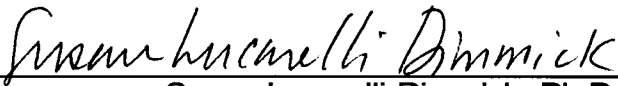


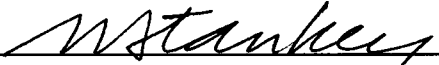
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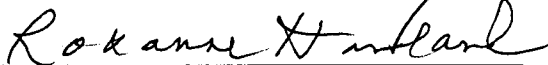
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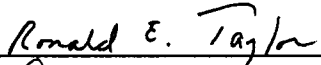


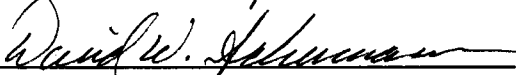
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and recommend its acceptance:









Accepted for the Council:



Associate Vice Chancellor
and Dean of The Graduate School

**Rites of Passage: The Advertising Trade Press' Framing
of the Diffusion of Cable Television**

**A Dissertation
Presented for the
Doctor of Philosophy Degree
The University of Tennessee, Knoxville**

Dale A. Brill

August 1996

97082003
12995
1-10-96 521-0610
(3042)

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DEDICATION

For Laurie, Mom and Dad.

With great appreciation for support, sacrifice, motivation and patience, this dissertation is dedicated to my wife, Laurie Dunton Brill, and my parents. Finishing my doctoral training and maintaining a normal life were often at odds with each other. This document marks the end of a shared accomplishment. If there were room for two names on the diploma, Laurie's would appear on the top.

Also, please know that between the lines of each page in this dissertation is the drive inherited from my parents who never turned their backs on a challenge. Now I begin yet another journey to be better than the average bear, always wearing a hat.

ACKNOWLEDGMENTS

These pages serve to record the impact that numerous people have made on my doctoral preparation. Some notes are offered as acknowledgment on a professional level, others are personal, and the distinction is hard to make.

Many thanks to Susan Lucarelli Dimmick for her role as chair. Her guidance was invaluable, knowing when to instruct and when to leave me to my own resources. The balance of my committee included academicians and teachers of great stature. Thanks to Ron Taylor for insight into everything. Roxanne Hovland's wit and human touch were always well timed. David Schumann continually offered enthusiasm and critical evaluation. And Michael Stankey became mentor and friend with incredible grace.

Special recognition also is due DeForrest Jackson. He is the model of professional achievement and integrity in the Ivory Tower. DeForrest may have done more to facilitate my development than any other individual. I hope my career in the classroom can emulate his dynamism and raw honesty. There was never a question who he was or what he thought. I will always remember the truism he uttered as we walked down the third floor hallway discussing what I thought had been a successful first semester teaching. Having declared Fall 1994 the start of a promising teaching career, he breathed between his teeth, "You'll never be that good again." Good teachers everywhere recognize the wisdom in his words.

Still others influenced my life during my training in Knoxville. The list below serves as a reminder to me of the privilege it has been to cross their paths. Each time I blow the dust from the cover of this dissertation, I will pause here to remember these

folks. Indeed, these pages should be the most worn of the entire document for it is here that readers will find the greatest contributions to the body of knowledge.

Joyce Wolburg

Elizabeth Scott

M. Mark Miller

David O. Rice

Donna Ballenger

Tiffany Welch

Analia Croci

Elizabeth Atwood-Gailey

Michelle Stankey

Bonnie Riechert

Grady H. Stokes

Karen Bunting

Ramiro Vasquez

Nikki McCray

Finally, thanks to Freddie Couples and Tom Watson, whose namesakes facilitated the development of a trophy friendship.

ABSTRACT

The purpose of this study was to examine the advertising industry's reaction to the introduction of a new communications medium. Cable television was chosen as the new medium. *Advertising Age* was chosen as the trade industry publication that would serve to gauge reaction to the medium. The text of *Advertising Age* formed the database from which potential frames were delineated and examined.

A time scale was constructed using the diffusion of innovations model. The time periods delineated by the consumer adoption cycle were constructed from consumer cable television subscription data as markers for possible shifts in advertising industry thinking about the viability of the new medium. It is reasonable to expect that the advertising industry pays careful attention to the types of media consumers use so that the industry can purchase human attention. The selective attention to different topics constitute frames. This study examined the advertising trade press' framing of the diffusion of cable television.

