. Although the networks pay their affiliates a fee to carry their programming, a more lucrative income is derived by the affiliates in selling local or national spot advertising within the network schedule. The rates charged by the affiliates for these network availabilities are directly related to the ratings of the network programming. These prices are determined during the quarterly "sweeps" periods, where the networks escalate their battles in order to achieve higher ratings. It is during the sweeps periods that the networks roll out
their mini-series and other special programs in an attempt to reach number one, or at least improve their ratings from the last quarter. The local manager, as a representative of his affiliate station, has a small voice in the overall network programing scheme through one of the national affiliate groups.

For the managers of independent stations, none of the above discussion is pertinent, since they have no network with which to affiliate. (This may be changing with the introduction of the Fox Broadcasting Network, designed for independent stations.) Both independent and affiliate managers must have a thorough knowledge of the many syndicated programs currently on the market. While the advertising revenue from syndicated programing is important to the affiliate manager, it is nearly the sole source of income for the independent.

With the relaxation of FCC regulations and an increased interest in broadcasting properties, the number of independent stations in this country has grown dramatically, from 120 in 1980 to 283 in 1985. Concurrent with the growth of independent stations has been the growth of syndicated program services offering programing for these stations. As a result, Broadcasting offers a good deal of space to stories on various syndicated offerings. In addition, it publishes a weekly column, "Syndication Marketplace," detailing the latest syndicated shows.
It is important for the local manager to keep up on the state of syndication, especially the popularity of different program formats. In the time period under study, game shows became the most popular syndicated product, as indicated not only by their ratings but by the attention allotted to them by the magazine. Broadcasting published three articles alone on "The Wheel of Fortune," with numerous other articles on the status of its competitors.

Another trend currently being followed by the magazine is the rise in popularity of the first-run syndicated sitcom. Just a few years ago sitcoms produced specifically for syndication were rare. Now, with the increased number of independents, such programs have become economically viable. Their popularity, however, does not stop with independents. Affiliates, too, need to fill programing time and have made great use of first-run syndicated product. Of special concern to the affiliates is "prime access," the time period from 6:30 to 7:00 P.M. (central standard time). Until 1970 this time slot was programed by the networks when the FCC adopted its prime access rule, requiring each network affiliate to broadcast at least a half-hour of local programing during prime time. The FCC anticipated that local stations would create their own family-oriented programs for this period. In reality, this time slot has proved to be a great profit center for the stations, filled with game shows, sitcoms and light news fare such as
"Entertainment Tonight." The profits to be made from prime access make program choices for this time period critical.

The third theme in this category concerns the ramifications of programing. While most programs tend to float by the audience without any lasting effect, some programs create controversy. The editors of Broadcasting follow those controversies, especially those arising from PBS programing. One such program, "Television's Vietnam: The Impact of the Media," aroused a storm of protest from conservative groups, particularly Accuracy In Media (AIM). A series of articles in the magazine detailed PBS's defense of the show and AIM's attempts to force PBS to air an AIM-backed rebuttal to the Vietnam documentary. A similar situation is currently brewing over "The Africans," with various conservative groups blasting its content and threatening retaliation.

Other articles covering attacks on television programing concern such topics as television's treatment of women, the running of R-rated films by independent stations, the image of older women on television, and the medium's alleged glamorization of drug use.

The reporting is not confined to negative articles, however. Television garnered praise in stories on the current campaign against illiteracy, spearheaded by ABC and PBS. Various groups, including Action for Children's Television (ACT) applauded some new children's shows,
especially NBC's "Main Street." It was, nevertheless, the negative articles that appeared most often in this group.

As stated previously, it is imperative that the local manager be in tune with his station's programing, not only the local efforts but that of the networks as well. The manager cannot directly affect network programing, but he can make his voice heard through affiliate groups. As for local programing, both affiliate and independent managers must not only be aware of current programing trends but must know what the audience wants to see. The bottom line of the station depends upon it. The manager must also be aware of, and ready to deal with, any controversies that may arise from the airing of certain programs. In this regard, a good sense of local tastes is called for.

3. Associations- The fifth estate appears to be a hotbed of many groups, associations, and societies. In a year's time thirty-nine different organizations representing various aspects of radio, television, film, and advertising appeared in the pages of Broadcasting, making up a veritable alphabet soup of initials: BDA, NAB, TVB, ARF, AAF, NATPE, SPACE, ad infinitum. These groups exist for several reasons: 1) The media live in the glare of the public spotlight. These groups serve as a forum to keep the image of the media as positive as possible in the eyes of the public. 2) The electronic media have become highly
specialized. Radio's priorities differ from those of television or those of advertising. Even within one group, such as the National Association of Broadcasters (NAB), functions are specialized in order to meet the needs of different media. 3) The groups function as a clearinghouse of information. For example, AAF, the American Advertising Federation, develops advertising income figures for the industry. The Cable TV Administration and Marketing Society (CTAM) aids cable systems in marketing their product. 4) The groups act as the voice of different parts of the industry, particularly in lobbying efforts in Congress. In most cases the lobbying is for a mutual cause, but at times Congress faces a barrage of media groups lobbying against each other. One such example concerns the fate of a bill on a possible moratorium of satellite scrambling. The Satellite Television Industry Association (SPACE) supported the bill while the National Cable Television Association (NCTA) wanted no Congressional interference in scrambling. NCTA eventually got its way.

In the main, the larger groups such as NAB serve as a means for those in the industry to get together, exchange ideas and see new programming and equipment. Some of the national groups, including NAB, the National Association of Television Program Executives (NATPE), and the Association of Independent Television Stations (INTV) receive great attention in Broadcasting, which devotes special sections
to their annual conventions. Because they are national
groups with large memberships, the local manager would be
likely to keep abreast of developments within these
organizations, if he is not already a member. They
represent a powerful voice in the industry, in Congress,
and with the FCC and other regulatory agencies.

Even within a single station the influence of the many
media associations is pervasive. The general manager might
be a member of NAB; his program director may belong to
NATPE; the sales manager to the Television Bureau of
Advertising (TvB); the business manager to the Broadcast
Financial Management Association (BFMA); and the chief
engineer to the Society of Motion Picture and Television
Engineers (SMPTE). When the manager meets with his staff
the pooling of knowledge from these organizations can be of
help in increasing the success and efficiency of the
station.

4. Regulation—This category mostly concerns the
activities of the FCC, the regulatory body that governs the
electronic media. A better title for this category might
have been "deregulation," since the commission, under the
stewardship of Chairman Mark Fowler, has set out to
eliminate or modify many of its own rules. According to
Fowler, "TV is just another appliance. It's a toaster with
pictures. Consequently, there's no reason for it to be
regulated so tightly."\textsuperscript{6}

The FCC owes its existence to two concepts developed by the government. The first of these concepts is that the airwaves are "owned" by the public, an idea that was enacted into law in the Communications Act of 1934. This "public trustee" concept is currently being questioned by Fowler's FCC. The second concept concerns scarcity. The rationale here is that there is a finite amount of airwave spectrum for broadcast signals, hence the need to regulate that spectrum. The FCC was created to enforce these concepts and has created a large body of regulations as a result.

In this category several themes emerged in Broadcasting's articles that deserve attention. One of these themes is deregulation and the FCC's efforts in reducing its own regulatory powers. Although the deregulation trend began before the time of this study, the FCC's efforts in this direction have continued to be newsworthy. Articles in the magazine regarding deregulation should be of great interest to the local manager as they can impact directly on the operation of his station.

Topics under the theme of deregulation include such FCC activities as the elimination of many technical rules regarding transmitter operation; a reduction in the extensive amount of paperwork required by the commission to obtain or renew a license; and the aforementioned relaxation
of ownership limits.

At this writing several other deregulation efforts are in progress. The FCC would like to do away with the Fairness Doctrine, which states that "when a broadcast station presents one side of a controversial issue of public importance reasonable opportunity must be afforded for the presentation of contrasting views." The commission believes the doctrine to be restrictive and unconstitutional, a belief shared by the Radio and Television News Directors Association (RTNDA) and Meredith Publishing, who are currently fighting for its repeal in the courts. According to a series of articles in Broadcasting, the issue has yet to be resolved, since no one seems sure whether the courts, the FCC, or Congress has the power to uphold or eliminate the doctrine.

Another burden the FCC would like to rid itself of is its minority preference policy, whereby women and minority groups receive preference in receiving broadcast licenses. The FCC believes that it doesn't, or shouldn't, have the power to enforce such a policy and received support for its conclusion in the controversial Steele decision. Amid a storm of outrage from minority groups this problem remains unsolved.

Many of the articles in this category reflect the aftermath of takeovers, mergers and sales, as recounted in the "business" category. These transactions have kept the
FCC busy, as it must approve or disapprove situations under which a transfer of control exists. The GE-RCA merger and the acquisition of ABC by Capital Cities required the FCC to set up certain stipulations in order to complete the transactions. Under current rules no single entity may operate a television and radio station in the same market. The mergers created situations where these rules were violated, as well as activating "grandfather" clauses where certain entities were allowed to operate both radio and television facilities in one market because they existed before the rules were enacted. In order to complete the transactions the FCC had to develop plans for the disposal of the grandfathered stations and other stations that violated its multiple ownership rules.

The commission also presides over disputes arising from the sales of single properties. Several proposed sales were blocked because of an FCC rule allowing for competing applications whenever a broadcast property is put on the market. Several articles in Broadcasting describe the ongoing battles to complete the sales of the stations involved, as well as the FCC's role in the proceedings.

Perhaps the major theme in this category, and one which would most affect the local television manager is the ongoing fight over the must-carry issue. The must-carry rules required all cable systems to carry the signals of all television stations whose grade B contour fell in the
system's franchise area. This created problems for many cable outlets who found themselves forced to carry duplicate network stations as well as two or three PBS stations. Cable systems with small capacities found their systems cluttered with broadcast stations, leaving little space for such cable channels as WTBS or ESPN.

At length, the cable industry fought against the must-carry rules, and in September of 1985 won their case when the U.S. Court of Appeals ruled must-carry to be unconstitutional. This presented a dilemma for the local manager. Under the must-carry rules his station was guaranteed coverage by local cable systems. This carriage not only provided a better picture to cable-equipped homes but spread the signal into areas that would not have ordinarily received his station. With the abolition of must-carry the local station might have to negotiate carriage with the cable systems, a matter that became essential with cable penetration reaching nearly 50 percent of the nation's homes. If the local station found itself locked out of cable coverage its audience in cable homes would decrease dramatically, since many of them had disconnected or discarded their television antennae.

The FCC was called upon by Congress and by cable and broadcast groups to write new rules that could withstand a constitutional test. Lobbying by both sides was intense as each group sought an advantage under the new rules. In
August of 1986 the FCC released new must-carry rules that relied heavily on a tentative compromise agreement reached by cable and broadcast groups. The rules retained the idea of must-carry, with cable systems required to devote a certain percentage of their channel capacity to broadcast signals. In the case of duplicate network signals the cable systems were given the option of selecting the signal they would carry. The FCC, however, added some wrinkles of its own to the new rules, including the mandatory installation of an A/B switch that would allow cable homes to switch from cable to an outdoor antenna. The new rules were greeted less than enthusiastically by those involved, and of this writing, the must-carry issue is still unresolved.

Although the FCC has made deregulation its major goal, this agency still wields a great deal of control over the broadcast community. The local manager is still responsible to the commission for technical matters, for matters of program content (especially obscenity), and for upholding such rules as the Fairness Doctrine. The local manager is beholden to the FCC for the very existence of his station since the commission holds the power to approve or deny license applications and renewals. At present, the FCC holds the power to alter the relationship between local stations and cable systems, a major issue of concern for local managers, especially those at stations where survival depends on cable carriage.
5. Journalism- From inauspicious beginnings television news has risen to become America's first choice for news and information. Newscasters such as Walter Cronkite, Dan Rather, David Brinkley and others became television stars as a result of the popularity of their news programs. Accordingly, the prices paid by advertisers to appear on these programs skyrocketed, both on the national and local levels. In fact, news became a major profit center for many local stations, although most of the money flows to the network affiliates. Because of the importance of television news as a source of information to the viewer and as a source of income to the broadcaster, television journalism ranks high in Broadcasting's coverage.

There were no stories of singular import concerning journalism in the time frame of this study. There was, however, the emergence of a trend that may forecast a radical change in the balance between local and network news coverage. This trend was not brought about by public demand or a change is journalistic behavior, but by a development in technology-- satellite news gathering, better known as SNG.

SNG can trace its origins back to the early 1970s, when electronic news gathering, or ENG, first arrived on the scene. Small electronic cameras utilizing videotape rather than film allowed both network and local stations to cover stories faster and more simply than had been possible with
film. Videotape did not have to be processed, as did film, and could be edited more quickly and easily. ENG allowed the visual side of news reporting to take a more prominent role in the newscast.

ENG did not affect to any great extent the relationship between network and local news operations. The networks, with their greater resources, dominated national and international coverage. ENG did allow local stations to feed stories of interest back to the networks via telephone lines, something that was not easily done with film. Still, the local stations found themselves dependent on network news feeds for stories of national interest.

The arrival of SNG in the news marketplace promises to change this relationship. The key to this new development in technology is the use of synchronous orbiting satellites. Heretofore, the networks had made use of satellites but because of the enormous costs involved and the bulkiness of C-band satellite receivers, the local news operation could not afford to use them. Both of these problems were solved with the introduction of Ku-band satellites. These new "birds" are more powerful than C-band and can utilize receivers much smaller and more portable. In addition, the popularity of Ku-band resulted in more satellites being put into orbit. There is at this time an overabundance of Ku-band transponders, so much so that prices for using the transponders have dropped
dramatically.

The result of these developments is that the local news operation now has access to portable, easily operated satellite equipment and the use of the satellites needed to transmit news information. Quickly grasping the importance of these developments, groups such as the Florida News Network and Conus Communications have set up their own news operations whereby a group of member stations trade stories through a satellite clearinghouse. Conus, in particular, has proved to be a successful venture with affiliates from all three networks, plus a few independents, as members. It did not take the network news operations long to realize that groups such as this threatened their exclusive franchise on national and international coverage.

The impact of SNG will be greatly felt by the local television manager. Since he holds the power to engage or not engage in SNG activities he must decide the worth of the new technology. More than likely the local manager will receive pressure from his news director to buy SNG equipment. The news director may want to be the first in the market to use SNG, thus giving him another tool with which to sell his newscast. Or, if a competing station already has SNG, he may be worried that his station will lose out in both news coverage and ratings if the competitor's advantage is not checked.

It is a decision that must be weighed carefully by the
local manager. Even though the networks, fearful of losing affiliate support, are giving their member stations financial assistance in obtaining SNG equipment, it is still a major investment for the station. Initial set-up costs for SNG can run over $750,000,8 an amount which must be justified to owners and stockholders. The manager must ask himself whether the large expenditure is worth the potential, but uncertain, increase in station visibility and ratings.

Although SNG dominated Broadcasting's coverage in this category there were other journalistic concerns reported in the magazine. Scattered throughout the period of this study are articles on the difficulties of covering the affairs of state. In November of 1985 the South African government imposed a ban on television, radio and photographic coverage of its racial turmoil. Later that month a press blackout was imposed during the Geneva summit conference between President Reagan and Soviet leader Mikhail Gorbachev. Another blackout was forced on the media by the United States government in March, 1986, during the Navy's confrontation with Libyan forces in the Gulf of Sidra. Still more difficulties arose in May in covering the accident at the Chernobyl nuclear reactor in Russia. Other problems developed over an alleged "disinformation" campaign by the White House, resulting in the resignation of State Department spokesman Bernard Kalb.
These articles, a significant part of Broadcasting's journalism coverage, are not of major concern to the local manager since they mostly involve network news operations. It might be wise, however, for the local manager and his news director to be aware of such problems in reporting. The growth of SNG might put them in the same situation in the not-so-distant future.

6. Legislation- The theory of spectrum scarcity and the public trustee function of the electronic media have made the television industry subject to a vast amount of scrutiny and legislation by the government. Not only do television and radio have to answer to the decrees of the FCC but also to the House of Representatives and the Senate, each of which have special committees devoted to overseeing the electronic media. The close relationship between television and legislative bodies has resulted in many articles on legislative activities in Broadcasting.

During this study the majority of legislative articles did not directly concern the local television manager. This does not mean that they are of no interest or importance, since a good manager is aware of developments at the national level. As previously mentioned, many national events have a way of trickling down to affect local stations.

In the "legislation" category the major story was the
introduction of television into the U.S. Senate. Although the House has allowed continuous coverage of its proceedings since 1979, the Senate had firmly resisted similar coverage until March, 1986, when it allowed experimental broadcasting from its chambers. After a long and sometimes bitter struggle between pro- and anti-coverage factions television became a permanent part of the Senate in August of 1986. A cable consortium now sponsors the televising of both houses of Congress on two cable channels, C-SPAN I and C-SPAN II.

The actions of the Senate in allowing camera coverage of its proceedings may well influence the outcome of a similar evolving story, that of allowing television cameras into the chambers of the Supreme Court. Televising the Court's proceedings has been a goal of news organizations for years, but has been consistently blocked by Chief Justice Warren Burger. When Burger announced his retirement, the prospects for coverage brightened considerably when his successor, William Rehnquist, said he would "give it sympathetic consideration." The significance of the developments in the Senate and Supreme Court is well understood by those in network news and by those stations with SNG capabilities, who may find themselves sending reporters to Washington D.C. to do live reports on matters of local interest.

Of more immediate interest to the local manager is the
ongoing debate over the Fairness Doctrine. The FCC, as previously discussed, has made one of its goals the elimination of the doctrine, with the backing of the U.S. Court of Appeals, which found that fairness is not a statutory obligation imposed by Congress. With this decision Congress has attempted to codify the doctrine, but as of this writing has failed. Should the current situation stand, local stations will find themselves with greater freedom to editorialize without fear of giving obligatory air time to those with opposing views. This development will be of special interest to those local managers on whom falls the task of delivering the station's editorial comments.

The remainder of the articles in this category represent a hodgepodge of legislative issues. Some of the topics covered by Broadcasting are poll closing bills, satellite scrambling lobbying, nominations for the Federal Trade Commission, radio frequency emission guidelines, and the continuing struggle over a final must-carry agreement.

Although there is much here that does not directly concern the manager at the local level, he would be wise to follow the activities of the legislative branch. Activities in Congress that affect the networks may well affect his affiliate station. Changes in tax laws or minority hiring policies may affect him as well. It is not enough for the local manager to keep abreast of only local events.
7. Law—Closely related to the "legislation" category is the "law" category. The articles in this category, along with those in the "regulation" and "law" categories, form a triad of interrelated activities, many of which have an impact on the electronic media. Because of the unique nature of broadcasting and the necessity to keep close ties with legal and legislative bodies it is essential that the local manager be aware of legal decisions.

Broadcasting carries regular coverage of the legal arena, concentrating on those cases that have a direct bearing on the fifth estate. As with the articles on the legislative branch, most of the legal events reported by the magazine have no direct effect on the local manager. These articles should at least be of some professional interest, though, since the legal system has provided the basis for many recent developments in television. The Fairness Doctrine, once considered unassailable, now stands in jeopardy because of a court ruling. The must-carry rules, long held as an essential part of the television-cable relationship, have been erased by the courts. The FCC's minority preference policy has also been struck down. The growth in popularity of television as a business investment and the subsequent growth of powerful television groups has resulted in a greater involvement by the courts in the medium's activities.

On the libel front, 1986 was a quiet year for the
networks, especially in contrast to the recent Westmoreland and Sharon suits. The only major libel contest involved CBS and Lieutenant Colonel Anthony B. Herbert, who filed a $44.7 million suit against the network. Although Herbert won the initial decision he later lost on appeal. A further sign of good news for the industry was an article appearing in the April 21 issue of Broadcasting, reporting that the number of libel cases filed against the media had dropped.

NBC's biggest legal headache, aside from the myriad of details surrounding the GE-RCA merger, was its relationship with the Justice Department. In May, CIA Director William Casey urged the department to bring criminal charges against the network for broadcasting classified information on U.S. communications intelligence activities as a part of a "Today" show report. The information was reported in a story on accused spy Ronald D. Felton. Formal charges against NBC have yet to be filed.

Just a few days later the network enraged the Justice Department again by airing an interview with Abul Abbas, who is believed to have masterminded the Achille Lauro cruise ship hijacking. In this case, the Justice Department wanted to know the whereabouts of Abbas, but was denied the information.

Few of the major stories in this category involved broadcast television. Cable television, on the other hand, scored several legal victories in 1986, beginning with the
must-carry decision. In addition, cable's establishment of first amendment rights was reinforced by the Supreme Court in the Preferred decision, as the result of a suit brought by a Los Angeles cable company. The company had been denied permission to install its services in a section of the city already served by a competing cable service. The court ruled that denying the company the opportunity to offer its services was a violation of the company's right to free speech.

One final area of interest in this category concerns the sale of several broadcast properties. The number of competing applications for television stations on the market has risen, resulting in increased legal action. RKO General, in particular, has been hard hit in its attempts to sell its television subsidiary. It has been unable to sell any of its stations due to lawsuits filed by rejected buyers. The disposition of its two flagship stations in New York City and Los Angeles is already well into the courts, which will ultimately decide who can buy the stations. The same fate befell the Spanish International Communication Corporation (SICC), which was ordered by the courts to liquidate its television holdings because of foreign ownership. Although SICC found a buyer for its stations the sale is still being held up in the court system by losing applicants.

With the increasing frequency of litigation surrounding
the electronic media there is at least a fair chance that the local manager will find himself involved with the legal system at some time in the future. While the manager cannot be expected to be a legal authority, he should at least know the pitfalls that could befall his station. In this way he can be of greater help to the station's legal representatives if his station finds itself in court.

8. Advertising—Advertising revenue is the life blood of television, supplying the average station with 80 percent or more of its income. It may seem surprising, then, that Broadcasting hasn't given more space to this category, which contained only fifty-four articles. There are two factors to explain this. First, many articles concerning advertising were placed in the "business" category, as it was determined that their primary themes were more relevant to business activities. Second, the advertising community is better served by publications such as Advertising Age, which attracts a more specialized audience than does Broadcasting. This is not to demean Broadcasting's advertising coverage, which is still significant.

The articles in this category contained no events of singular importance, but rather gave an overview of the advertising industry and its relationship with the electronic media. The most numerous theme among the articles was the state of advertising sales in radio and
television. Since the local manager usually has little interest in radio sales, the television aspects of advertising will be explored here exclusively.

A starting point for the advertising-television partnership in the 1986-87 season can be found in the May 5 issue of Broadcasting. It is here that a story relates the major advertising agencies' opinions of the networks' fall schedules. On the whole, the opinions can best be described as mixed. Another facet of the partnership can be found in the June 16 issue, when the Nielsen organization issued its quarterly report on the networks' delivery of key demographic groups in prime time. As could be expected, the number one-rated network, NBC, also led in delivering the important demographic age groups of "men 18-34" and "women 18-34." This kind of information is vitally important to advertisers, since they try to place their messages where they will be seen by the demographic groups they most want to reach.

Later in June, a study conducted by several advertising agencies predicted only a slight increase in network billings. These predictions were echoed a week later by network sales heads, who, based on sluggish scatter market activity in the previous quarter, foresaw a soft upfront selling market for the 1986-87 season. This was good news for advertisers, who could now afford to be tougher in their negotiations with the networks.
The above series of articles illustrate a developing trend in the advertising marketplace for the 1986-87 season. The advertisers are not overly thrilled with the networks' fall schedules, but they do see NBC as the best venue for reaching the most attractive demographic groups. The advertisers can look forward to increased bargaining strength in the new season, not only because of the so-so schedule, but because of a weak seller's market at the end of the 1985-86 season. The foundation has been laid for the negotiations to begin.

For the local manager such developments in the tug-of-war between the networks and the advertising agencies is of interest, but perhaps not in a direct sense. The manager is more interested in the sales his station can generate. In this case, the sluggishness of the network market can be good news at the local level. With a predicted weakness in the network upfront market the local manager can begin hoping for stronger activity in the national spot market. This market, which has been supplying an increasing percentage of local revenue, will prove to be strong for the local stations. Later articles in Broadcasting will predict national spot growth double that of the networks. If his network performs well in the sweeps periods the local manager can expect a reasonably good year. The independent manager, deprived of network availabilities, will have to place greater emphasis on local sales.
Another item of interest in this category is the use of barter-syndication as an advertising tool. Barter programs are usually given to local stations free or at very low cost in exchange for the stations' airing of commercials that have been included in the program. For example, a barter-syndication program might contain six minutes of commercial time. Two minutes of that time is sold by the syndicator to his clients, with the remaining four minutes sold by the local station. Barter programs have become very important to local stations, especially independents, who have a great amount of time to fill. The only catch to barter programs is that they might not be well-produced or could be a ratings loser, making it tougher for the local station to sell its part of the commercial time. The manager must decide whether to spend money on expensive cash-only syndicated programs, with the promise of increased ratings and advertising revenue, or risk the potential popularity of barter programs, which cost little or nothing to air but may return nothing as well.

Many of the articles in the magazine concentrate on such specific aspects of advertising as the advent of the fifteen-second commercial spot. The thirty-second spot has traditionally been the dominate mode of advertising, but recently the fifteen-second spot, or its cousin, the "split-thirty," containing two fifteen-second messages from the same sponsor, has altered traditional thinking. In 1985,
fifteen-second spots registered an increase of 216 percent over the previous year.\textsuperscript{10} While this amounts to only 1.1 percent of the total units sold, this trend is expected to continue.

Finally, it should be mentioned that the Fairness Doctrine also makes an appearance in this category. A series of articles in\textit{ Broadcasting} recount the efforts of W.R. Grace and Company to air its advocacy commercial on the federal deficit over the networks. Grace's efforts were rebuffed for months until CBS agreed to carry the commercial, provided one line was deleted. All three networks had stated previously that their policies precluded advocacy commercials because of possible demands for response time made under the auspices of the Fairness Doctrine. In the meantime, the commercial was endorsed by INTV, which encouraged its member stations to run the spot.

At the local station the onus for advertising sales falls mainly on the sales manager, but it is also of great interest to the local manager, who is ultimately responsible for the financial success of the station. As such, the local manager shares the sales manager's interest in developments within the advertising arena. The local manager must often decide advertising policy, such as whether to accept fifteen-second spots, or whether to allow companies such as W.R. Grace to air their advocacy commercials. It is interesting to note that many local
managers are, in fact, former sales managers themselves.

9. Monday Memo- This column, a weekly feature in Broadcasting, is a series of commentaries by people involved in all forms of the electronic media. It was included in the analysis of the magazine in the hopes it would provide some insight into the priorities of various media managers. Perhaps it will provide a forecast of the responses in the survey of local managers.

The managers who write for "Monday Memo" come from a wide variety of media businesses. A random sample of some of the authors include: Ron Nessen, former press secretary for President Ford and present vice president of news for the Mutual Radio Network; Michael S. Packer, station manager of KTRH(AM) in Houston; Virginia M. Westphal, vice president of advertising sales for Viacom Cable; Benjamin J. Griffin, a communications lawyer and partner in the law firm of Pierson, Ball and Dowd; Brad Marks, president of The Entertainment Search Co., an executive search firm; and Harlan Rosenweig, executive vice president of Group W Television.

The articles written by these managers include such topics as attracting the black viewer, radio format copycats, and the pursuit of quality management. Because of the variety of subjects covered, it would be impractical to discuss each one here. Instead, a "mini-analysis" was
conducted, based on the overall content analysis of the magazine. The goal of the mini-analysis was simply to get a rough idea of the topics of concern to the managers. The categories used for this analysis are the same as those in the overall content analysis.

The most popular topic among the fifty-two "Monday Memo" articles was advertising. Fifteen writers gave their opinions on the art of advertising, covering such subjects as cable advertising, children's advertising, sports marketing and advertising tie-ins, goals for the black advertiser, and the influence of ratings on radio time buying. A slight majority of these articles were on radio advertising, perhaps because radio's advertisers have to reach a much more fragmented market than their television counterparts.

The next most popular topic concerned business affairs. The guest authors wrote about broadcast property values, leadership in AM radio, hiring the right person, broadcast station assets, and the use of computers at a broadcast station. The overall theme of these articles stressed the factors involved in becoming an efficient manager and the financial means at the disposal of the manager.

Programming was also a popular topic for the "Monday Memo" writers. Here were the familiar concerns of those involved in television, including the controversies over children's programing and the effects of televised violence.
More specific thoughts centered on sports programming and television docudramas. A slight majority of the articles on programming were written from the viewpoint of radio, again because of radio's drive to reach a fragmented audience through the use of a diverse array of programming techniques.

There were only three articles on the regulation of broadcasting, two of these commenting on the FCC's deregulation efforts. Only three articles covered journalism, with two involving SNG. Interestingly, in the face of a trend, one writer described SNG as a waste of time and money. There were also three articles on broadcast technology, one explaining the technical aspects of SNG vehicles, one on the use of satellite scrambling systems and one on the future of direct broadcast satellites, more commonly known as DBS.

The results of the mini-survey did not exactly mirror the results of the content analysis. The most popular topic for the guest writers was advertising, which placed eighth in the magazine analysis. Business remained consistent as a popular subject in both analyses, as did programming. FCC regulations, the fourth most popular subject of Broadcasting's editors, was mentioned only three times by "Monday Memo" writers, as was journalism, which ranked fifth in the content analysis. The "satellite" and "technology" categories were not popular subjects with
either the editors or the guest writers.

Judging by "Open Mike," the title of Broadcasting's letters column, "Monday Memo" is a popular section of the magazine. It is not unusual for a letter to refer to a previous "Monday Memo" commentary, expressing either disagreement with an author's views or thanking him or her for expressing a shared opinion. It seems probable that the "Monday Memo" commentaries could be of some value to the local manager, due to the management status and success of the writers.

10. Editorials - The editorial comments in Broadcasting appear on the last page of the magazine, accompanied by a small cartoon. Rarely does the magazine devote its entire editorial page to one topic, instead printing two or three short editorials. During the time period of this study, 152 editorials appeared in the magazine, an average of nearly three per issue.

Broadcasting, as the leading magazine of the electronic media, may also be considered through its editorial page to be one of the leading voices of television. Since the magazine reaches a large number of top managers and decision makers throughout the industry, it can be assumed that its editorials have some effect on current media events.

The majority of the editorials are in response to news
events reported elsewhere in the magazine. For example, an article was run on the actions of the Meese Commission on Pornography. In its editorial the magazine blasted the commission on its findings. On the other hand, the editorials are often supportive of newsmakers and the events in which they are involved.

A sample of some of the editorials includes such topics as the GE-RCA merger, the threat of radio censorship, the future of must-carry, personnel cutbacks at the networks, activities at the NAB convention, the difficulties in setting technical standards, and a tribute to former CBS News president Fred Friendly. In all, a survey of the editorials reveals a wide range of topics covering all aspects of the electronic media.

There were two events that stood out among the editorials, events that received steady support from the magazine regardless of whether stories concerning the events had appeared that week. The subjects of Broadcasting's interest were the negotiations on television coverage of the Senate and the ongoing controversy over the Fairness Doctrine. The magazine ran eleven editorials on the Senate television issue and nine on the Fairness Doctrine.

Broadcasting's stand on television in the Senate is clear. Immediately after the Senate had voted to experiment with television, the magazine had this to say:
So that there is no misunderstanding, let it be recorded here that the Senate's long-overdue decision is applauded here as a first step toward the ultimate objective: true 20th century coverage of the Congress of the United States.11

When the Senate voted to keep the camera coverage permanently, Broadcasting was unhesitating in its praise, then immediately launched a campaign for similar coverage of the Supreme Court.

As to the Fairness Doctrine, the editorials took a hard line on its repeal. This excerpt sums up the magazine's philosophy:

For every foe of the Fairness Doctrine and admirer of the First Amendment on Capitol Hill there are a dozen waiting to protect the advantages that the doctrine confers upon incumbent office holders... Is it possible that after nearly 60 years of federal regulation, broadcasters at last have a reasonable chance of acquiring their entitled right to freedom of the press?12

The future of the Fairness Doctrine is uncertain, but it is certain that Broadcasting will continue to press for its demise.

There is little direct connection between the editorials and the actions of the local television manager. It must be assumed that the managers, as the leaders of their medium, have an active interest in the events and controversies arising in the television industry. It is important that the managers have access to important
opinions involving their field, since they must play an
active role in effecting the changes necessary to keep the
fifth estate a vital and free institution.

11. Satellites- Satellite technology has been a part of
_television for over two decades, yet it is only in recent
years that the "bird" has become an essential part of the
television transmission system. From a time when satellite
use was restricted to the networks and other organizations
who could afford the high cost involved, satellites are now
reaching into every level of television. The satellite has
even given birth to a new form of the medium—cable
television, with its many satellite-delivered networks.

The growth in satellite use has brought major changes
to the industry, revolutionizing the transmission of
information. The satellite dish is now a common feature at
local television stations, even those in the middle and
lower-sized markets. In fact, it may soon become a
necessity to have at least one satellite dish aimed at the
sky. Managers of affiliate stations use satellites to
downlink network news feeds and programing; some use them
for SNG, if the station is so equipped. At the independent
station satellites are being increasingly used to receive
syndicated programing and news, a practice that will
eventually eliminate the slow and expensive "bicycling"
method of distribution.
In keeping with the growth of satellite use, Broadcasting supplies its readers with articles on the latest activities in the field, including launch schedules, scrambling technology, and of course, details of the content flowing through the hundreds of available transponders. The magazine recently began running a new column, "Satellite Footprints," to keep its readers informed on the latest developments in the satellite industry.

There are two sides to Broadcasting's coverage of this field. The articles on such things as network-affiliate cooperative SNG ventures and the lists of available programming are aimed primarily at the local manager. In addition to this coverage, there is also an emphasis on the international aspects of satellite transmission, the ramifications of which affect the television industry on both the national and international levels. Because the primary theme of the articles describing satellite programming have been placed in the "programming" category, it is the international articles that dominate this category.

The major story among the satellite articles is the battle between the International Telecommunications Satellite Organization, or Intelsat, and the United States. Intelsat was created in 1964 by the U.S. in order to coordinate world satellite traffic. In addition, the creation of Intelsat allowed many countries that were too
poor or technically-lacking the opportunity to become part of the satellite system. The U.S. and Intelsat have worked fairly well together until late in 1985, when the U.S. authorized the construction of a world satellite system that would compete with Intelsat. Thus far, only one company, PanAmSat, has actually gone ahead with plans for a separate system, yet this has caused a major breach in relations between the U.S. and Intelsat, with PanAmSat caught in the middle.