There were several findings. First, *Advertising Age* discussed the impact of cable television in business terms rather than cultural terms, giving rise to a commercial variation of futures rhetoric.

Second, there was a statistically significant co-occurrence between frames reflecting advertising industry concerns and consumer adoption cycles related to the diffusion of an innovation. *Advertising Age's* preoccupation with Regulation issues occurred during the Innovator and Early Adopter stages of diffusion of cable television, when there were few consumers using this new medium.

However, the emphasis in *Advertising Age* coverage shifted to Delivery issues in 1975, and this corresponded with shifts in consumer usage of cable television as reflected in the Early and Late Majority stages of diffusion.

These findings indicate that the use of consumer subscriber to cable television data to construct a time scale for gauging potential advertising industry frames and frame shifts was a viable demarcation for understanding and contextualizing advertising industry concerns related to acceptance and eventual adoption of the new medium by the industry itself.

The use of the diffusion of innovation paradigm to trace an industry's reaction to the introduction and eventual diffusion of a new communications medium has given rise to the idea that there may be a "rite of passage" that new media go through. This ritual, should it be documented to exist through careful retrospective studies of the diffusion of other media, could serve as a useful tool for gauging how and when an industry might itself adopt a new medium so that risks are minimized and advantages maximized.

The usefulness of frame and concept mapping to study industry reaction to a new medium also could be extended to the arena of issues management. This methodology has the ability to handle very large text-based data sets and can be used to systematize identification of issues and issue shifts important to organizations as they seek to stabilize the social, political and economic environments in which they operate.

PREFACE

There is unintended irony in the title of this dissertation. The completion of doctoral study, as the title reveals, also is a rite of passage. There is a story that has been part of my life since 1984 when I first served as a camp counselor in the North Carolina mountains. Well-timed readings helped me keep my sanity as I journeyed through my preparation. *Arnold*, by Martin Bell (1975), is offered here to future readers as a compass to keep study, reading and being a doctoral student in proper perspective. Regrettably, Salisbury Press, the publisher of the book from which this brief selection is taken, is no longer in business and the book is out of print. But I hope you'll agree the story is timeless.

Arnold. Once there was a bird with fur. He had a long yellow beak and pleasant green eyes. Everyone who knew him called him Arnold. But his real name was Bill.

Bill would never fly when he wanted to go somewhere. He was more than satisfied to shuffle along the ground at a leisurely pace. And sooner or later he always got where he was going.

Usually, when a group of his friends saw Bill shuffling quietly to or fro they would say, "Hello, Arnold!" And Bill would say, "Hello." And then after he was gone the whole group would spend a lot of time talking about all of the reasons why Arnold should fly instead of shuffle.

It made Bill happy whenever friends said hello to him. And he rather liked the name "Arnold," even though it wasn't his name. Interestingly enough, Bill didn't know that his friends thought he

should fly, because no one ever told him what they said when he wasn't there.

Now and then Bill was mistaken for a kitten. This was in part due to his appearance, of course. But it was also because he could, and did, purr whenever he wanted to.

Perhaps you have never seen a bird with fur that shuffles and purrs....Anyway, "Arnold," as he was called, enjoyed life immensely. And although he had only one possession, it was enough. I wonder if you can guess what he had? Would it surprise you to learn that Bill owned a wrist watch? Well, he did. On one furry wing Bill wore a tiny Timex brand wrist watch.

The watch didn't work. And so Bill never really knew what time it was. Still, he was always hopeful that someone might notice it there on this wing and ask, "What's the time?" Bill chuckled softly when he thought about his reply. Naturally, he would make up a time. And then without so much as blinking a green eye he would say, "It's 3:45." Or perhaps, "Ten-fifteen by my watch." He could decide on whatever time he wanted. Such fun to own a watch that didn't work.

Glenda the bobcat liked "Arnold." Ordinarily birds weren't safe when she was around. Not at all. But, as luck would have it, Glenda was terribly nearsighted. And she actually did think that Bill was a tiny bobcat. (You may be certain he had never indicated otherwise.) Whenever Glenda found Bill shuffling, she always carried him back to her lair by the fur of his neck. Then Bill would purr for a long while until Glenda went looking for food. When the coast was

clear, so to speak, he shuffled on about his own business—until she found him again, and the process was repeated.