As a representative of Intelsat, the U.S. has bound itself to abiding by the organization's rules, one of which stipulates that any competing system coordinate its orbital slot with Intelsat satellites. Far from helping PanAmSat through the coordination process, Intelsat, a U.S.-created organization headed by a U.S.-appointed director general, has consistently thwarted the efforts of the U.S. and PanAmSat to get its system operational. As the discussions carried on through 1986, the relationship between the two sides has deteriorated. At this time, no resolution to the problem is in sight. This situation is obviously of importance to Broadcasting's editors, who devoted twenty-two articles to the subject during the time of this study.

The tragic explosion of the Challenger space shuttle was also a story of importance to the magazine, not only because of the loss of life, but because of the severe setback dealt to the nation's space program. As discussed
previously, a new generation of Ku-band satellites, more powerful than earlier C-band satellites, were being rushed into space to keep pace with the growing demand for transponders. It is the Ku-band satellite, which can utilize much smaller receiving dishes, that enabled many local stations to afford satellite equipment. The failure of the Challenger, and the later failure of an Atlas rocket to boost additional satellites into orbit may lead to a shortage of transponders. With the American space program on hold, RCA, Hughes, and other satellite manufacturers have had to arrange for carriage on European and Chinese rockets, which have had failures of their own. These failures, and the resulting increases in satellite insurance coverage, may slow down this rapidly expanding field.

As recently as five years ago, the average local television manager would have given little thought to utilizing satellite equipment at his station. Now it has become an integral part of station technology, helping to reduce or eliminate expensive transmissions by terrestrial microwave or telephone lines. Syndicated programing can be brought to the station simply by activating a video recorder at a prearranged time. Network feeds can be received with greater signal quality and less susceptibility to interference. As satellite technology continues to expand, the local manager (with his chief engineer) will find himself increasingly involved with the new possibilities
brought to earth by the satellite.

12. Technology- In 1884, German inventor Paul Nipkow developed the first workable television system. Although Nipkow's television proved to be too primitive for widespread use, he helped set in motion a chain of events that have led to our present day television industry. Television thrives on its technological base, and it is through new innovations that the medium expands the range of information and entertainment it brings into the home.

Although Broadcasting is not a technical magazine, it keeps a close watch on developments in television technology. Forty-three articles on this subject were published in the year under study, most of them concerning technical breakthroughs in the television marketplace. The wise local manager keeps himself apprised of these developments. He is aware of the trickle-down theory at work; that new equipment used by the networks today will probably be used by his station tomorrow.

Several new devices or processes have appeared on the scene in the past year. One of these, SNG, has been previously discussed. Another is the development of a computer process that can colorize black and white films and videotapes. Already, such old favorites as "Topper," "The Maltese Falcon," and "Yankee Doodle Dandy" have undergone the transformation to color, although opinion is
still divided on the artistic merits of the process.

Among other new developments, new one-half inch tape formats, such as Panasonic's MII and Sony's Betacam are battling for prominence as videotape continues to grow more compact. A new FM transmission system, FMX, may greatly expand the coverage area of stereo FM signals. A virtually foolproof scrambling system, Videocipher II, has enabled the cable industry and the networks to protect their satellite feeds from unauthorized interception.

While these are important developments in television hardware, the editors of Broadcasting have focused their attention on three technical innovations in the industry. The first of these is the growth of stereo television. In reality, stereo television is not a new technology. The audio portion of the television signal has always been broadcast in FM, which can deliver a quality stereo signal. What has held back the process has been a lack of enthusiasm by consumers, coupled with a lack of stereo programing. The birth of stereo television can best be explained by a quote from the magazine:

TV receiver manufacturers are eager to see [the] advent of [the] new service. It means that they will be able to sell sets with stereo capability as well as a set-top adapter to upgrade existing sets for stereo reception.13

Near the end of 1986 the number of television stations with stereo had grown to over three hundred. Television
manufacturers have projected sales of 2.8 million stereo-ready sets by early 1987. This poses a problem for the local manager. Should he embrace stereo, anticipating consumer demand at some future point, or should he wait to see if the whole idea is merely a sales ploy to sell more sets? The stakes can be high. Upgrading a transmitter for stereo can cost over $100,000. In addition, another $100,000 can be spent to adapt the signal path through the studio. A new audio board may be required as well. Misgauging the demand for stereo could be an expensive mistake.

The second technical development of concern is just now entering the marketplace. It is a new type of videotape recorder utilizing a digital format, and is widely considered a great improvement over current analog machines. When a world agreement on a digital component recording standard was reached in 1986, it seemed to ensure an instant market for a new generation of digital component recorders. The industry's plans went awry, however, when Ampex, a leading manufacturer of videotape machines, announced its plans for a digital composite machine, one that did not conform to the agreed-upon component standards.

It should be explained here that component machines differ from composite machines in that component circuitry separates luminance (monochrome) and chrominance (color)
into discrete signals, unlike Ampex's composite encoding method, which maintains one luminance-chrominance signal. The result is that the two systems are incompatible. This presents another dilemma to the local manager. Both the component and composite machines are intended primarily for use as automated cart machines, to replace the previous generation of cart machines sold by Ampex and RCA. As station maintenance engineers across the country are discovering, these old cart machines are beginning to wear down, thus increasing the cost of keeping them on the air. They also utilize two-inch quad videotape, which produces a lesser quality signal than the one-half inch helical scan process utilized by the digital machines.

The bottom line for the local manager is whether to continue to spend money maintaining the old cart machines or spend $250,000 or more on new digital machines. A further question is whether to buy a component or a composite machine. Although the manager will have to rely on the expertise of the chief engineer in making this decision, he is still responsible for the outlay of a large sum of money. If the manager makes the wrong choice the blame will fall on his shoulders.

The third development in technology is one that the manager will not have to concern himself with in the near future, but nevertheless is a breakthrough of tremendous proportions. This breakthrough is high-definition
television (HDTV), a revolutionary improvement over current television pictures. The present NTSC system utilizes a picture consisting of 525 lines with a 4:3 aspect ratio. HDTV uses 1,125 lines and a 16:9 aspect ratio, resulting in a picture almost identical to that of 35mm film, a great leap in quality. It represents the ultimate in television technology. It is also completely incompatible with current transmitters, assigned bandwidths, nearly all video equipment and all home sets.

HDTV is mentioned here to put things in perspective. While the manager of today must make decisions regarding the expenditure of $250,000 for a digital cart machine or $200,000 for a stereo upgrade, the manager of the future will have to make a similar decision. Except that this time, his decision will regard the elimination of nearly every piece of video equipment in the station and the expenditure of many millions of dollars.

13. Cable— In little more than a decade, cable television has risen from its birth as an elaborate antenna system to become a major force among the electronic media. There is a belief among many television critics that cable will eventually put the networks out of business. These critics point to cable's ability to deliver specialized audiences with its sports, movie, women's and news channels, all having the same appeal for advertisers as do specialized
magazines. It is also said that cable is, or at least will be, a medium of quality, with programs superior to the network's offerings designed to appeal to the lowest common denominator.

It is true that the networks' share of the prime time audience has dropped since cable arrived on the scene. For the 1974-75 season the three networks claimed a 93 percent share of the prime time audience. By the 1980-81 season their share had dropped to 83 percent. Projections for the 1989-90 season show a further drop in the networks' share to 70 percent. On the surface this presents a bleak future for the networks. It is actually not bleak at all, if one takes into account projections of an increase in television households from 81.5 million today to 100 million by 1990, coupled with a projected 10 percent rise in viewing levels as a result of the increased viewing options available to the public. Should these projections hold true, the networks will actually increase their total audience despite a lower share of total viewing.\(^4\) Still, with cable penetration estimated to reach 60 percent of the nation's homes by the end of the decade, both network and local television will find themselves faced with tough competition.

As a relative newcomer to the scene, cable does not enjoy equal status with broadcast television in the pages of *Broadcasting*. The magazine's primary target is still
those readers working in the broadcast medium, as evidenced by the smaller number of articles devoted to cable. Were not Broadcasting a general interest publication of the electronic media, it might not publish much about cable at all.

As it was, the majority of the cable articles concerned the controversy over the must-carry issue, which came about as the result of a U.S. Court of Appeals decision that must-carry was unconstitutional. (The details of the must-carry decision are described in the "regulation" category.) The must-carry articles in this category concern the battle between the broadcast and cable interests, with one side wanting to do away with must-carry altogether and the opposition wanting to keep as much of it as possible. The series of must-carry articles describe an evolutionary process, from both sides hurling charges and threats at each other, to the lengthy negotiations on a compromise agreement, to the final (perhaps) must-carry rules adopted by the FCC.

Other items of importance on cable's agenda, as reported in Broadcasting, include the following: the emergence of pay-per-view services as a response by the cable industry to the declining number of pay-cable subscribers; NBC's abortive attempt to establish a cable news service; the demise of the Council for Cable Information; and the issue of scrambling satellite feeds. Many of the other cable
articles, including must-carry, the Preferred decision, and cable programing efforts have been described in other categories.

For the local television manager, the information in this category is not of pressing interest, except for the must-carry issue. It would be unwise, however, to ignore cable completely. It always helps to know who the competition is.

14. Radio—Except for those few managers left at grandfathered radio-television combinations, radio is not high on the local television manager's priority list. The manager may listen to the radio, he may be aware of it as a competing medium, but it is not his domain. Radio is included in this content analysis because it is part of Broadcasting's coverage, and it is a goal of this project to examine the entire range of media included in the magazine.

Although Broadcasting is a general interest media publication, radio receives much less space than television. Only 2.9 percent of the articles in the analysis pertained strictly to the affairs of radio. There could be several reasons for this. For one, television has long since eclipsed radio as the predominate source of information and entertainment in this country. The large number of television and cable channels available draw audiences away
from radio. Another reason is that television is still an evolving medium, creating news about itself with such developments as cable, satellites, teletext and HDTV.

Perhaps the most important reason for television's superior coverage in the magazine is that television is where most of the revenue flows. While radio, on the whole, is a financially healthy medium, it is television that attracts the bulk of the advertising dollars. Because of the opportunities available in television it attracts the best in talent, managerial expertise and technical knowledge. Television's success feeds upon itself, and because it has become such an important part of everyday life it naturally receives more attention.

Radio still remains an attractive medium, with many of the developments that occur in television echoed in radio. Like television, radio makes extensive use of satellites, particularly in nonwired networks. Radio also makes use of the new digital technologies. Several articles in Broadcasting relate radio's newest technical developments. In 1986 the FCC authorized a 100 kilohertz expansion of the AM band, to 1705 kilohertz. AM stereo continued to spread across the country, although its growth has been hampered by the competition between two incompatible systems, Kahn and C-QUAM. As mentioned previously, a new FM transmission system, FMX, may extend the coverage area of FM stereo stations.
The most significant radio story reported by Broadcasting was not one of good news. Several articles in this category follow the continued decline, in both revenue and listeners, of the AM band. In 1973 AM held 70 percent of the radio audience to 30 percent for FM. In 1985 these positions were reversed as AM’s share dropped to 30 percent. If AM was to continue its present rate of decline it would have zero listeners by the mid-1990s.15 This, of course, will not happen, but the ills of AM and the attempts by the industry to halt this trend continue to be the major radio story.

15. Ratings- The idea of using ratings to gauge the success of television programs has long been a subject of controversy. One side argues that ratings are a necessary tool, thereby giving stations the ability to evaluate the size of their audience and advertisers an indication of the reach of their messages. The opposing view says that ratings are unnecessary and that programs should be judged on their artistic merits. Since it is the advertisers who foot the bill for the programing, the question becomes moot. Most likely, ratings are here to stay.

In Broadcasting, the subjects of ratings and programing are usually intertwined. Many of the articles containing ratings information also discuss programing. In the majority of these cases, the programing aspects of the
articles were judged to be the primary theme, with the ratings numbers as a subtheme. This accounts for the relatively low number of ratings articles (thirty-six) in the content analysis.

The articles in this category describe the idea of the ratings themselves, and not the ratings of any particular program. Most of the articles concern the activities of the leading ratings firms, Arbitron and Nielsen. As reported in Broadcasting, the Nielsen service is currently embroiled in a dispute over its audience measurement system. The measurement technique now employed by Nielsen uses a diary system, in which viewers write down the programs they watch and the stations on which they appear. Combined with this is a meter that makes an electronic recording of when the television is turned on— and if so, to which channel it is tuned. In order to gain greater accuracy from its viewer sample, Nielsen has proposed to use a "people meter," which measures individual viewing as opposed to household viewing. Measuring individual viewing will give the Nielsen researchers greater insight into the demographic components of the audience as well as a more accurate way to measure audience totals.

The networks are willing to fund research on the people meter, but a controversy is brewing over the accuracy of the device. There is a growing feeling among those in the advertising community that the people meter is not only more
accurate than the present diary-meter system, but will show that the networks have been receiving inflated audience figures. Should this prove to be true, the networks stand to lose many millions of dollars as a result of reduced ratings, which will allow advertisers to pay lower rates. At this time, the networks, who supply the bulk of Nielsen's revenues, have been able to postpone development of the device.

Ratings are just as important to the local television manager as they are to the networks. All television markets are measured during the sweeps periods in November, February, May, and July. Some markets are also measured during October, January, and March. The largest markets, New York, Chicago, Los Angeles, Philadelphia and San Francisco are measured fifty-two weeks a year. Since these ratings figures determine the prices that stations can charge advertisers, it is vital that the local manager and his sales staff be well-informed on their station's ratings status. The desire for ratings information is such that many stations subscribe to both the Nielsen and Arbitron services.

The importance of local ratings is shown in periodic articles in Broadcasting on Arbitron ADI disputes. (An ADI is defined as "an area that consists of Arbitron's sampling units in which the home market commercial stations and satellite stations reported in combination with them
received a preponderance of total viewing hours."

In June, 1986, the Anniston Broadcasting Co. sued Arbitron for $10 million in punitive and compensatory damages in an effort to prevent Arbitron from denying the company its ADI for WJSU in Anniston, Alabama. Arbitron had proposed to transfer Calhoun County, the only county within the ADI, to Birmingham, Alabama's ADI. The fate of the case is not yet known, but it shows the importance attached to ratings and ratings methodology. It is not unusual for one station in a market to sue a competitor, charging that the competing station had been prompting ratings families on how they should fill our their ratings diaries.

Many local television managers consider ratings figures as the primary indication of the station's success. Higher ratings bring in greater revenues—lower ratings may cost the manager his job. More than one station has been known to break out champagne when the latest ratings books showed an increase in audience shares. Ratings may not be the best way to judge television programing, but they are a necessary evil. To the local manager the ratings books are among the most important books he will read.

16. International—As the medium of television continues to spread around the world, it is becoming more important for television executives to keep abreast of international developments. Broadcasting, while allotting only 2.6
percent of its articles to international coverage, still manages to run a fairly steady stream of articles on television developments in other countries.

One series of international articles that strike close to home concern the efforts of the Canadian government to "de-Americanize" its television networks. A government report, entitled "Let's Do It," reflects the concern of Canadian officials that the country is becoming swamped with American culture. According to the report, 72 percent of English-language programming in Canada is American-produced, and that Canadians watch forty-five hours of American programming for every one hour of Canadian programming.17

The report recommends that the government-owned Canadian Broadcasting Corporation (CBC) eliminate virtually all American programming by the start of the 1987 season, leaving a program content that would be at least 90 percent Canadian. This plan was not to apply to the several smaller private networks serving the country, who are currently required to devote 50 percent of prime time and 60 percent of the total broadcast day to Canadian programs. A few months after the report was issued, however, the chairman of the Canadian Radio-Television and Telecommunications Commission warned the private networks that they would have to increase the amount and quality of their Canadian programming or face a tough battle when their licenses came up for renewal.
In Europe, America's push for deregulation of the electronic media is being emulated by several countries, most notably Britain, West Germany, Italy, and France. Combined with the use of satellites, this has resulted in the birth of new television networks along with the privatizing of formerly government-controlled networks. To receive feeds from these new networks, privately-owned stations are springing up across western Europe. In addition, private cable systems are expanding in Britain, West Germany, the Netherlands, and Belgium.

A service with even greater potential is the satellite-fed pan-European network, Sky Channel, currently seen over cable systems in 5.5 million homes in a dozen European countries. It is estimated that satellite networks such as Sky Channel could feed programing to almost all of the twenty-seven nations in Europe, creating the densest broadcasting region in the world. What is keeping Sky Channel and other prospective pan-European networks from this goal is the worry over the potential drain of national advertising revenue to other countries' commercial channels, combined with the loss of individual cultural values through an onslaught of foreign broadcasts. Part of this latter fear is that Sky Channel feeds its American-dominated programing in English, with the likelihood that other European satellite services would do the same. In other words, the Europeans are taking the same attitude toward
American culture as the Canadians.

The efforts to deregulate European television and a heavy reliance on American programming will greatly change television in the western world. At this time, the developments in Canada and Europe are mostly of interest to program producers and distributors. They are, of course, unhappy about the Canadian situation, but can look forward to new and profitable markets in Europe. For now, the local television manager can only stand by and watch these developments. As more local stations build satellite uplink facilities, however, the local manager may one day be a more active participant in world broadcasting.

17. Interview—During the course of this study, Broadcasting ran fifteen lengthy interviews with men from different sectors of the fifth estate. This category is more closely related to "Monday Memo" or the editorial page than to the other categories in the content analysis. These interviews are worthwhile because they give the reader of the magazine a chance to understand the viewpoints of top managers throughout the industry.