During the various interludes between being found by Glenda and waiting for someone to ask about the time, Bill spent many a happy hour pretending to wind this watch. I say “pretending” because it is nearly impossible to wind anything with a wing. It wasn’t that Bill didn’t try. He just never succeeded.

Finally the day came when one of his friends approached him on behalf of the entire group who had been insisting that he should fly.

“Arnold,” he asked cautiously, “why don’t you ever fly?” It was Charles, the groundhog.

“Because flying is for the birds, Charles,” replied Bill, shuffling around a bit as if to emphasize the point.

“But you *are* a bird, Arnold,” the ground hog insisted. “And you really ought to fly. You’re making everybody uncomfortable.”

Bill was silent. He looked perplexed and lost in thought. Then, after a moment or two, he brightened up and said, “No, I don’t think so, Charles. I don’t want to fly. I’m sorry it makes you uncomfortable. Truly I am. However, flying is out of the question.”

“But, Arnold,” said the exasperated groundhog, “what shall I tell the others? You’re embarrassing all of us.”

“Tell them anything you want to, Charles. Just get the point across. No flying. I’m sorry.” Bill glanced at his watch. “Why, however did it get to be so late? It’s 8:37—past your suppertime,

Charles. Time for me to be on my way, too.” Bill seemed genuinely surprised and chagrined by the lateness of the hour. “Thank you for stopping, though. I know it took a great deal of courage to be spokesman for the entire group. Goodnight, Charles. Can you believe the time? Wherever did the evening go?”

After the confused groundhog had scurried off in order to make it home for supper, Bill sat down in the warm afternoon sun. He decided to make up a shuffling song to sing while moving about:

Shuffle, shuffle to and fro
I'll get where I'm going.
Never even have to know
Which way the wind is blowing.
I suppose that I could fly,
There's really nothing to it.
Still, I've always wondered why
A bird would want to do it.

There, that was a fine song. Bill smiled as he thought about Charles running home for supper. Then he placed both wings behind his neck and lay back in the grass for a short nap. “Shuffle, shuffle to and fro....” Soon, Bill was asleep. The afternoon sun warmed his fur and he dreamed an appropriate dream.

After a while he heard a voice behind him saying, “Hello, Arnold.” Slowly, Bill opened one eye. It was nearly dark. Evidently, he'd slept a good bit longer than he planned. “Hello, Arnold.” Bill turned in the direction of the greeting. It was a firefly acquaintance.

“Hello, Alice. Nice evening and all,” he said pleasantly.

“Arnold,” will you tell me what’s going on? Whatever did you say to upset Charles so? Why won’t you fly like you’re supposed to? And what are you doing lying here in the grass?” Alice seemed puzzled and concerned.

“Why, of course, I’ll tell you, Alice,” said Bill, dusting himself off and resuming an upright position. His green eyes reflected the firefly’s glittering. He blinked at Alice once or twice and then began.

“For the most part, I’m convinced that we forest animals—birds, groundhogs, even fireflies—take ourselves much too seriously. Each of us seems to believe that he or she has a certain set part to act out in some great big cosmic play. Incidentally, I don’t think that’s true, Alice. But, God knows, it might be. All I’m saying is that either way, it’s funny. If there really is a script, the whole idea tickles me. And if there isn’t any script at all, but we keep insisting on acting out a part that hasn’t even been assigned to us, then that’s hilarious.”

Alice looked distressed. “I don’t think it’s funny, Arnold. Everyone knows there is a script. And it’s very important that you act the way you are supposed to. Your part *has* been assigned.” Bill shuffled some. “Perhaps,” he said.

Alice waited for a minute or two and then she added, “Arnold, are you OK?”

“Oh, yes. Fine, fine. I was just thinking that I am more of a mind to believe the play isn’t composed until after the actors

themselves have created the script by what they say and do. I'm sure we take ourselves much too seriously, Alice." Bill pretended to wind his watch.

"Is that a wrist watch, Arnold?"

"Why, yes it is," Bill replied without looking up. "Yes, indeed. It is—a wrist watch. And a favorite possession of mine, too."

"What's the time?" Alice asked.

Without so much as blinking a green eye, Bill said, "It's nearly midnight. Eleven fifty-four to be exact."