Some of those interviewed include Roger Rice, president of the Television Bureau of Advertising; Roone Arledge, president of ABC News; Brian Lamb, chairman of C-SPAN; former CBS News president Fred Friendly; Joseph Flaherty, vice president and general manager of engineering and
development for CBS; and Alfred Sixes, head of the National Telecommunications and Information Administration. All of the men interviewed are from some facet of the television industry.

The topics covered by some of the men interviewed included WTBS president Ted Turner speaking out on his acquisition of MGM and the importance of new programing in the future of cable. John Sie, senior vice president of TeleCommunications Inc., spoke on the movement to form a cable program consortium and on the marketing problems associated with backyard earth stations. NBC chairman Grant Tinker elaborated on his management philosophy and the recent success of his network. Foremost on the mind of NCTA president Jim Mooney was the must-carry compromise and the future growth potential of the cable industry.

Interestingly, the interview that drew the most response in Broadcasting's letters column was with David C. Adams, a former chairman of NBC. Adams was interviewed on the occasion of NBC's sixtieth anniversary, and his recollections of the early years of network television drew many letters of praise, not only from those who served along with Adams in television's infancy, but from those who enjoyed learning about the management practices then in vogue.

Like the "Monday Memo" and "Editorials" categories, these interviews are a good source of management philosophy
from successful television leaders. The local manager, should he aspire to a network position or just perform more effectively in his present situation, should be able to gain some valuable insights from these men.

Summary

It was mentioned earlier that the television industry has come to be seen by the financial community as an attractive investment opportunity. The content analysis of Broadcasting makes this evident, as the number of articles in the "business" category is significantly larger than any of the other categories. The second-largest category, "programming," with its emphasis on the ratings success of various program formats and its attention to the success of the networks in attracting viewers also shows the magazine's attention to the bottom line, since higher ratings usually translate into higher revenues.

The fact that television is closely interconnected with other societal institutions is shown by the frequency of articles in the "regulation," "legislation," and "law" categories. Despite the FCC's efforts in deregulation, the large number of articles on the activities of this organization is evidence that Broadcasting's editors feel that it is necessary to pay close attention to regulatory activities. Likewise, the activities of legislative bodies and the judicial system are seen as items of importance on
the magazine's agenda. It was seen in such controversies as the Fairness Doctrine dispute and the battle over must-carry rules that these official bodies can have a direct impact on how television stations conduct their operations.
CHAPTER FOUR

SURVEY METHODOLOGY AND RESULTS

Introduction

The agenda of Broadcasting has been discovered through a content analysis of the magazine. Now, the agenda of the local television managers must also be discovered, but by utilizing a different methodology. For the purposes of this project, the most appropriate method is the survey. By mailing a large number of surveys to local managers across the country, the opportunity will be created for the managers to create a collective agenda which can then be compared to that of the magazine.

Methodology of the survey

As noted previously, the questions in the survey were derived from the primary themes of interest in each of the seventeen categories. From the categories, thirty-four questions were developed for use in the survey. The following is a brief explanation of each of the questions in the survey, describing the rationale behind each question. A reproduction of the survey can be found in Appendix A.
Question #1: Do you read Broadcasting magazine on a regular basis?

In order to determine whether any agenda-setting function is performed by Broadcasting, it must first be determined how many of the managers are regular readers of the magazine.

Question #2: How long have you served in your present position?

This question stems from the primary theme of the "business" category, the large number of takeovers, mergers and sales occurring among television stations. One of the major impacts on the local manager in this kind of situation concerns his job security. Changes in ownership often result in managerial changes as well. Even if the manager remains in his job after a change in ownership, he may feel pressure to generate more profits in order to alleviate the new ownership's debt burden. The object of this question, then, is to track the tenure of the managers, to see how much they have been affected by the large number of station turnovers.

Question #3: How many television stations are owned by the owners of your station?

This question also refers to the shifts in ownership occurring in the television industry. According to Broadcasting, many groups, spurred by the FCC's loosening of ownership restrictions, have been buying as many stations as they can afford. The responses to this question will
give some idea of the average size of a television group, as well as how many single-station owners still exist.

Question #4: Do you believe that the present ownership limit of 12 television stations should be increased or decreased?

The FCC at one point had decided to eliminate all ownership restrictions regarding television stations. This, however, led to an outcry against such a move by both those inside and outside of the industry. The FCC reconsidered its plans and arrived at the present ownership limit of twelve stations. The general tone of the articles in Broadcasting concerning the ownership limit is favorable. The idea behind this question, then, is to see how the local managers feel about the ownership restrictions. Are they in favor of larger station groups or a return to smaller groups?

Question #5: If you are a network affiliate, how would you describe your interest in your network's ratings standing?

This question is from the "programing" category, and seeks to find out how important the networks' successes and failures are to their affiliates. Do the affiliates believe they are a part of a team effort, or are they only concerned with the economic benefits they can derive from the networks? Since Broadcasting places much emphasis on network programing schemes, it is important to know how the affiliates feel.
Question #6: Which of the choices listed below most influences your station in the purchase of syndicated programing? (Check one only.)

[Trade shows/ Information and demo reels from syndication services/ Trade magazines/ Recommendation from national sales representative]

With the increase in the number of independent stations and the emphasis placed by affiliates on such time periods as prime access and late fringe, the syndicated program has become very important as a source of revenue. Broadcasting gives ample space to the offerings of syndicators and derives quite a bit of its income from advertisements for syndicated programs. The main goal of the question is to see how many managers check the "trade magazine" response. Is Broadcasting, as the leading trade magazine, an important source of information for buyers of these shows, or do the managers get this kind of information from other sources?

Question #7: Which type of programing would you say generates the most comment from your viewers?

[Game shows/ News/ Sitcoms/ Documentaries/ Dramas/ Children's programs/ No significant comment from viewers]

Another question from the "programing" category, this is in response to the numerous articles published by the magazine on the effects of various programs. Criticizing television programing is a major pastime for many groups, and it will be interesting to note which programs garner the most feedback.
Question #8: Which professional associations do you belong to?

[NATPE/ NAB/ BFMA/ None/ Other]

Broadcasting devotes a great deal of space to news concerning various television organizations, as shown in the "associations" category. This question seeks to discover how many managers belong to those organizations, and, just as importantly, how many managers choose not to belong to these groups.

Question #9: Which, if any, trade conventions do you attend?

Trade conventions also receive much coverage from Broadcasting, including special issues dedicated to the NAB, NATPE, and INTV shows. This question endeavors to learn whether this special coverage is warranted, as shown by the number of managers who actually attend the conventions.

Question #10: Do you think that the Fairness Doctrine should be eliminated?

This question addresses one of the most controversial issues of broadcast regulation and represents one of the most pressing problems facing the FCC. The commission and the RTNDA are currently waging a battle against the doctrine, as regularly reported in the magazine. This question seeks the views of the local managers on this controversy: Do they agree or disagree with the FCC's push to abolish the doctrine?
Question #11: In general, do you approve or disapprove of the FCC's deregulation efforts?

The previous question on the Fairness Doctrine concerned just one example of the FCC's efforts in deregulating the television industry. This question asks an opinion on the whole range of deregulation. Since deregulation was a primary theme of the "regulation" category, it is important to know how the managers feel on this issue.

Question #12: Has your station been affected in any way by the U.S. Court of Appeals ruling declaring the must-carry rules unconstitutional?

The must-carry decision is another tough issue facing the FCC, and an issue of great importance to Broadcasting. Many articles in the magazine contain horror stories, either real or potential, on what will happen to local television stations without must-carry protection against local cable systems. It is important to know how many managers have actually been affected by the demise of must-carry.

Question #13: Do you support the must-carry compromise developed by the FCC?

The must-carry decision left the relationship between broadcast and cable interests in chaos, as shown in a series of articles in Broadcasting. Both sides agreed to have the FCC develop a compromise ruling, but once the FCC released its decision, the uproar began anew. How the
managers feel about the compromise is important to this project.

Question #14: Is your station equipped for satellite news gathering?

The development of SNG was the main ongoing story of interest in the "journalism" category, receiving much coverage in the magazine. The point here is simply to discover how many stations actually have SNG facilities.

Question #15: If you answered "No," do you future plans call for the implementation of SNG equipment?

This question, along with the previous question, seeks to find out the importance of SNG to the local manager. The frequent coverage of SNG in the magazine makes it seem very important, but that is the magazine's agenda. The response to this question will indicate to what extent the managers agree or disagree on SNG as a vital news gathering tool.

Question #16: In your opinion, how would you rate the effect on your station of laws pertaining to broadcasting passed in the past year by the U.S. Congress?

[Great effect/ Moderate effect/ Little effect]

Broadcasting devotes a fair amount of space to Congressional activities, but in the "legislation" category, there were no articles that had a direct impact on the local manager or his station. Since this situation removes the possibility of a specific inquiry, a more general question was devised to gauge the managers' feelings toward the
actions of Congress.

Question #17: Has your station been involved in a libel suit in the past year?

A situation similar to "legislation" occurs in the "law" category, where most of the articles did not directly affect the local manager. One theme, however, did concern an event that could occur on the local level, that of libel suits. The libel suits faced by the networks received much publicity in the magazine. The purpose of this question is to determine if the same situation exists at the local level.

Question #18: If you answered "Yes" to the previous question, did you win or lose the suit?

This is simply a follow-up to the previous question. According to the articles published in Broadcasting, the television industry has generally been successful in fighting libel suits. Here it is sought to confirm that idea.

Question #19: Does your station use barter-syndication programs?

One of the primary themes in the "advertising" category concerned the growth in the use of barter-syndication programs. The goal here is to try and trace the use of these programs by the response of the managers to this question, thereby confirming or denying Broadcasting's emphasis on this topic.
Question #20: Does your station allow advertisers to run 15-second spots?

This is another topic of note in the "advertising" category, and one which has inspired a rather heated debate. Advertisers, wishing to economize, have been pushing for the acceptance of fifteen-second commercials, while broadcasters, wishing to avoid commercial clutter, have been resisting their use, according to the articles published in Broadcasting. This question will ascertain how many managers have allowed or rejected the fifteen-second commercials.

Question #21: Do you read the "Monday Memo" column in Broadcasting magazine?

It was noted earlier that it would be interesting to track the "Monday Memo" column, since it represented the views of top professionals in the industry. What is not known is how much attention is paid to this column. The responses to this question should provide the answer.

Question #22: If you answered "Yes" to the previous question, do you find the views of the "Monday Memo" guest columnists helpful in managing your station?

Having discovered how many people read "Monday Memo," it is equally important to learn whether the views expressed in the column have any effect on the job performance of the managers.

Question #23: Do you read the editorial page of Broadcasting magazine?
This question has the same purpose as Question #22, except in this case, to discover how many managers read Broadcasting's editorials.

Question #24: In general, do you agree or disagree with the editorial comments of the magazine?

As the leading magazine of the television industry, Broadcasting has a long history as one of the major voices of the fifth estate. It will interesting to see whether this voice, or agenda, is shared by the managers.

Question #25: Does your station use satellite dishes to downlink programing?

In the "satellite" category, the main story of interest for local stations was the increased use of satellite receivers. Broadcasting has published many stories on satellites, including a regular column, "Satellite Footprints." This question will document how widespread the use of satellite technology has grown. Are there enough receivers in use to warrant the magazine's coverage, or is it a technology restricted to a few large stations?

Question #26: Is your station equipped to broadcast in stereo?

The goal of this question, like the one before it, is to determine whether Broadcasting's emphasis on technology is reflected in the use of that technology by local stations. Stereo television has received much coverage in the magazine, and it will be interesting to
track its actual use.

**Question #27:** If not, do your future plans call for the installation of stereo equipment?

Many of the articles in the magazine mention the pressure, real or imagined, on stations to convert their operations to stereo. The response to this question will give some indication of how the managers feel about the pressure to join the ranks of stereo-equipped facilities.

**Question #28:** Has your station been refused carriage on a cable system because of the recent must-carry ruling?

The details surrounding the must-carry ruling and the subsequent battle for a compromise among the broadcast and cable interests are covered in other categories. This question, from the "cable" category, intends to discover, amid all the proclamations of doom by television interests, how many stations have actually been affected by the absence of must-carry.

**Question #29:** How would you rate radio as a competitive force in your market?

Since the activities of radio received little attention in *Broadcasting*, the "radio" category is probably of little concern to the local television managers, unless radio is viewed as a threat to their potential audience. By asking the managers their opinion of radio as a competitor in the battle to attract an audience, some indication can be given as to whether the magazine's small amount of radio
coverage is justified.

Question #30: What ratings service(s) does your station subscribe to?

This question, from the "ratings" category, simply seeks to discover how many stations subscribe to a ratings service, and perhaps more importantly, how many stations feel that ratings are so vital as a source of information that they subscribe to more than one of the available services.

Question #31: Do you support the use of "people meters" by the Nielsen service as a substitute for the present diary method of ratings measurement?

This question focuses on a more specific aspect of ratings, the use of the people meter. This device, along with measurement techniques in general, was one of the primary themes of the "ratings" category. According to Broadcasting, the television industry is working to postpone the introduction of the people meter for fear that it will show that television audiences are actually smaller than has been previously measured with the diary/meter system. Advertisers want to use the people meter because they believe they will save money if it can be proven that audience figures have been inflated. The responses to this question will show whether or not television managers are against the new measurement technique.

Question #32: How would you describe your interest in television developments in other countries?
This question is derived from the "international" category, one of the least popular categories in the survey. By asking this question it can be determined whether Broadcasting's lack of emphasis on international developments is justified by a lack of interest from the managers.

Question #33: Do you read the periodic interviews published in Broadcasting magazine?

The least popular category in the survey was "interviews." This question endeavors to find out if these interviews are popular reading among the local managers.

Question #34: If so, do you feel that the views of the people interviewed help you in your job?

Since the interviews are often with people at the very top of the television industry, it will be interesting to note if the success of the interviewees can be put to use by the local managers, or simply glossed over.

Response to the survey

Of the 300 surveys mailed to local television managers across the country, 185 were returned, a response rate of 62 percent. For various reasons eight of the returned surveys were found to be unusable, leaving a net total of 177 surveys on which to base the results of this study. Of the useable surveys, 111 were received from network affiliates, forty-one from independent stations, and twenty-
five from PBS stations.

The analysis of the local managers' responses will be conducted in two ways. First, the total response to each question in the survey will be compared to Broadcasting's coverage of the topic from which the question was derived. In addition, a comparison will be made of the responses from the network affiliates, the independents, and the PBS stations in order to determine whether any of these groups are more likely to agree or disagree with Broadcasting's agenda.

Results and analysis of the survey

Question #1 asked the managers if they read Broadcasting on a regular basis. The responses to this question would seem to vindicate the choice of Broadcasting as the most-read magazine among local managers. An overall response of 94 percent indicates that the magazine has the potential to be an agenda-setting medium (see table 3). The lower level of readership among PBS managers could stem from the fact that Broadcasting is geared mainly toward commercial stations and commercial programming. In fairness, it must be pointed out that several managers, who, while indicating that they were regular readers of Broadcasting, believed Electronic Media to be a better trade publication. The goal of this question, however, to establish the reach of Broadcasting
among local managers, has been achieved.

TABLE 3. -- Do you read Broadcasting magazine on a regular basis?

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total:</td>
<td>167</td>
<td>10</td>
</tr>
<tr>
<td>Affiliates:</td>
<td>106 (95%)</td>
<td>5 (5%)</td>
</tr>
<tr>
<td>Independents:</td>
<td>40 (98%)</td>
<td>1 (2%)</td>
</tr>
<tr>
<td>PBS:</td>
<td>21 (84%)</td>
<td>4 (16%)</td>
</tr>
</tbody>
</table>

The object of Question #2, which asked the managers how long they had served in their present management position, was to determine the effect of the turbulent nature of television station transactions on the longevity of the local managers. As was noted earlier, new ownership can result in changes in local management, which would have an effect on the length of time a manager spends at a particular station. In comparison with other types of businesses the term of employment of a local television manager could be considered somewhat short, with the average managerial stint lasting slightly less than six years, ranging from a low of just four months on the job to a high of more than twenty-six years (see table 4).

The higher average at the PBS stations is probably

TABLE 4. -- How long have you served in your present position?

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<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total:</td>
<td>5.95 years</td>
</tr>
<tr>
<td>Affiliates:</td>
<td>6.44 years</td>
</tr>
<tr>
<td>Independents:</td>
<td>3.91 years</td>
</tr>
<tr>
<td>PBS:</td>
<td>7.12 years</td>
</tr>
</tbody>
</table>
attributable to the noncompetitive nature of the stations, as opposed to commercial stations, where the competitive atmosphere often leads to higher management turnover. It is interesting to note that responding to this survey was one of the last acts performed as a manager by Joseph T. Laughlin of WGN-TV in Chicago. The day after his survey was returned, Laughlin quit his post as general manager, stating that he had to "quit this job before it kills me."¹

The low average at the independent stations is possibly a result of the large number of new independents that have gone on the air in the past few years. The managers of these stations have not yet had the opportunity to spend longer periods of time at a particular station.

The third question on the survey, which asked the managers how many stations were owned by the owners of their station, was posed in response to the many changes in the ownership of stations following the FCC's recent loosening of ownership restrictions. More than 75 percent of the respondents work for groups with multiple station ownership, making it appear as though the single-station owner may soon be a thing of the past (see table 5). Omitting the figures from the PBS stations reveals that the average ownership is nearly four stations, a figure which will no doubt continue to rise in the future if the FCC continues its policy of deregulation.
TABLE 5.-- How many television stations are owned by the owners of your station?

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<th></th>
<th></th>
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</thead>
<tbody>
<tr>
<td><strong>Total:</strong></td>
<td>625</td>
<td>3.53</td>
<td></td>
</tr>
<tr>
<td><strong>Affiliates:</strong></td>
<td>447</td>
<td>4.03</td>
<td></td>
</tr>
<tr>
<td><strong>Independents:</strong></td>
<td>136</td>
<td>3.31</td>
<td></td>
</tr>
<tr>
<td><strong>PBS:</strong></td>
<td>42</td>
<td>1.68</td>
<td></td>
</tr>
</tbody>
</table>

Question #4 asked the managers how they felt regarding the present ownership limit of twelve television stations—should the limit be increased or decreased? Unfortunately, this question was flawed by the omission of a "remain the same" response opportunity, although this does not eliminate the value of the responses as an important source of information. In fact, a third of the respondents elected to write in a "remain the same" response of their own volition, indicating that they had some strength of feeling on this subject (see table 6). It could also be supposed that many of the "no responses" also shared this feeling but did not choose to write in a response in order

TABLE 6.-- Do you believe that the present ownership limit of 12 television stations should be increased or decreased?

<table>
<thead>
<tr>
<th></th>
<th>Increased</th>
<th>Decreased</th>
<th>Same</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total:</strong></td>
<td>50 (28%)</td>
<td>43 (24%)</td>
<td>57 (32%)</td>
</tr>
<tr>
<td><strong>Affiliates:</strong></td>
<td>38 (34%)</td>
<td>21 (19%)</td>
<td>35 (32%)</td>
</tr>
<tr>
<td><strong>Independents:</strong></td>
<td>11 (27%)</td>
<td>9 (22%)</td>
<td>15 (37%)</td>
</tr>
<tr>
<td><strong>PBS:</strong></td>
<td>1 (4%)</td>
<td>13 (52%)</td>
<td>7 (28%)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>No response</th>
<th>Uncertain</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total:</strong></td>
<td>21 (12%)</td>
<td>6 (3%)</td>
</tr>
<tr>
<td><strong>Affiliates:</strong></td>
<td>13 (12%)</td>
<td>4 (4%)</td>
</tr>
<tr>
<td><strong>Independents:</strong></td>
<td>5 (12%)</td>
<td>1 (2%)</td>
</tr>
<tr>
<td><strong>PBS:</strong></td>
<td>3 (12%)</td>
<td>1 (4%)</td>
</tr>
</tbody>
</table>
to stay within the confines of the response opportunities that were provided in the survey.

This question is the first in the survey in which Broadcasting's agenda-setting power can be tested. The magazine has consistently lauded, through its editorials and regular coverage, the FCC's change of ownership restrictions. The responses from the managers do not indicate any great support for the magazine's position, with the "increased," "decreased" and "same" responses receiving fairly equal support. The fact that nearly a fourth of the respondents chose "decreased" and a third chose "same" shows that Broadcasting's gung-ho attitude on this subject is not universally shared by its readers. Due to the flaw in the response opportunity, however, it is difficult to make any further assumptions on this issue.

Question #5 asked those managers of stations with a network affiliation how they would best describe their interest in their network's ratings standing (the response choices were "Great interest," "Moderate interest," or "Little interest"). For this question only the network affiliates and the PBS stations were counted being affiliated with any kind of network. Although some of the independent managers included themselves as affiliates of the Fox Broadcasting Company, it is not considered here to be a true network due to its lack of a full slate of
scheduled programing.

Among the network affiliates, an overwhelming majority (96 percent) indicated that they took a great interest in their network's ratings standing (see table 7). The two managers who indicated little interest were both from small market stations with dual network affiliation. The PBS managers felt less strongly about the ratings standing of the PBS network, most obviously for the reason that PBS does not ordinarily produce large enough audience figures to be included in the national program rankings. Ratings are also of much less importance to educational affiliates, who tend to be concerned more with reaching specific target audiences.

<table>
<thead>
<tr>
<th></th>
<th>Great interest (X%</th>
<th>Moderate interest (X%)</th>
<th>Little interest (X%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>114 (64%)</td>
<td>15 (8%)</td>
<td>4 (2%)</td>
</tr>
<tr>
<td>Affiliates</td>
<td>107 (96%)</td>
<td>2 (2%)</td>
<td>2 (2%)</td>
</tr>
<tr>
<td>Independents</td>
<td>0 (0%)</td>
<td>0 (0%)</td>
<td>0 (0%)</td>
</tr>
<tr>
<td>PBS</td>
<td>7 (28%)</td>
<td>13 (52%)</td>
<td>2 (8%)</td>
</tr>
</tbody>
</table>

Taking into account the high interest level among the network affiliates, it appears that Broadcasting is
justified in its thorough coverage of network ratings and the programing machinations designed to attract higher ratings. Whether the high level of interest is created by the magazine's coverage or whether the interest is inherent in the managers cannot be proven from this question. It is plausible that Broadcasting has taken the existent interest and heightened it through continuous articles trumpeting the ratings success of a particular network.

In order to discover the most important influences on local stations concerning the selection of syndicated programing, Question #6 asked the managers to select one source as most important in determining program selection. Although the managers were asked to check only one response for this question, several decided to select two or more responses, resulting in an additional fifteen responses. The favorite response of the managers was "Information and demo reels from syndication services," which captured more than half of the total response (see table 8). This response was favored by managers in all three categories,

<table>
<thead>
<tr>
<th>TABLE 8.-- Which of the choices listed below most influences your station in the purchase of syndicated programing?</th>
</tr>
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<tbody>
<tr>
<td></td>
</tr>
<tr>
<td>---------------------</td>
</tr>
<tr>
<td>Total:</td>
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<td>PBS:</td>
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</table>
TABLE 8.— CONTINUED

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<tr>
<th>Recommendation/</th>
<th>No response</th>
<th>Uncertain</th>
</tr>
</thead>
<tbody>
<tr>
<td>sales rep.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total:</td>
<td>44 (23%)</td>
<td>8 (4%)</td>
</tr>
<tr>
<td>Affiliates:</td>
<td>41 (33%)</td>
<td>2 (2%)</td>
</tr>
<tr>
<td>Independents:</td>
<td>3 (7%)</td>
<td>1 (2%)</td>
</tr>
<tr>
<td>PBS:</td>
<td>0 (0%)</td>
<td>5 (19%)</td>
</tr>
</tbody>
</table>

especially among the managers of independent stations.

The aim of this question was to discover how much the content of *Broadcasting* influences the selection of syndicated programming. Evidently, the magazine has very little influence in this regard, as only 7 percent of the total sample selected trade magazines as the most influential source for selecting programming. It must be assumed from these results that *Broadcasting* has little agenda-setting ability in this particular area.

Question #7 is somewhat related to Question #6 in that it asks, once the station's programming has been selected, what types of television programming generate the most comment from the viewing audience. As in the previous question, this question generated multiple responses by several managers, resulting in 199 total responses. The goal of this question, which was derived from the "programming" category, was to find out whether the managers' responses regarding the comments of their viewers mirror *Broadcasting*'s articles on the criticisms of various types of television programs.
Most of the magazine's articles concerning the reactions brought about by certain programs were centered on documentaries, particularly those airing on PBS. In this regard the magazine's agenda corresponds to that of the PBS managers as 57 percent selected documentaries as the type of programing that elicits the most response from viewers (see table 9). Overall, however, Broadcasting's agenda differs widely from that of the total manager sample. Nearly half of all the managers selected news as generating the most

<table>
<thead>
<tr>
<th>Table 9.--- Which type of programing would you say generates the most comment from your viewers?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td>Total:</td>
</tr>
<tr>
<td>Affiliates:</td>
</tr>
<tr>
<td>Independents:</td>
</tr>
<tr>
<td>PBS:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Dramas</th>
<th>Sitcoms</th>
<th>No viewer response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total:</td>
<td>7 (4%)</td>
<td>8 (4%)</td>
<td>13 (7%)</td>
</tr>
<tr>
<td>Affiliates:</td>
<td>4 (3%)</td>
<td>5 (4%)</td>
<td>8 (6%)</td>
</tr>
<tr>
<td>Independents:</td>
<td>2 (4%)</td>
<td>3 (6%)</td>
<td>5 (11%)</td>
</tr>
<tr>
<td>PBS:</td>
<td>1 (4%)</td>
<td>0 (0%)</td>
<td>0 (0%)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>No response</th>
<th>Uncertain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total:</td>
<td>4 (2%)</td>
</tr>
<tr>
<td>Affiliates:</td>
<td>0 (0%)</td>
</tr>
<tr>
<td>Independents</td>
<td>2 (4%)</td>
</tr>
<tr>
<td>PBS:</td>
<td>2 (7%)</td>
</tr>
</tbody>
</table>

response from their viewers, with documentaries ranking as the second-most popular choice at 18 percent. During the time frame of this study, the magazine published no articles
on viewer reactions to newscasts.

Broadcasting's agenda includes a great many articles and special sections devoted to the myriad of organizations involving the television industry. Question #8 asks the managers to list those organizations to which they belong. In this case, the agenda of the magazine is very much in agreement with that of the managers, as 94 percent of the respondents indicated that they belonged to some type of broadcasting organization (see table 10). NAB and NATPE

<table>
<thead>
<tr>
<th></th>
<th>NATPE</th>
<th>NAB</th>
<th>BFMA</th>
<th>INTV</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total:</td>
<td>131</td>
<td>147</td>
<td>46</td>
<td>35</td>
</tr>
<tr>
<td>Affiliates:</td>
<td>89</td>
<td>101</td>
<td>32</td>
<td>4</td>
</tr>
<tr>
<td>Independents:</td>
<td>31</td>
<td>34</td>
<td>13</td>
<td>31</td>
</tr>
<tr>
<td>PBS:</td>
<td>11</td>
<td>12</td>
<td>1</td>
<td>0</td>
</tr>
</tbody>
</table>

TABLE 10.-- Which professional associations do you belong to?

<table>
<thead>
<tr>
<th></th>
<th>None</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total:</td>
<td>11</td>
<td>64</td>
</tr>
<tr>
<td>Affiliates:</td>
<td>5</td>
<td>38</td>
</tr>
<tr>
<td>Independents:</td>
<td>2</td>
<td>16</td>
</tr>
<tr>
<td>PBS:</td>
<td>4</td>
<td>10</td>
</tr>
</tbody>
</table>

received the greatest response, with 83 percent of the managers claiming NAB membership and 74 percent NATPE membership. These two organizations received strong support from both commercial groups, unlike the PBS group, where less than half of the managers indicated membership in either NAB or NATPE.

Among the independent managers INTV received strong
support, with more than 75 percent of the independent managers as members. There was also a significant percentage of membership by all managers in other groups, such as network affiliate groups and state broadcasting associations. The overall responses indicate that there is a great interest in television associations, an interest shown in Broadcasting by its coverage of these groups.

In its coverage of organizations devoted to television, Broadcasting pays close attention to the conventions held by such groups as NAB, NATPE and INTV. Question #9 asks the managers to list the conventions they attend in order to see if such coverage is warranted.

As in the previous question, there is a high degree of correlation between Broadcasting's emphasis on convention coverage and the emphasis given by the managers to attending those conventions. Overall, 94 percent of the managers attended one or more of the conventions listed in the survey, with 27 percent of those managers attending conventions not listed (see table 11).

Both the affiliate and independent managers were

<table>
<thead>
<tr>
<th>TABLE 11.-- Which, if any, trade conventions do you attend?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td>----------------</td>
</tr>
<tr>
<td><strong>Total:</strong></td>
</tr>
<tr>
<td><strong>Affiliates:</strong></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td><strong>Independents:</strong></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td><strong>PBS:</strong></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>
TABLE 11.-- CONTINUED

<table>
<thead>
<tr>
<th></th>
<th>None</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total:</td>
<td>11</td>
<td>48</td>
</tr>
<tr>
<td>Affiliates:</td>
<td>6</td>
<td>29</td>
</tr>
<tr>
<td>Independents:</td>
<td>2</td>
<td>10</td>
</tr>
<tr>
<td>PBS:</td>
<td>3</td>
<td>9</td>
</tr>
</tbody>
</table>

frequent convention-goers, particularly to the NAB and NATPE affairs. In addition, two-thirds of the independent managers attended the INTV convention. As before, the PBS managers shared less of an inclination to belong to and attend the functions of industry groups. The PBS managers did, however, rank highest in percentage in the "other" category, which in their case consisted mostly of PBS-related conventions.

Since the managers indicated in Question #8 that they are quite active in association membership, it is quite logical that they would also be active in attending the functions of the associations. In both cases Broadcasting's emphasis on covering the associations and their related activities shows that the magazine's agenda is close to that of the managers.

Question #10 asks the managers if they think the Fairness Doctrine should be eliminated. This question arises from the "regulation" category and represents one of the most pressing issues faced by the FCC during the content analysis of Broadcasting. The magazine has encouraged,
through its editorials and regular articles, the efforts of
the FCC, RTNDA and Meredith Publishing to strike down the
doctrine. Since the issue is somewhat volatile, it is
interesting to note if the managers support Broadcasting's
stand.

In the total manager sample the respondents are strongly
in agreement with the magazine, with 66 percent favoring
abolishment of the doctrine (see table 12). Support was
strongest among the network affiliate managers, with 77
percent in favor. The weakest support came from the PBS
managers, where only 20 percent backed the magazine's
position. In fact, 53 percent of the total "no" responses
came from the PBS managers, a group that accounts for only
14 percent of the total sample.

TABLE 12.-- Do you think that the Fairness Doctrine
should be eliminated?

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
<th>No response</th>
<th>Uncertain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total:</td>
<td>117</td>
<td>53</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>Affiliates:</td>
<td>86</td>
<td>19</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>Independents:</td>
<td>26</td>
<td>14</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>PBS:</td>
<td>5</td>
<td>20</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

It is not surprising that the managers of the commercial
stations want to be rid of the Fairness Doctrine. Their
oft-stated position is that the doctrine stifles editorial
commentary by giving persons with opposing viewpoints the
legal right to demand air time to state their views. It is
also not surprising that the PBS managers oppose the
elimination of the doctrine. The PBS stations have less rigid schedules than their commercial counterparts, making it easier to accommodate those who request air time. Perhaps more importantly, PBS has a philosophy and a history of airing material of a controversial nature.

To summarize, it does appear that Broadcasting's agenda is strongly in agreement with the commercial managers. On the other hand, the magazine's agenda is just as strongly opposed by the managers of noncommercial stations.

The previous question on the Fairness Doctrine was just one example of the FCC's efforts to deregulate the television industry. Since the managers supported that example, it is important to learn whether they support the entire deregulation program. Question #11 asks the managers whether they approve or disapprove of the FCC's deregulation efforts.

As can be seen in table 13, the managers' support does extend to the full range of deregulation efforts, as nearly 75 percent of the managers answered "yes" to this question. As in the previous question, support was strongest among the affiliate managers and less strong among the independent managers. The PBS managers have reiterated their opinion that the deregulation effort is wrong, with 56 percent indicating disapproval.
TABLE 13.-- In general, do you approve or disapprove of the FCC's deregulation efforts?

<table>
<thead>
<tr>
<th></th>
<th>Approve</th>
<th>Disapprove</th>
<th>No response</th>
<th>Uncertain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total:</td>
<td>131 (74%)</td>
<td>42 (24%)</td>
<td>1 (1%)</td>
<td>3 (2%)</td>
</tr>
<tr>
<td>Affiliates:</td>
<td>94 (85%)</td>
<td>17 (15%)</td>
<td>0 (0%)</td>
<td>0 (0%)</td>
</tr>
<tr>
<td>Independents:</td>
<td>26 (63%)</td>
<td>11 (27%)</td>
<td>1 (2%)</td>
<td>3 (7%)</td>
</tr>
<tr>
<td>PBS:</td>
<td>11 (44%)</td>
<td>14 (56%)</td>
<td>0 (0%)</td>
<td>0 (0%)</td>
</tr>
</tbody>
</table>

Broadcasting's agenda includes support for the deregulation effort and so, as in the previous question, the agendas of the magazine and the commercial managers are in agreement. The PBS managers have again shown that they have a different agenda by disagreeing with the magazine's stated policies.

The must-carry controversy received a great deal of coverage in Broadcasting as one of the top stories during the period of this study. Charges and countercharges were flung at each other by cable and broadcast interests as fear over the potential effects of the demise of the must-carry regulations heightened. Despite all the furor, the magazine carried little information on documented cases resulting from the must-carry decision. Question #12 seeks to discover the actual effects of the loss of must-carry protection by asking the managers if they have been affected in any way.

More than half of the respondents stated that they had been in some way affected by a lack of must-carry protection.
(see table 14). The PBS stations ranked highest in this regard, with 80 percent of the PBS managers answering "yes" to this question. Independent managers were next at 61 percent, followed by the affiliate managers at 41 percent.

TABLE 14.-- Has your station been affected in any way by the U.S. Court of Appeals ruling declaring the must-carry rules unconstitutional?