"Gracious, Arnold! Are you sure? It doesn't seem that late."

"Am I sure? Oh, yes, certainly—11:54 exactly. It's always later than we think, you know." Bill looked up and blinked thoughtfully.

"Goodnight, Arnold," mumbled the bewildered firefly.

"Goodnight, Alice. And thanks for stopping."

That night Bill slept under the stars. He awoke feeling refreshed and even more delighted with his world than ever. For a while he pretended to wind his watch.

Shuffle, shuffle. To and fro. A bird with fur. A long yellow beak and pleasant green eyes. "I'm sure we take ourselves much too seriously," he mumbled while making an attempt to stand on his head. Then, upside-down, Bill saw Glenda the bobcat headed earnestly in his direction, and he immediately toppled over in silent laughter. "There can be no mistake about it," he thought. "We do take ourselves much too seriously."

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CHAPTER I

INTRODUCTION

The terms “Internet,” “web” and “browser” made their way from obscurity in technical journals to the popular press during the early 1990s. As early as 1994, the advertising community began wrestling with potential and uncertainties related to the commercial applications of the emerging medium (Wilder, 1994). Advertising agencies began exploring the Internet in response to market opportunities, which some pundits predicted would ultimately dismantle the traditional client/agency model. An excerpt from Michael Strangelove’s book, How To Advertise On The Internet, illustrates the prophecies of doom for advertising in the new media environment:

The advertising industry is on the verge of being shattered into a thousand fragments due to the knowledge explosion and the proliferation of new technologies. Grand theories no longer hold sway over the entire industry. Central theories, techniques, or laws can no longer be relied upon for commercial success. All the familiar categories of Madison Avenue have been destroyed by the postmodern marketplace (Strangelove 1994, p. 210).

While this rhetoric may be striking, it also is hauntingly familiar. Based on evidence of a repeating pattern across technological innovations, Carey (1989, p. 115) calls such

proclamations "the rhetoric of the electronic sublime." Historian Daniel Czitrom (1990, p. 679) warns that technological advances generate religiously inflected rhetoric.

The growth of the Internet has been phenomenal. Current estimates show the potential audience is between 15 and 30 million people across 60 countries (Sullivan-Trainor, 1994, p. 2). Advanstar Communications Inc. projects modem (a telecommunications device necessary for reaching on-line computer services and the Internet from home) penetration to be at 44.3 million American homes by the end of the year 2000 (Advanstar, 1994).

The rapid expansion of the Internet makes it hard to ignore. Communication researchers are witnessing the evolution of a new communication tool. The impact already has been felt on Madison Avenue. Chiat/Day advertising agency emerged as one of the first among a growing number of large agencies with an Internet presence. On June 29, Time Warner announced it had created a new unit called, "Digital Marketing Group," that will work with marketing-advertising agencies to create interactive ads. (Wall Street Journal, June 29, 1995).

Successful commercial development of the Internet (Net), specifically the graphic communications tool known as the World Wide Web (Web), is tied directly to the rate and likelihood of adoption by consumers. Advertisers, lured by audiences, watch carefully through the eyes of industry publications as the Internet environment develops toward some point of commercial viability.

Purpose and Significance of Study

Communication academics and practitioners with a sense of history might wonder how the diffusion of the Net is any different from the adoption of other media technologies in the past; this question is particularly material given the intense hype that has accompanied the introduction of the newest medium.

How is the diffusion of new media treated by the advertising trade press? Is blind enthusiasm or cautiousness a theme of trade coverage? Are there patterns or themes within this coverage? This dissertation suggests that answers to these and related questions can be found by examining the advertising trade press' treatment of a single commercial communication vehicle's diffusion, specifically cable television. The study also demonstrates the appropriateness of Frame Mapping as a means of understanding trade journal coverage of the diffusion process.

Focusing on a particular medium also allows more specific research questions: (1) Does futures rhetoric represent one of several themes emerging across time in the advertising press' coverage of cable TV? (2) Are time periods, specifically those defining the independent variables associated with diffusion adopter categories, characterized by distinct themes?