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
<th>No response</th>
<th>Uncertain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total:</td>
<td>91 (51%)</td>
<td>84 (47%)</td>
<td>2 (1%)</td>
<td>0 (0%)</td>
</tr>
<tr>
<td>Affiliates:</td>
<td>46 (41%)</td>
<td>64 (58%)</td>
<td>1 (1%)</td>
<td>0 (0%)</td>
</tr>
<tr>
<td>Independents:</td>
<td>25 (61%)</td>
<td>15 (37%)</td>
<td>1 (2%)</td>
<td>0 (0%)</td>
</tr>
<tr>
<td>PBS:</td>
<td>20 (80%)</td>
<td>5 (20%)</td>
<td>0 (0%)</td>
<td>0 (0%)</td>
</tr>
</tbody>
</table>

For this question a space was provided for the managers to make additional comments about their experiences with must-carry. Some of these comments, as shown below, may give an insight into the real effects of must-carry:

- "CATV operators have the freedom to delete or move stations to different channels at their discretion. TV stations furnish them with free programing and should have some say as to where they run."
- "Some cable systems have dropped our station."
- "Public TV was cut off at the pass..."
- "...the loss of must-carry will have a definite impact."
- "A small market station cannot survive without must carry..."
"Immoral endorsement of [monstrous] cable monopoly!"

Even those who answered "no" to this question had some fear of the consequences of must-carry. Many of them wrote "not yet," as though they anticipated some dire consequences to come.

By its printing of numerous articles on the potential disaster arising from the must-carry decision, it must be taken that Broadcasting has aligned itself with the broadcast forces in this dispute. This is not surprising since the magazine concerns itself mainly with broadcast matters. It can be assumed here that the magazine's agenda is pro must-carry, an agenda that is shared by both the commercial and noncommercial managers.

As seen in the managers' comments in the preceding question, the must-carry ruling aroused considerable controversy. When the cable and broadcast sides realized that they could not settle their dispute they asked the FCC to step in and create a compromise settlement. When the FCC complied, a whole new storm of outrage was created, as recounted in Broadcasting's numerous articles on the subject. Question #13 seeks to discover how much of a controversy really exists on this issue by asking the managers whether or not they support the must-carry compromise developed by the FCC.
As seen in table 15, opinion is fairly well split on the merits of the FCC compromise, with 46 percent approving and 44 percent disapproving. The only group to register approval was the affiliates, who had the least to lose in the FCC decision. The majority of the independent managers did not support the FCC since one of the provisos of the agreement specified that independent stations had to reach minimum viewership levels in order to guarantee carriage on cable systems. The PBS managers were strongly opposed to the compromise, mostly because the FCC decided that cable systems should be required to carry only one noncommercial station. The PBS managers feared that that would leave many PBS stations with vastly reduced audiences.

**TABLE 15.**-- Do you support the must-carry compromise developed by the FCC?

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
<th>No response</th>
<th>Uncertain</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total:</strong></td>
<td>81 (46%)</td>
<td>78 (44%)</td>
<td>8 (5%)</td>
<td>10 (6%)</td>
</tr>
<tr>
<td><strong>Affiliates:</strong></td>
<td>60 (54%)</td>
<td>37 (33%)</td>
<td>7 (6%)</td>
<td>7 (6%)</td>
</tr>
<tr>
<td><strong>Independents:</strong></td>
<td>17 (41%)</td>
<td>20 (49%)</td>
<td>1 (2%)</td>
<td>3 (7%)</td>
</tr>
<tr>
<td><strong>PBS:</strong></td>
<td>4 (16%)</td>
<td>21 (84%)</td>
<td>0 (0%)</td>
<td>0 (0%)</td>
</tr>
</tbody>
</table>

Broadcasting's tone on this issue, expressed mostly through its editorial page, was that the FCC compromise agreement should be accepted by both the cable and broadcast interests. The responses to this question show that the affiliate managers were the only group in agreement with the magazine's position. The remaining two manager groups opposed Broadcasting's views, with the independent
managers only slightly in disagreement and the PBS managers strongly opposed. Again, the PBS managers stand far apart from the commercial managers in their views.

The main item on Broadcasting's journalism agenda was the development and growth of satellite news gathering, better known as SNG. Since the use of SNG by local stations is a new development, it is interesting to note whether the local managers have followed Broadcasting's lead in this area. To discover the extent of use of SNG, Question #14 asks the managers if their stations are equipped for satellite news gathering.

Looking at the overall response it appears as though the local managers are in agreement with the magazine (see table 16). Half of the managers report that they are equipped for SNG, especially at the network affiliates, where 56 percent of the stations are SNG-equipped. This is at least partially due to cost sharing programs initiated by the networks, a development well documented by several articles in the magazine. It is a bit surprising that more than half

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
<th>No response</th>
<th>Uncertain</th>
</tr>
</thead>
<tbody>
<tr>
<td>88 (50%)</td>
<td>89 (50%)</td>
<td>0 (0%)</td>
<td>0 (0%)</td>
</tr>
<tr>
<td>62 (56%)</td>
<td>49 (44%)</td>
<td>0 (0%)</td>
<td>0 (0%)</td>
</tr>
<tr>
<td>21 (51%)</td>
<td>20 (49%)</td>
<td>0 (0%)</td>
<td>0 (0%)</td>
</tr>
<tr>
<td>5 (20%)</td>
<td>20 (80%)</td>
<td>0 (0%)</td>
<td>0 (0%)</td>
</tr>
</tbody>
</table>
of the independents have SNG capabilities, since fully-staffed news departments are not a common feature at independent stations. It is not surprising that the great majority of PBS stations lack SNG, since very few noncommercial stations support news staffs.

It appears as though the managers are in agreement with Broadcasting on this new development in journalism technology. Since SNG is still a new development, the fact that half the stations in the sample already have the technology indicates that SNG will become more or less commonplace in the near future, at least at commercial stations. The early emphasis given to SNG by the magazine shows that it may well have played an important role in gaining SNG's quick acceptance by the industry.

The response to Question #14 gave some indication of the quick growth of SNG technology. Question #15 asks those managers who answered "no" to Question #14 if their future plans call the implementation of SNG equipment, which should provide an indication of SNG's continued growth. From the managers' responses it appears as though SNG will continue to grow, but at a slower rate (see table 17). Only a fourth of the managers who answered "no" to the previous question have plans to install SNG in the future. The reasons for this are varied. SNG is very expensive, with installation costs exceeding $750,000. It is also expensive to maintain,
and usually requires the hiring of additional staff. It is also more suited to some markets than others. In a small market with little local news activity, the SNG expenditures would be hard to justify. Then there are those who just don't believe that SNG would help their station's news operation.

**TABLE 17.-- If you answered "No," do your future plans call for the implementation of SNG equipment?**

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
<th>No response</th>
<th>Uncertain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total:</td>
<td>20 (11%)</td>
<td>65 (37%)</td>
<td>90 (51%)</td>
<td>2 (1%)</td>
</tr>
<tr>
<td>Affiliates:</td>
<td>14 (13%)</td>
<td>31 (28%)</td>
<td>64 (58%)</td>
<td>2 (2%)</td>
</tr>
<tr>
<td>Independents:</td>
<td>3 (7%)</td>
<td>17 (41%)</td>
<td>21 (51%)</td>
<td>0 (0%)</td>
</tr>
<tr>
<td>PBS:</td>
<td>3 (12%)</td>
<td>17 (68%)</td>
<td>5 (20%)</td>
<td>0 (0%)</td>
</tr>
</tbody>
</table>

It was stated previously that Broadcasting could have been responsible for SNG's quick acceptance. Even though the majority of the managers responding to this question indicate that they will not use SNG, this does not negate the magazine's influence. More than one-third of the managers in the sample have adopted SNG, a figure even more impressive when it is realized that most of the managers in this survey work in medium and small-sized markets that have less money for, and less opportunity to use, SNG equipment.

Broadcasting devotes a fair amount of space to Congressional activities, as seen by the number of articles in the "legislation" category. These articles, however, dealt with matters pertaining to the FCC, the networks and
other national groups. There were no articles in this category that would have had a direct effect on local stations. Nevertheless, in order to gauge the managers' opinions in this area, Question #16 asked them to rate the effect on their stations of laws pertaining to broadcasting passed by Congress.

Interestingly, more than two-thirds of the managers reported that laws passed by Congress had had a "great" or "moderate" effect on their stations (see table 18). Since

<table>
<thead>
<tr>
<th></th>
<th>Great</th>
<th>Moderate</th>
<th>Little</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total:</strong></td>
<td>24 (14%)</td>
<td>89 (50%)</td>
<td>57 (32%)</td>
</tr>
<tr>
<td><strong>Affiliates:</strong></td>
<td>13 (12%)</td>
<td>57 (51%)</td>
<td>37 (33%)</td>
</tr>
<tr>
<td><strong>Independents:</strong></td>
<td>6 (15%)</td>
<td>22 (57%)</td>
<td>11 (27%)</td>
</tr>
<tr>
<td><strong>PBS:</strong></td>
<td>5 (20%)</td>
<td>10 (40%)</td>
<td>9 (36%)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>No response</th>
<th>Uncertain</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total:</strong></td>
<td>5 (3%)</td>
<td>2 (1%)</td>
</tr>
<tr>
<td><strong>Affiliates:</strong></td>
<td>3 (3%)</td>
<td>1 (1%)</td>
</tr>
<tr>
<td><strong>Independents:</strong></td>
<td>2 (5%)</td>
<td>0 (0%)</td>
</tr>
<tr>
<td><strong>PBS:</strong></td>
<td>0 (0%)</td>
<td>1 (0%)</td>
</tr>
</tbody>
</table>

Broadcasting's agenda concerned only matters on the national level, it appears as though these managers have accepted the magazine's agenda as their own, assuming that the managers receive most information of this type from the magazine.

Of the three managerial groups, only the PBS managers
had any legitimate reason to be concerned with Congressional activities, since Congress must pass a budget for PBS activities each year. Still, only 20 percent of the PBS managers reported a "great" effect on their stations arising from laws passed in Congress. One discerning manager made a notation on his survey next to this question, asking, "What laws?" Either the other managers were not paying close attention to events in this area or they are followers of the trickle-down theory, believing that events on the national level will later affect them locally.

Question #17 is derived from the "law" category, which, like "legislation," contained very few articles that would directly affect the local manager. One item here that might concern the managers is libel suits, and so this question asks the managers if their stations have been involved in a libel suit in the past year. The libel suits faced by the networks receive regular coverage in Broadcasting. The aim of this question is to determine if the same situation exists at the local level.

As table 19 shows, only 10 percent of the respondents have been involved with a libel suit during the time of this study, and all but one of those suits were aimed at network affiliates. Although any libel suit is serious, the fact that only 10 percent of the stations were involved indicates that the problem is not rampant throughout the industry.
Broadcasting dedicates little space to the topic of local libel suits and appears to be justified in doing so, since the relative lack of libel suits would put this subject rather low on the managers' agenda.

**TABLE 19.**-- Has your station been involved in a libel suit in the past year?

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>17 (10%)</td>
<td>160 (90%)</td>
</tr>
<tr>
<td>Affiliates</td>
<td>16 (14%)</td>
<td>95 (86%)</td>
</tr>
<tr>
<td>Independents</td>
<td>1 (2%)</td>
<td>40 (98%)</td>
</tr>
<tr>
<td>PBS</td>
<td>0 (0%)</td>
<td>25 (100%)</td>
</tr>
</tbody>
</table>

Question #18 is a follow-up to the previous question, and asked the managers who responded "yes" to Question #17 whether they won or lost the libel suits filed against their stations. According to a number of articles in Broadcasting, both the networks and local stations have enjoyed success in defending themselves against libel suits. According to the managers' responses, this appears to be true. Out of seventeen suits named by the managers, the stations have won ten and lost only one (see table 20). Four of the managers indicated that their suits were still

**TABLE 20.**-- If you answered "Yes" to the previous question, did you win or lose the suit?

<table>
<thead>
<tr>
<th></th>
<th>Won</th>
<th>Lost</th>
<th>No response</th>
<th>Uncertain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>10</td>
<td>1</td>
<td>161</td>
<td>5</td>
</tr>
<tr>
<td>Affiliates</td>
<td>10</td>
<td>1</td>
<td>95</td>
<td>5</td>
</tr>
<tr>
<td>Independents</td>
<td>0</td>
<td>0</td>
<td>41</td>
<td>0</td>
</tr>
<tr>
<td>PBS</td>
<td>0</td>
<td>0</td>
<td>25</td>
<td>0</td>
</tr>
</tbody>
</table>
pending in the courts and one manager declined to respond to this question.

Question #19 asks the managers whether their stations utilize barter-syndication programs. The increase in the use of barter-syndication programs by local stations was one of the primary themes in the "advertising" category. According to Broadcasting’s agenda, the use of barter-syndication is widespread, an idea which is confirmed by the managers in this survey (see table 21). All but two of the managers among the commercial stations stated that their stations used barter-syndication.

**TABLE 21.-- Does your station use barter-syndication programs?**

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
<th>No response</th>
<th>Uncertain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total:</td>
<td>151</td>
<td>23</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td>Affiliates:</td>
<td>110</td>
<td>1</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Independents:</td>
<td>40</td>
<td>0</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>PBS:</td>
<td>1</td>
<td>22</td>
<td>2</td>
<td>0</td>
</tr>
</tbody>
</table>

The response from the PBS managers is not surprising, since barter-syndication programs are not really designed for use at noncommercial stations. A case could be made, however, for including programs which utilize "enhanced underwriting" as barter-syndication. This term is another way of saying that some corporate sponsors can include short commercials in the programing that they sponsor, as long as it meets certain stipulations, such as not mentioning
pricing or any specific products. This practice is currently in use at a few PBS stations, mostly those in larger markets.

It would appear that among the commercial stations the agendas of the magazine and the managers are in agreement. The PBS managers have again indicated that they have a different agenda to follow.

Question #20 stems from another major theme in the "advertising" category, asking the managers if their stations allow advertisers to run fifteen-second spots. According to the articles published in Broadcasting, the use of fifteen-second spots is a topic of heated debate between advertisers and stations. The magazine did not take a hard stand on this issue, but tended to side with the stations in believing fifteen-second spots to be a nuisance and an additional source of clutter in programing. There is also the question of reduced revenue, since the shorter spots can be aired for considerably less money than a thirty-second commercial.

According to the responses of the managers, the debate as reported in the magazine might not have been so heated after all. As table 22 shows, 93 percent of the commercial stations have allowed the use of the shorter commercials. This response leads one to believe that Broadcasting based its agenda on a small number of stations who were outspoken
in their opposition to these spots. It appears that the stations' agenda has been nearly the opposite, as the fifteen-second commercials have been accepted without much resistance. The PBS stations are either resisting the use of the spots or refuse to label their enhanced underwriting as commercials.

**TABLE 22.-- Does your station allow advertisers to run fifteen-second spots?**

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
<th>No response</th>
<th>Uncertain</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total:</strong></td>
<td>143 (81%)</td>
<td>27 (15%)</td>
<td>6 (3%)</td>
<td>1 (1%)</td>
</tr>
<tr>
<td><strong>Affiliates:</strong></td>
<td>100 (90%)</td>
<td>9 (8%)</td>
<td>1 (1%)</td>
<td>1 (1%)</td>
</tr>
<tr>
<td><strong>Independents:</strong></td>
<td>41 (100%)</td>
<td>0 (0%)</td>
<td>0 (0%)</td>
<td>0 (0%)</td>
</tr>
<tr>
<td><strong>PBS:</strong></td>
<td>2 (8%)</td>
<td>18 (72%)</td>
<td>5 (20%)</td>
<td>0 (0%)</td>
</tr>
</tbody>
</table>

Question #21 concerns the "Monday Memo" column, which, along with its editorial page, is an effective way for Broadcasting to communicate its agenda to the managers. Unlike the editorial page, which is written by the magazine's editors, "Monday Memo" is written by guest columnists. This means that while Broadcasting has no direct influence over the content of the column it does have influence over who is chosen to write for the column.

This question asked the managers if they read the "Monday Memo" column. Two-thirds of the managers responded in the affirmative, with the percentages fairly equal among all three manager groups (see table 23). This strong response indicates that the column could well be an agenda-setting device, but only if the local managers
strongly believe in what they read.

TABLE 23.-- Do you read the "Monday Memo" column in Broadcasting magazine?

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
<th>No response</th>
<th>Uncertain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total:</td>
<td>119 (67%)</td>
<td>46 (26%)</td>
<td>5 (3%)</td>
<td>7 (4%)</td>
</tr>
<tr>
<td>Affiliates:</td>
<td>77 (69%)</td>
<td>26 (23%)</td>
<td>3 (3%)</td>
<td>5 (5%)</td>
</tr>
<tr>
<td>Independents:</td>
<td>26 (63%)</td>
<td>13 (32%)</td>
<td>1 (2%)</td>
<td>1 (4%)</td>
</tr>
<tr>
<td>PBS:</td>
<td>16 (64%)</td>
<td>7 (28%)</td>
<td>1 (4%)</td>
<td>1 (4%)</td>
</tr>
</tbody>
</table>

Now that it has been established how many managers read "Monday Memo" it must be discovered what the managers do with the information learned from the column. Is the material of any practical use to the managers or merely something that is read and then instantly forgotten?

Question #22 asked those managers who answered "yes" to Question #21 if they found the views of the guest columnists helpful in managing their stations. Of the managers who responded to this question, 68 percent replied that the views of the guest columnists do help them in managing their station (see table 24). The affiliate managers registered the highest response at 71 percent, followed by the PBS managers at 64 percent and the independent managers at 59 percent. This response indicates that this column is read for more than just entertainment's sake and can be a potent influence on the local managers. Based on this response it can be reasonably assumed that "Monday Memo" is an agenda-setting device, although it must be remembered that the content emanates from fellow managers and not from
Broadcasting's editorial staff.

TABLE 24.-- If you answered "Yes" to the previous question, do you find the views of the "Monday Memo" guest columnists helpful in managing your station?

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
<th>No response</th>
<th>Uncertain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>73 (41%)</td>
<td>35 (20%)</td>
<td>62 (35%)</td>
<td>7 (4%)</td>
</tr>
<tr>
<td>Affiliates</td>
<td>51 (46%)</td>
<td>21 (19%)</td>
<td>34 (31%)</td>
<td>5 (5%)</td>
</tr>
<tr>
<td>Independents</td>
<td>13 (32%)</td>
<td>9 (22%)</td>
<td>17 (41%)</td>
<td>2 (5%)</td>
</tr>
<tr>
<td>PBS</td>
<td>9 (36%)</td>
<td>5 (20%)</td>
<td>11 (44%)</td>
<td>0 (0%)</td>
</tr>
</tbody>
</table>

Broadcasting's editorial page has a long history of being one of the most outspoken and influential voices in the broadcast media. It is not surprising, then, that when Question #23 asked the managers if they read Broadcasting's editorial page, the "yes" responses were very high (see table 25). Seventy-three percent of the managers read the editorial page, with no one manager group deviating a great amount from that figure. Even the PBS managers, who often disagree with the magazine's agenda, are heavy readers of the editorial page. Many of the "undecided" respondents indicated that they also read the
editorial page, but not on a regular basis.

Question #24 asked the managers if they generally agreed or disagreed with Broadcasting's editorial comments. Of the 130 managers who said that they are regular readers of the magazine's editorial page, 102 had a definite opinion on whether they generally agree or disagree with the editorial page (see table 26). Of these, ninety-five managers, an overwhelming 93 percent, said that they are in agreement with the magazine's editorial views. Even though the phrase, "in general," prefaced this question, twenty-eight managers wrote in comments to the effect that they could not commit themselves to an overall agreement or disagreement with the editorials.

**TABLE 26.** In general, do you agree or disagree with the editorial comments of the magazine?

<table>
<thead>
<tr>
<th></th>
<th>Agree</th>
<th>Disagree</th>
<th>No response</th>
<th>Uncertain</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total:</strong></td>
<td>95 (54%)</td>
<td>7 (4%)</td>
<td>50 (28%)</td>
<td>25 (14%)</td>
</tr>
<tr>
<td><strong>Affiliates:</strong></td>
<td>64 (58%)</td>
<td>2 (2%)</td>
<td>33 (30%)</td>
<td>12 (11%)</td>
</tr>
<tr>
<td><strong>Independents:</strong></td>
<td>24 (59%)</td>
<td>0 (0%)</td>
<td>10 (24%)</td>
<td>7 (17%)</td>
</tr>
<tr>
<td><strong>PBS:</strong></td>
<td>7 (28%)</td>
<td>5 (20%)</td>
<td>7 (28%)</td>
<td>6 (24%)</td>
</tr>
</tbody>
</table>

Among the 130 managers who responded to this question, the affiliate managers were the strongest supporters of the editorials, with 87 percent indicating agreement. Seventy-one percent of the independent managers also agreed with the editorials. Not surprisingly, only 36 percent of the PBS managers aligned themselves with the magazine's
editorial position. The PBS managers have consistently demonstrated throughout the course of this survey that their agenda differs significantly from that of the commercial managers.

This question is one of the most significant in the survey, since it asks the managers to approve or disapprove of the magazine's editorial agenda. The fact that so many managers, at least among the commercial stations, agree with the magazine means that Broadcasting is a definite influence on the agenda of these managers. Unfortunately, the power of this influence cannot be determined from this question.

The installation of satellite receivers was the main topic in the "satellite" category. Question #25 seeks to verify the interest paid by Broadcasting to this issue by asking the managers if their stations use satellite dishes to downlink programing.

It was assumed here that satellite dishes might be a luxury enjoyed by the larger and more prosperous stations. As can be seen by table 27 this is not the case. All but one station in the survey is equipped with the receivers. For some reason, one of the managers decided not to respond to this question. It appears as though Broadcasting's emphasis on the use of satellite equipment is well justified by these responses.
TABLE 27.— Does your station use satellite dishes to downlink programming?

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
<th>No response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>176 (99%)</td>
<td>0 (0%)</td>
<td>1 (1%)</td>
</tr>
<tr>
<td>Affiliates</td>
<td>111 (100%)</td>
<td>0 (0%)</td>
<td>0 (0%)</td>
</tr>
<tr>
<td>Independents</td>
<td>40 (98%)</td>
<td>0 (0%)</td>
<td>1 (2%)</td>
</tr>
<tr>
<td>PBS</td>
<td>25 (100%)</td>
<td>0 (0%)</td>
<td>0 (0%)</td>
</tr>
</tbody>
</table>

The rationale behind Question #26, which asks if the managers' stations are equipped to broadcast in stereo, is exactly the same as in the previous question. Broadcasting has devoted a lot of space to a new technology, stereo television, and what is to be learned is whether this technology is being utilized by the local stations.

Stereo television has not enjoyed the same acceptance as satellite receivers among television stations, with only 39 percent of the total sample equipped for stereo transmission (see table 28). Even so, 39 percent is still

TABLE 28.— Is your station equipped to broadcast in stereo?

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>67 (39%)</td>
<td>110 (62%)</td>
</tr>
<tr>
<td>Affiliates</td>
<td>47 (42%)</td>
<td>64 (58%)</td>
</tr>
<tr>
<td>Independents</td>
<td>13 (32%)</td>
<td>28 (68%)</td>
</tr>
<tr>
<td>PBS</td>
<td>7 (28%)</td>
<td>18 (72%)</td>
</tr>
</tbody>
</table>

a significant number, considering the expense and the work involved in upgrading a transmitter to stereo. It must also be remembered that only one network, NBC, has made a
concerted effort to air stereo programming. Until the other networks and the major syndicators produce more stereo programs there is not much incentive for the stations to make the change.

Despite the relatively low number of stations that are stereo-equipped it can be seen that Broadcasting's agenda is not being rejected by the managers. The emphasis given to stereo by the magazine is justified by the number of stations who are already stereo-ready and the number of stations who will join the ranks as more stereo programming becomes available.

The assumption made in the previous question, that more stations would soon join the ranks of the stereo-equipped, is vindicated by the responses to Question #27, which asked those managers who answered "no" to Question #26 if their future plans call for the installation of stereo equipment. Sixty-one percent of the managers said that they did plan to equip their stations for stereo broadcasts (see table 29). This figure was highest among PBS managers, where

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
<th>No response</th>
<th>Uncertain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total:</td>
<td>67 (38%)</td>
<td>37 (21%)</td>
<td>70 (40%)</td>
<td>3 (2%)</td>
</tr>
<tr>
<td>Affiliates:</td>
<td>40 (36%)</td>
<td>21 (19%)</td>
<td>49 (44%)</td>
<td>1 (1%)</td>
</tr>
<tr>
<td>Independents:</td>
<td>14 (34%)</td>
<td>13 (32%)</td>
<td>13 (32%)</td>
<td>1 (2%)</td>
</tr>
<tr>
<td>PBS:</td>
<td>13 (52%)</td>
<td>3 (12%)</td>
<td>8 (32%)</td>
<td>1 (4%)</td>
</tr>
</tbody>
</table>

TABLE 29.-- If not, do your future plans call for the installation of stereo equipment?
72 percent indicated their intention to convert to stereo. This is not surprising due to the number of musical programs carried by PBS. As to the commercial stations, 63 percent of the affiliate managers and 50 percent of the independent managers plan on installing stereo.

Taking Questions #26 and #27 together it appears as though stereo television will eventually be used at a large majority of the stations in this survey. This is still further evidence that Broadcasting's stereo coverage is warranted and that the agendas of the managers and the magazine are in agreement.

Earlier questions asked the managers if they had been affected by the must-carry ruling and whether the managers supported the must-carry compromise proposed by the FCC. Question #28, which stems from the "cable" category, is much more specific. In light of all the predictions of disaster made by broadcast interests this question seeks hard data: Has your station been refused carriage on a cable system because of the recent must-carry rulings?

From the responses to this question it is evident that must-carry has had an effect on some television stations. Nearly one-fourth of the managers said that their stations have been dropped from cable systems (see table 30). Hardest hit were the independents, where 37 percent reported that they have been dropped, and the PBS stations, where 36
percent have been dropped. The affiliates reported a much lower figure of 17 percent.

TABLE 30.-- Has your station been refused carriage on a cable system because of the recent must-carry ruling?

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
<th>No response</th>
<th>Uncertain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total:</td>
<td>43 (24%)</td>
<td>125 (71%)</td>
<td>6 (3%)</td>
<td>3 (2%)</td>
</tr>
<tr>
<td>Affiliates:</td>
<td>19 (17%)</td>
<td>90 (81%)</td>
<td>0 (0%)</td>
<td>2 (2%)</td>
</tr>
<tr>
<td>Independents:</td>
<td>15 (37%)</td>
<td>22 (49%)</td>
<td>3 (7%)</td>
<td>1 (2%)</td>
</tr>
<tr>
<td>PBS:</td>
<td>9 (36%)</td>
<td>13 (52%)</td>
<td>3 (12%)</td>
<td>0 (0%)</td>
</tr>
</tbody>
</table>

Taken as a whole, Broadcasting's agenda, which included a number of articles on the potential doom arising from the must-carry decision, is at least a bit prophetic, since 24 percent of the stations in the survey have been dropped. Whether this qualifies as a disaster or not is hard to determine. It is obvious that the agendas of the managers and the magazine are very much in agreement on the must-carry issue.

It is also interesting to note that while only 24 percent of the managers reported that they have been dropped from a cable system, 51 percent claimed in Question #12 that they have been affected by the loss of must-carry. How were the additional 27 percent affected? It could be that the magazine's articles and editorials convinced the managers of losses they had not really incurred.

Question #29 is from "radio," one of least popular categories in the survey. This question asked the managers
to rate radio as a competitive force in their markets. It appears that on Broadcasting's agenda radio coverage ranks far down the list. The objective of this question is to see whether this relative lack of coverage is justified. If the managers see radio as a potent media force in their markets, then perhaps Broadcasting should pay more attention to the competition.

Nearly half of the managers took the middle road and said that radio was somewhat competitive in their markets, as indicated in table 31. Nearly a third felt that radio was very competitive, and a lesser number, 19 percent, said that radio offered no competition to their stations. The competition from radio was felt most keenly by independent stations, probably because they do not enjoy the traditional built-in audience of the network affiliates and must struggle harder for their own audience.

TABLE 31.— How would you rate radio as a competitive force in your market?

<table>
<thead>
<tr>
<th></th>
<th>Very competitive</th>
<th>Somewhat competitive</th>
<th>No competition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total:</td>
<td>54 (31%)</td>
<td>87 (49%)</td>
<td>34 (19%)</td>
</tr>
<tr>
<td>Affiliates:</td>
<td>30 (27%)</td>
<td>63 (57%)</td>
<td>17 (15%)</td>
</tr>
<tr>
<td>Independents:</td>
<td>20 (49%)</td>
<td>18 (44%)</td>
<td>3 (7%)</td>
</tr>
<tr>
<td>PBS:</td>
<td>4 (16%)</td>
<td>6 (24%)</td>
<td>14 (56%)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>No response</th>
<th>Uncertain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total:</td>
<td>1 (1%)</td>
<td>1 (1%)</td>
</tr>
<tr>
<td>Affiliates:</td>
<td>0 (0%)</td>
<td>1 (1%)</td>
</tr>
<tr>
<td>Independents:</td>
<td>0 (0%)</td>
<td>0 (0%)</td>
</tr>
<tr>
<td>PBS:</td>
<td>1 (4%)</td>
<td>0 (0%)</td>
</tr>
</tbody>
</table>
The majority of the PBS managers saw radio as no competition at all, which is not surprising since PBS stations try to attract a small but select audience. Most of the affiliate managers felt that radio was somewhat competitive. It was noted during the compilation of these figures that most of the affiliate managers in large cities indicated that radio was very competitive, while managers in smaller markets saw radio as less of a threat. This is possibly due to the longer amount of time spent traveling in cars in the larger cities, which helps radio audiences to develop regular listening habits.

It would appear from the responses to this question, where 80 percent of the managers listed radio as "very competitive" or "somewhat competitive," that Broadcasting's agenda differs from that of the managers in that the managers have a higher regard for the power of radio. The magazine's stated purpose is to cover all the electronic media, yet it pays far more attention to television than radio. In this case the agendas do not correspond.

Broadcasting pays close attention to the ratings wars carried on by the three networks. As seen earlier, these ratings are important to the local managers, but not as important as the ratings of the managers' own stations. While ratings are important on Broadcasting's agenda, it
would be nearly impossible for the magazine to publish
detailed accounts of the ratings situation in each market.
Question #30, therefore, is intended to get an indication of
the importance of local ratings by asking the managers which
ratings services are subscribed to by their stations. It
was felt that subscribing to more than one of these
services would be a good indication of the importance of
ratings information, since these services are not
inexpensive.

More than two-thirds of the managers subscribe to both
the Nielsen and Arbitron services (see table 32), showing

<table>
<thead>
<tr>
<th></th>
<th>Nielsen only</th>
<th>Arbitron only</th>
<th>Both services</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total:</strong></td>
<td>25 (15%)</td>
<td>21 (12%)</td>
<td>119 (67%)</td>
</tr>
<tr>
<td><strong>Affiliates:</strong></td>
<td>7 (6%)</td>
<td>11 (10%)</td>
<td>93 (84%)</td>
</tr>
<tr>
<td><strong>Independents:</strong></td>
<td>3 (7%)</td>
<td>6 (15%)</td>
<td>24 (59%)</td>
</tr>
<tr>
<td><strong>PBS:</strong></td>
<td>15 (60%)</td>
<td>4 (16%)</td>
<td>2 (8%)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Other</th>
<th>None</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total:</strong></td>
<td>1 (1%)</td>
<td>11 (6%)</td>
</tr>
<tr>
<td><strong>Affiliates:</strong></td>
<td>0 (0%)</td>
<td>0 (0%)</td>
</tr>
<tr>
<td><strong>Independents:</strong></td>
<td>0 (0%)</td>
<td>8 (20%)</td>
</tr>
<tr>
<td><strong>PBS:</strong></td>
<td>1 (4%)</td>
<td>3 (12%)</td>
</tr>
</tbody>
</table>

that ratings are indeed very important on the local level.
Only the PBS managers differed, as 60 percent subscribed to
only the Nielsen service. This is not surprising since the
noncommercial stations have much less need for ratings
information. Rather than use the ratings to sell time to
advertisers, the PBS stations are instead more interested in the demographics of their audience.

With a question such as this it is difficult to say whether the agendas of the managers and the magazine correlate, since *Broadcasting* does not give much space to local ratings. It can be said, however, that the agendas do match in that both are highly interested in the general subject of ratings.

Question #31 asks the managers if they support the use of people meters by the Nielsen service as a substitute for the present diary method of ratings measurement. The full account of the controversy over people meters was recounted earlier, but the gist of the argument is that preliminary evidence indicates that people meters, because they are said to be more accurate, will show that television audience figures have been inflated for many years. The articles on people meters in *Broadcasting* tend to take the side of the networks in resisting the use of the meters, for fear that lower ratings figures will allow advertisers to demand lower rates.

Overall, the managers oppose the people meters, but not as much as might have been supposed (see table 33). Among the manager groups only the affiliate managers stand against the meters. The independent managers are strongly in favor of the meters, while the PBS managers are evenly split. The
response of the independent managers is a bit puzzling, unless it is assumed that the independents believe that the people meters will show that their audiences are larger than has been previously measured with conventional ratings methods.

TABLE 33.— Do you support the use of "people meters" by the Nielsen service as a substitute for the present diary method of ratings measurement?

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
<th>No response</th>
<th>Uncertain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total:</td>
<td>70</td>
<td>91</td>
<td>11 (6%)</td>
<td>5 (3%)</td>
</tr>
<tr>
<td>Affiliates:</td>
<td>34</td>
<td>70</td>
<td>5 (5%)</td>
<td>2 (2%)</td>
</tr>
<tr>
<td>Independents:</td>
<td>25</td>
<td>10</td>
<td>5 (12%)</td>
<td>1 (2%)</td>
</tr>
<tr>
<td>PBS:</td>
<td>11</td>
<td>11</td>
<td>1 (4%)</td>
<td>2 (8%)</td>
</tr>
</tbody>
</table>

For this question Broadcasting's agenda appealed only to the affiliates. The independent managers, who usually agree with their commercial station counterparts, have set their own agenda for this issue. The PBS managers, who usually reject the commercial station agenda, have no taken no side at all on this question.

Since the "international" category placed well down the list in terms of the number of articles printed in Broadcasting, Question #32 is used here to ask the managers of the extent of their interest in international television. This was done in order to learn if such sparse coverage was warranted. Perhaps this topic is higher on the managers' agenda than on that of the magazine.
The majority of the managers (62 percent) say that they are "somewhat interested" in international television, with the percentages for this response fairly even among the manager groups (see table 34). "No interest" was the next most popular response at 28 percent, followed by "very interested" at 11 percent. Not surprisingly, the PBS managers rated highest in the latter category. Since a significant amount of PBS programming emanates from other countries these managers would be expected to take an interest in international television.