A contemporary examination of cable TV's diffusion (post-1986) remains to be found. This study uses textual analysis of published articles, the first application of this type in the long history of diffusion research. Finally, there are managerial implications in

the identification of stages in diffusion. At a minimum, awareness that a technology is maturing could alert managers to new technologies that may supplant conventional technology (Steele, 1989). Also, knowledge of how an industry assesses and reacts to new media can allow it to manage the process of technology adoption in a more orderly and cost-effective manner if it understands how new media technologies have been diffused in the past. Finally, this study is one of a number of studies in communication and information sciences that is using content analytic software to understand and manage the dynamics of consumer trends, issues and opinion cycles. In particular, what follows is an investigation of the trade rhetoric surrounding the introduction and eventual adoption of a new media technology.

Limitations and Delimitations

The goal of this study is to examine the framing of cable television (CATV) by the advertising trade press using published text. To evaluate every published article concerning CATV is neither practical nor feasible due to identification, indexing, availability and retrieval problems related to articles spanning 35 years. The research design employed here is limited to a census of archived articles from the leading advertising/media trade journal, Advertising Age. The study relies on published indices. Therefore, a few articles may not be included due to gaps in referencing and coding schemes during the original compilation by the index sources and later during the present author's retrieval.

In addition, this study assumes that the diffusion of cable television is complete. Adoption curves show that the number of new users has followed the traditional S-shaped curve illustrated in later chapters. While that curve demonstrates a leveling off of new users, the process has not entirely subsided.

CHAPTER II

HISTORY AND CHARACTERISTICS OF CABLE TELEVISION

In this section, a brief review of cable television is provided to give context to the study. One particular objective is to demonstrate that cable television (CATV) is a mature medium, having been the most recent communication technology adopted by the advertising industry, despite early skepticism.

The creation of CATV is tied directly to the technological limitations of broadcast television. As the 1960s drew to a close, televisions permeated the American landscape. By 1970 there were nearly 700 stations and more than 90 percent of American homes owned at least one television (Dept. of Commerce Statistical Abstract 1974). Geography seemed to be the only limitation on the penetration of television in America—a limitation that would spawn the use of coaxial cable to carry captured signals to individual homes. The application of cable to television broadcasting eliminated problems caused by blocked reception and the scarcity of local signals. Claims to the origination of cable television are shared by the Panther Valley Television Company in Lansford, Pennsylvania, and a similar genesis in the hills of Oregon, known then as Community Antenna Television; hence the original name and acronym for cable television: CATV. In Lansford, the Allegheny mountains blocked the reception of the few television owners in the area who bought their sets from Robert

Tarlton, an area appliance dealer. To solve the problem of poor reception, Tarlton placed a master antenna on top of a nearby mountain with coaxial cable running from the antenna along poles to his customers. The signal was excellent, and with the help of neighborly investors, business boomed. Panther Valley charged an installation fee of \$125, and \$3 per month (Smith 1972).

A 1948 FCC freeze on television station licenses also contributed to the need for cable. Areas that were not yet served by a local affiliate borrowed the programming from a nearby station to provide customers with much sought TV entertainment. During its early years, cable was providing television to homes that were unable to receive the network (and affiliate) broadcast using rooftop antennas. Service later expanded to include original programming. In 1952 there were 70 cable systems serving 14,000 subscribers (Steiner 1972).

Regulation and public policy issues played an important role in cable television history. A brief overview is provided here to demonstrate the impact of cable on the communications industry. With the help of microwave relay systems, CATV began to penetrate communities with one or more broadcast stations already in the vicinity. The broadcast industry protested the new competition in fear of diluted audiences and adverse effect on the supply-and-demand relationship that maintained higher advertising rates (Baldwin and McVoy 1983). Cable operators also were characterized as pirates who captured broadcast signals without charge only to redistribute them to subscribers for a fee.

There also were related public policy issues outside of the profit-centered interests of the networks. Television access for some rural areas may have been jeopardized entirely if a cable station collapsed because it was the economic base upon which single-provider stations depended. Undermining the economic support could have resulted in the loss of delivery rather than enhancing it (Baldwin and McVoy, 1983). Cable also was seen as a threat to the FCC support of UHF channels that had been adopted as a solution to station-scarcity in some areas. In response to network lobbying efforts, the Federal Communications Commission (FCC) imposed a ban on new cable operations in 1966. The FCC prohibited CATV in the top 100 broadcast markets if a UHF station, or even some group intending to build a UHF station, objected to CATV (FCC Dockets 14895, 15233 and 15921, cited in Baldwin and McVoy 1983, p. 169). The Cable Television Report and Order required cable systems to obtain an FCC Certificate of Compliance and set franchising standards. It limited carriage of distant signals and required carriage of local signals while protecting program exclusivity. In addition, the order required program origination and applied broadcast-type rules, required access channels, required 20 channels and two-way capacity, limited cross-ownership and set technical standards. The complex standards proved difficult to understand and compliance was ambiguous. The FCC subsequently issued a reconsideration order in 1972 and a clarification in 1974 (Baldwin and McVoy, 1983).

Regulation also sought to protect consumers against monopoly pricing and to ensure adequate access. Cable systems complained that the restriction placed on rates discouraged network expansion and development of programming. Other competitive pressures included the video cassette market and direct broadcast satellite systems. In response, Congress passed the Cable Communications Policy Act of 1984. The Act permitted franchising authorities to regulate basic cable rates only in those cases where the cable system was not subject to "effective competition" (Johnson, 1994).

The FCC defined effective competition to exist if three or more unduplicated broadcasting signals were available within a given service area (Johnson, 1994). Under such a definition, most cable systems qualified for rate deregulation. Nearly five years after deregulation the monthly rate for the lowest priced service rose by 56 percent, more than three times the rate of general inflation (Cable Television Consumer Protection Act 1992). The three-signal criterion under the 1984 Cable Act was revised to define effective competition as six unduplicated over-the-air broadcast television signals or where an independently owned, competing multichannel video delivery system is available to 50 percent of the homes. passed (Johnson, 1994). This adjustment proved insufficient to rein in rising cable fees.

Again in 1992, Congress passed legislation that attempted to protect consumers. The Cable Television Consumer Protection and Competition Act of 1992, passed over presidential veto, extended stricter criteria for effective competition. Effective competition was defined as existing where (1) fewer than 30 percent of the households

in the area take cable service, or (2) the area is served by two or more unaffiliated multichannel video distributors, each offering comparable programming to at least 50 percent of the households, with at least 15 percent of the households subscribing to a service other than that of the largest distributor, or (3) a competing provider offers service to at least 50 percent of the households within the franchise area (Johnson, 1994). It provides that where effective competition exists, cable television rates shall not be subject to government regulation. In the absence of effective competition, regulation is to be undertaken jointly by the FCC and by state and local governments.

Cable Television Hardware and Delivery

All cable systems have three basic features: the 'headend', the cable network and the subscriber terminal. The headend is the nerve center of the cable system. It includes instruments to receive signals from broadcast TV, satellites and local stations. The headend re-transmits the signal along a coaxial wire to the subscriber. The greater the number of receivers at the headend, the greater the number of programs that can be sent down the line. The channel capacity depends on the type of cable used. The cable transmission has the capacity to be interactive. That is, rather than the one-way transmission of network broadcast, cable subscribers can send a signal back through the system using a keyboard attached to the home TV set. This application is still relatively underutilized. For example, interactive games or product ordering could take place entirely over the cable connection. The involvement of the viewer is the linchpin in making viewing truly interactive.

The network consists of the cable itself, which is either buried underground or run along existing telephone or utility poles. The network can use either coaxial or fiber optic cable or a combination of the two. Coaxial cable is a copper wire surrounded by plastic foam and mesh sheathed in an outer cover to protect the copper wire from weather and interference. Standard coaxial cable has a capacity of 50 channels (Steiner, 1972).

Optic fiber cable is much newer and technically superior to copper wire. Unlike coaxial cable, which transmits signals by electrical impulses, optic fibers use bursts of light. The major technical attractions of optic fiber is the ability to carry signals over longer distances, nearly limitless capacity, and immunity to electrical interference. The technology to deliver optical fiber has been feasible since the early 1980s, only economic and profit considerations have prevented fiber-based wiring to the home from completely replacing copper (Englebert, 1995).

A recent technological innovation further extends the capacity of copper lines to 500 channels. Asynchronous digital subscriber lines (ADSL) technology uses advanced signal compression to enable the existing copper line to carry several times the number of current channels. Each television set connected to ADSL service requires a decoder that decompresses the digital signal and converts it to analog. These systems are still being field tested (Cox, Manley and Chea, 1995).