<table>
<thead>
<tr>
<th></th>
<th>Very interested</th>
<th>Somewhat interested</th>
<th>No interest</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total:</td>
<td>19 (11%)</td>
<td>109 (62%)</td>
<td>49 (28%)</td>
</tr>
<tr>
<td>Affiliates:</td>
<td>9 (8%)</td>
<td>71 (64%)</td>
<td>31 (28%)</td>
</tr>
<tr>
<td>Independents:</td>
<td>2 (5%)</td>
<td>25 (61%)</td>
<td>14 (35%)</td>
</tr>
<tr>
<td>PBS:</td>
<td>8 (32%)</td>
<td>13 (52%)</td>
<td>4 (16%)</td>
</tr>
</tbody>
</table>

The high response to "somewhat interested" was somewhat surprising, with both the noncommercial and commercial managers sharing the same agenda. This can be seen as an indication that international television is higher on the managers' agenda than on the magazine's.

The least popular category of all was "interview." These interviews, published periodically by the magazine, feature major management figures in the electronic media. Since the interviews are published infrequently, Question
#33 attempted to discover whether they were a popular feature of the magazine by asking the managers if they read the interviews.

Should Broadcasting learn of the results from this survey it may want to schedule more interviews, as 80 percent of the managers responded that they read them (see table 35). Managers in each group responded strongly in the affirmative to this question.

**TABLE 35.** Do you read the periodic interviews published in Broadcasting magazine?

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
<th>No response</th>
<th>Uncertain</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total:</strong></td>
<td>141 (80%)</td>
<td>18 (10%)</td>
<td>5 (3%)</td>
<td>13 (7%)</td>
</tr>
<tr>
<td><strong>Affiliates:</strong></td>
<td>90 (81%)</td>
<td>12 (11%)</td>
<td>2 (2%)</td>
<td>7 (6%)</td>
</tr>
<tr>
<td><strong>Independents:</strong></td>
<td>33 (80%)</td>
<td>2 (5%)</td>
<td>2 (5%)</td>
<td>4 (10%)</td>
</tr>
<tr>
<td><strong>PBS:</strong></td>
<td>18 (72%)</td>
<td>4 (16%)</td>
<td>1 (4%)</td>
<td>2 (8%)</td>
</tr>
</tbody>
</table>

In Question #22 the managers were asked if reading "Monday Memo" helped them in managing their stations, with the majority of the managers in each group responding "yes." Here, Question #34 asks the same question in reference to the interviews published in Broadcasting. In this case the managers have again responded "yes," with the figures even higher than in the "Monday Memo" question (see table 36). Overall, 70 percent of the managers who read the interviews felt that they helped in managing their stations. The network affiliates led the way with 76 percent, followed by the independents at 61 percent and the PBS managers at 56 percent.
TABLE 36.-- If so, do you feel that the views of the people interviewed help you in your job?

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
<th>No response</th>
<th>Uncertain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total:</td>
<td>98 (55%)</td>
<td>34 (19%)</td>
<td>30 (17%)</td>
<td>15 (8%)</td>
</tr>
<tr>
<td>Affiliates:</td>
<td>68 (61%)</td>
<td>20 (18%)</td>
<td>15 (14%)</td>
<td>8 (7%)</td>
</tr>
<tr>
<td>Independents:</td>
<td>20 (49%)</td>
<td>10 (24%)</td>
<td>5 (12%)</td>
<td>6 (15%)</td>
</tr>
<tr>
<td>PBS:</td>
<td>10 (40%)</td>
<td>4 (16%)</td>
<td>10 (40%)</td>
<td>1 (4%)</td>
</tr>
</tbody>
</table>

The difference between the subjects of Broadcasting's interviews and the "Monday Memo" authors is that the men interviewed tend to be among the giants of the industry, as opposed to the middle managers who write for "Monday Memo." Therefore, it is not surprising that the managers responded more favorably to this question. This strong response indicates that the managers place the value of these interviews much higher on their agenda than does the magazine, although it cannot be determined from this question whether the value rests in the content of the interviews or in the stature of the interview subjects.

Summary

Since the managers who responded to this survey come from a variety of different sized markets, from different kinds of stations, and have different managerial styles, among other characteristics, it was not expected that there would be either a total agreement or disagreement with the agenda of Broadcasting. A trend did develop in that managers from different kinds of stations tended to show a
consistency in the amount of their allegiance to the magazine's agenda. The network affiliate managers, for example, tended to support Broadcasting's agenda, as seen in the responses to questions concerning such controversies as the elimination of the Fairness Doctrine and the FCC's deregulation initiative.

The independent managers also generally supported the magazine's agenda, but to a lesser degree than the affiliate managers. At times they broke with the affiliate managers in their support, as seen in the question on support for the FCC's must-carry compromise. On the whole, however, it can be seen that the independent managers tended to agree with Broadcasting.

The PBS managers stood out from the other two manager groups in their tendency not to agree with the magazine. This was most notably seen in their response to the question on whether the managers agreed, in general, with Broadcasting's editorial commentary. Nearly two-thirds of the PBS managers said that they did not. Much of this type of discrepancy can be explained by the differences between noncommercial and commercial television stations.
CHAPTER FIVE

CONCLUSIONS

Introduction

The previous studies on agenda-setting have all concerned the effect of the media on the political process, or more specifically, on whether the media set the public's agenda in the election of candidates. This study is a great departure from those studies in that it eschews the political arena in order to discover if agenda-setting exists in other settings, in this case, whether Broadcasting magazine acts to set the agenda of local television managers.

The previous agenda-setting studies, having concerned themselves with political issues, dealt with subjects of a more concrete and emotional nature than those published in Broadcasting. Such politically-charged issues as law and order and civil rights are likely to evoke a strong opinion one way or the other. Furthermore, the media content involving such issues often features the opinions of the candidates running for office, who must take a strong stand-- in an election, impartiality would be taken as weakness. The voters, therefore, when exposed to these
opinions through the media, must align themselves with a particular candidate or party in order to cast a vote. Additionally, impressions of political candidates and their views are likely to be colored by a preference for one political party over another.

In contrast to an election situation, the content of Broadcasting does not demand an action from its readers, since they will not vote on any conflicts reported in the magazine. Although emotional issues, such as the ongoing dispute over the must-carry regulations, do sometimes arise, the issues of importance to the local manager, such as new technologies, programing, ratings, and the like, are not of an emotional nature. Unlike voters, who, by the process of casting their ballots, can act on their beliefs, the local television manager in many instances can only watch as events unfold. The manager cannot vote on FCC decisions or on the spread of satellite technology. His role, if he has one at all, is often small. In sum, it must be realized that because of the differences between voters and managers, the way in which each approaches the content of the media is different.

There is another difference in this project in that the study conducted by McCombs and Shaw measured the agenda-setting function of several media, including newspapers, television and magazines. Here, there is only one appropriate medium, the magazine. The local television
manager receives little information of professional interest from newspapers or television. As a result, this negates any comparisons between different media.

Although this project has its limiting factors, they are a necessary consequence of studying a select group of television managers as opposed to a more heterogeneous group such as the voting public. When this project was first visualized there was no certainty that the agenda-setting concept as developed by McCombs and Shaw would adapt itself to this kind of situation. This makes it difficult to compare the results obtained here with previous agenda-setting projects. Nevertheless, the hope is that the responses of the managers and the conclusions based on those responses will help in understanding the management processes at local television stations.

This study has assumed that Broadcasting is a major source of information for the managers, especially for events on a national scale. Although there are other sources available to the managers to obtain this kind of information, it was stated at the outset that Broadcasting is considered an established and highly respected authority on matters pertaining to television. It was later shown, through the results of the survey, that the managers attach some importance to reading the magazine by the fact that the vast majority of the managers described themselves as "regular readers." With these assumptions in mind it will
be taken that Broadcasting is the preeminent source of information for the managers and that their responses are in reaction to what they have read in the magazine.

The argument may be made that Broadcasting does not attempt to influence the thinking of its readers but merely tries to print what it believes its audience wants to read. Remembering the argument of Spiro Agnew concerning the newspaper editors who "live and work in geographical and intellectual confines," it is believed here that the editors of Broadcasting do not have the time nor the inclination to try and evaluate the individual agendas of managers scattered in more than four hundred cities across the country. These editors are based in the singular atmosphere of Washington D.C. and write for a magazine that has a long tradition of outspoken commentary. In the face of this it is clear that the editors have their own agenda to create.

Analysis of the results

In the previous chapter each question in the survey was discussed in terms of agendas. Did the magazine's agenda match that of the managers or did they differ? Did both the commercial and noncommercial managers agree or did one group side with the magazine's agenda and the other oppose it?

The first question in the survey ascertained the readership of Broadcasting. Since 94 percent of the managers said that they were regular readers of the
magazine it was assumed that the results obtained from the survey would make for an accurate comparison between the two agendas.

As the content analysis has shown, Broadcasting's agenda emphasizes the business aspects of the television industry. As a result, it's agenda features items that will promote a better business atmosphere. Broadcasting has pushed for an increase in the ownership limit of television stations. It has applauded the FCC's deregulation efforts, which free stations from time consuming and sometimes expensive regulations as well as giving the stations a stronger hold on their licenses. In the battle between broadcast and cable interests over the must-carry rules, the magazine has planted itself firmly on the broadcast side of the issue, as this side is most likely to financially benefit from must-carry.

Broadcasting's agenda also includes a healthy interest in new technological developments, such as SNG, HDTV, and stereo television. While these developments will be of benefit to the home viewer, they are also a part of television's drive to expand its audience and its revenue base. With this in mind it can be seen that Broadcasting is, in short, a cheerleader for the television industry. While it also promotes other media, such as radio and cable, its main concern is with television.

An examination of the relevant questions on the
survey shows that the affiliate managers' agenda corresponds highly with that of the magazine. On twenty-two of the questions (71 percent) the affiliate managers echoed, in varying degrees, the agenda put forth by Broadcasting. The affiliates disagreed with the magazine only on five questions (16 percent). As to the remaining four questions (13 percent), the managers' responses could not be determined to be either in agreement or disagreement.

The fact that the affiliate managers echo the editorial content of the magazine is not surprising. Network affiliates are the most common, and in most cases, the most prosperous type of television station. As affiliates they are linked to the centers of television power in New York and Los Angeles. Because the affiliates generate much more revenue than independent and noncommercial stations, it is not unusual that they share Broadcasting's philosophy of expanding the growth and profitability of television.

Since affiliates derive most of their programming from the networks it can be said that the network managers have a great deal of influence over the affiliates. And since the network managers are in close proximity to Broadcasting's staff, it is not difficult for the magazine's editors to communicate with the networks. Although Broadcasting may not necessarily write what it thinks its readers want to see, it would be foolish for the editors to ignore the network power structure.
The independent managers were also in agreement with Broadcasting's agenda. The independents matched the magazine's agenda on nineteen questions (61 percent), disagreed with the magazine on seven questions (23 percent) and took the middle ground on five questions (16 percent).

Independents have existed for as long as television itself, but it is only in recent years that independent stations have begun to expand in large numbers and exert more fiscal muscle. The primary differences between the affiliates and the independents in the survey were on such items as the use of people meters and certain stipulations included in the must-carry compromise. On the whole, the independents are beginning to closely resemble their affiliate counterparts, both in their programing and in their philosophy on how the television industry should be run.

At this point in time the independents are not guided or represented by a network structure, but that too is changing with the introduction of such organizations as the Fox Broadcasting Company and the emergence of such large station groups as the Tribune Company. As the independents have come to resemble more and more the affiliates they have come to more closely share their agenda, and with that, the agenda of Broadcasting as well.

The PBS managers are the lone dissenters of the managerial groups. They shared Broadcasting's agenda on
only eleven questions (36 percent). Fourteen times (45 percent) the PBS managers indicated that their agenda differed with that of the magazine, and on six occasions (19 percent) their response was too uncertain on which to base a conclusion.

As noncommercial stations it is unlikely that the PBS managers would share the magazine's agenda. The goals of commercial and noncommercial stations are too different to be otherwise. PBS stations are not profit-generating organizations. Their programing is selective and not concerned with capturing large audiences. Their income is derived from contributions and government funding. Rather than concentrate on the financial aspects of television the PBS stations instead focus on content, which excludes them from the philosophy of the magazine and the commercial stations.

The agenda-setting power of Broadcasting

Since this is a pilot study, with no previous studies to serve as guidance or reference, only tentative conclusions can be drawn. These conclusions, however, are based on evidence that supports the hypothesis that Broadcasting has some influence over its readers. Hopefully, the conclusions drawn here will be strengthened by future studies in this area. It is, nevertheless, the finding of this project that Broadcasting magazine does
have some agenda-setting function in regard to the managerial styles and philosophies of the local managers, especially those at commercial stations.

There is a high degree of agreement between the agendas of the affiliate and independent managers and that of the magazine, as seen by the responses to the questions posed. It is unlikely that so many managers in so many locations throughout the country could have arrived at a shared agenda by accident. The indications are that the managers have been influenced by a common source. The most likely source, as shown here, is Broadcasting magazine.

If it had been possible to administer a more complex and lengthy questionnaire this conclusion could have been proven to a greater extent. In the interest of assuring a high response rate, however, this was not possible. Subsequent studies may probe this aspect in greater detail. This survey, by developing a set of agendas for Broadcasting and for the local managers, and by showing the strong agreement between these agendas, has at least achieved a good indication of the agenda-setting ability of Broadcasting magazine. The ground has been broken for further studies to verify these findings.
APPENDIX A
TELEVISION MANAGER SURVEY

Name________________________ Station________________________ Affiliation________________________

1. Do you read Broadcasting magazine on a regular basis? _______Yes _______No

2. How long have you served in your present position? __________________________

3. How many television stations are owned by the owners of your station? __________

4. Do you believe that the present ownership limit of 12 television stations should be increased or decreased? _______Increased _______Decreased

5. If you are a network affiliate, how would you describe your interest in your network's ratings standing?
   _______Great interest _______Moderate interest _______Little interest

6. Which of the choices listed below most influences your station in the purchase of syndicated programing? (Check one only.)
   _______Trade shows _______Information and demo reels from syndication services
   _______Trade magazines _______Recommendation from national sales representative

7. Which type of programing would you say generates the most comment from your viewers?
   _______Game shows _______News _______Sitcoms _______Documentaries
   _______Dramas _______Children's programs _______No significant comment from viewers

8. Which professional associations do you belong to?
   _______NATPE _______NAB _______BRMA _______INTV _______None _______Other

9. Which, if any, trade conventions do you attend?
   _______NAB _______NATPE _______INTV _______None _______Other

10. Do you think that the Fairness Doctrine should be eliminated? _______Yes _______No

11. In general, do you approve or disapprove of the FCC's deregulation efforts?
    _______Approve _______Disapprove

12. Has your station been affected in any way by the U.S. Court of Appeals ruling declaring the must-carry rules unconstitutional?
    _______Yes _______No _______Additional comments________________________
13. Do you support the must-carry compromise developed by the FCC? Yes No

14. Is your station equipped for satellite news gathering? Yes No

15. If you answered "No," do your future plans call for the implementation of SNG equipment? Yes No

16. In your opinion, how would you rate the effect on your station of laws pertaining to broadcasting passed in the past year by the U.S. Congress? 
   Great effect Moderate effect Little effect

17. Has your station been involved in a libel suit in the past year? Yes No

18. If you answered "Yes" to the previous question, did you win or lose the suit? 
   Won Lost

19. Does your station use barter-syndication programs? Yes No

20. Does your station allow advertisers to run 15-second spots? Yes No

21. Do you read the "Monday Memo" column in Broadcasting magazine? Yes No

22. If you answered "Yes" to the previous question, do you find the views of the "Monday Memo" guest columnists helpful in managing your station? Yes No

23. Do you read the editorial page of Broadcasting magazine? Yes No

24. In general, do you agree or disagree with the editorial comments of the magazine? 
   Agree Disagree

25. Does your station use satellite dishes to downlink programing? Yes No

26. Is your station equipped to broadcast in stereo? Yes No

27. If not, do your future plans call for the installation of stereo equipment? Yes No

28. Has your station been refused carriage on a cable system because of the recent must-carry ruling? Yes No

29. How would you rate radio as a competitive force in your market? 
   Very competitive Somewhat competitive No competition

30. What ratings service(s) does your station subscribe to? 
   Nielsen Arbitron Other None
31. Do you support the use of "people meters" by the Nielsen service as a substitute for the present diary method of ratings measurement?

32. How would you describe your interest in television developments in other countries?  
   ____ Very interested  ____ Somewhat interested  ____ No interest

33. Do you read the periodic interviews published in Broadcasting magazine?  
   ____ Yes  ____ No

34. If so, do you feel that the views of the people interviewed help you in your job?  
   ____ Yes  ____ No

Thank you for your help in completing this questionnaire.
Chapter 1

1 This list is intended merely as a sample of the concerns that may be faced by the local television manager. It does not represent a complete list or a rank ordering of concerns as expressed by representatives of the television industry.


3 Ibid., p. 191.


6 Marcus, Broadcast and Cable Management, p. 9.

7 Ibid., p. 69.


9 It must be mentioned at this juncture that throughout this project the manager will sometimes be referred to as "he" or "him." This is done to avoid awkward phrases throughout the text and also because the majority of local managers are men.

Chapter 2


3Ibid.


5Ibid.


Chapter 3


2 Marcus, Broadcast and Cable Management, p. 4.


4 Marcus, Broadcast and Cable Management, pp. 7-8.


6 Marcus, Broadcast and Cable Management, p. 5.


Chapter 4


Chapter 5

Questions #1, #2 and #3 provided valuable information but did not readily lend themselves to analyzing the agendas. They were therefore eliminated from the analysis, leaving thirty-one questions with which to evaluate and compare the agenda of Broadcasting and the agenda of the managers.
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