The final hardware component of a cable system is the subscriber terminal that connects the TV to the cable. The subscriber selects the desired program by turning to

the appropriate channel. This terminal is often called a converter box because the cable transmission is scrambled to reduce the pirating of cable signals. The converter box unscrambles the coded signal to the appropriate standard analog transmission signal. Converter boxes are addressable. Subscribers are offered a multitude of channels and the cable operator can control which services a subscriber receives without making service calls to the home.

Advertising

Throughout its early history, advertisers watched carefully as the audience for cable television grew. Subscription data would prove to be the only audience measurement tool at its disposal. In 1969 MSGN became the first advertising-supported cable TV service (Media FactBook, 1994). By 1970, 5.1 million people subscribed to basic cable television (Kagan, 1990). The use of cable systems to deliver non-network programming began in the 1970s.

On the local level, advertising served the same purpose for supporting programming on cable stations as it did for the networks and affiliate stations. Early CATV systems sold advertising to defray the costs of local sports and other events made necessary by the FCC franchising regulations. The sponsorship was solicited per event. Alpha-numeric channels also provided a source of advertiser revenue for cable companies. Sponsorships of weather, news or classified service often included a crawling "billboard" across the bottom of the screen.

Between 1969 and 1979, 14 advertising-supported stations were delivered via cable distribution, the first dominated by affiliates extending their reach to national levels. For example, the “superstations” (Ted Turner’s TBS, 1976 and Chicago’s WGN, 1978) signaled the arrival of cable as the spoiler of network dominated television. In 1979, eight cable-specific stations emerged: C-Span, Nickelodeon, Tempo, WOR, Learning Channel, ESPN, UNI and GLAVISION (Kagan, 1990). These larger networks accumulated revenues in a manner similar to magazines with a combination of subscription and spot advertising. By 1994, the top 100 companies by advertising expenditures had generated more than \$2.3 billion in cable network advertising alone (LNA/MediaWatch, 1994).

By 1995, more than 60 million Americans had CATV. Cable television had survived the attacks of the dominant broadcasting lobbies; and negotiated federal, state and local regulation. It also altered the viewing habits of consumers to become a mass communication medium with sufficient audience to attract significant advertising revenues. Figure 1 illustrates the typical S-shaped diffusion curve created from graphing the rise in total CATV subscribers over time.

National and regional advertisers have capitalized on a highly fragmented audience resulting from the multi-channel offerings of cable television. The opportunities for continued fragmentation appear limitless with recent increased channel capacity of cable now extended to 500 channels. The chief question remains how the demand for content will be filled.

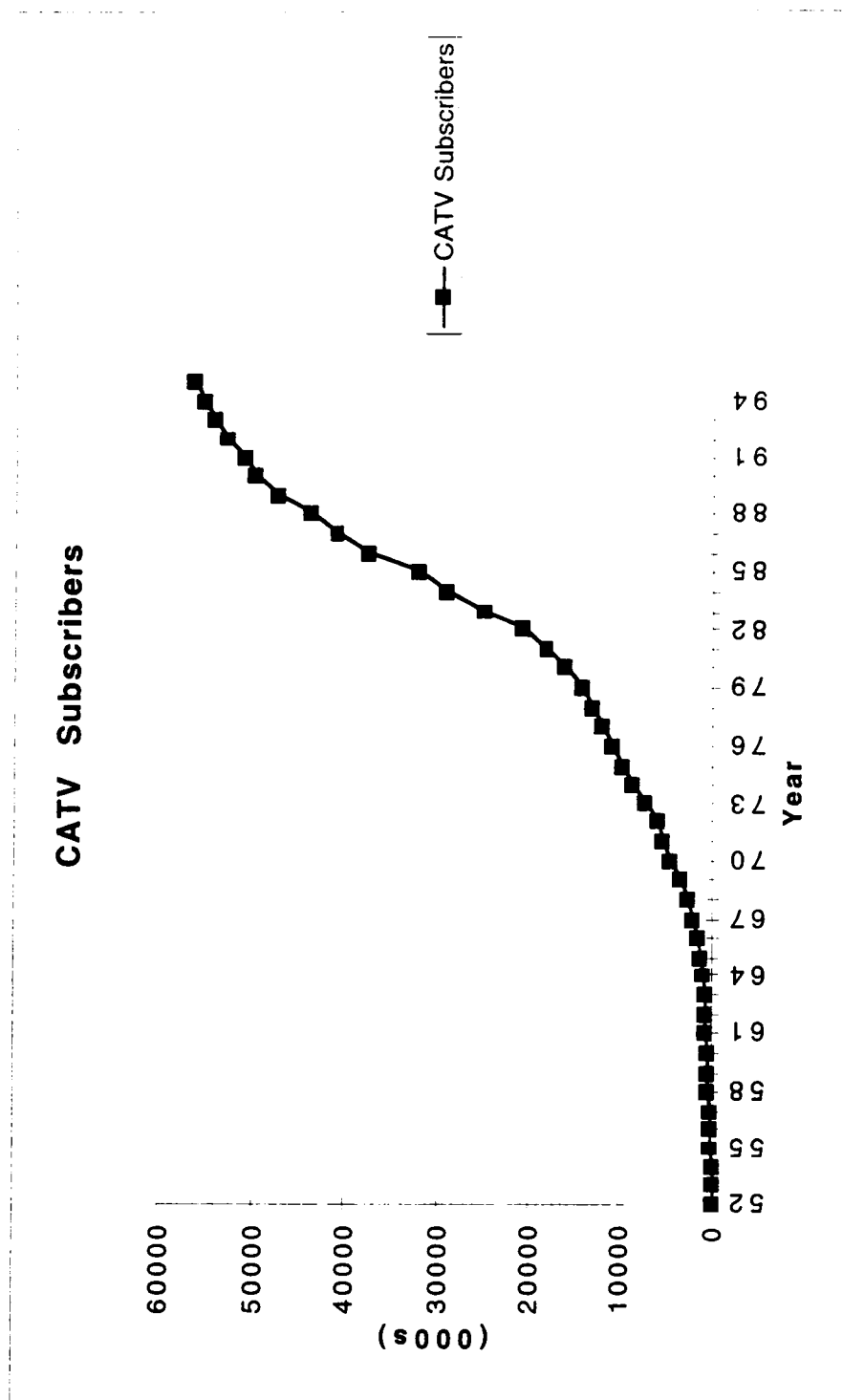


Figure 1
S-Shaped Diffusion Curve of CATV Subscribers

CHAPTER III

REVIEW OF LITERATURE

In this section, several objectives are addressed. First, the development and contribution of frame analysis in communication studies is assessed. Second, scholarly thought related to at least one particular theme demonstrated to correspond to the early stages of media introductions is reviewed. Third, the current level of understanding in the diffusion of innovations literature is assessed.

Framing

“A frame is a central organizing idea for making sense of relevant events and suggesting what is at issue” (Gamson 1989, p. 157). The earliest work in framing is grounded in Goffman's Framing Analysis: An Essay on the Organization of Experience in 1974, an article that explores how the human mind continually works to make sense of the world that surrounds it. Complicated issues are often reduced to some common denominator and meaning. As the research stream grew, researchers examined how portions of messages are retained, others deleted as we give attention to some aspects of reality while obscuring other elements (Entmann, 1993).

Framing is a term applied to the process of emphasizing or giving exclusive attention to certain aspects of experience. The work of numerous authors has taken up the question of framing and provided a variety of conceptualizations.

Goffman (1974) sees frame analysis as a way in which scientists can understand how people deal with the question, "What is it that's going on here?" Riechert (1996) traces the connection from Maher (1994) who credits Bateson (1972) and Goffman (1974) as the first to use the term "frame" as a construct for how individuals organize experience.

Entmann (1991) identifies four locations in the communication process where framing occurs: the communicator, the text, the receiver, and the culture:

Communicators make conscious or unconscious framing judgments in deciding what to say, guided by frames (often called schemata) that organize their belief systems. The text contains frames, which are manifested by the presence or absence of keywords, stock phrases...that provide thematically reinforcing clusters of facts or judgments. The frames that guide the receiver's thinking and conclusion may or may not reflect the frames in the text and the framing intention of the communicator. The culture is the stock of commonly invoked frames exhibited in the discourse of talking and thinking of most people in a social grouping (p. 52-53).

The study of framing need not be limited to the ultimate impact on public opinion, according to Gamson and Modigliani (1989), who suggest that researchers may study one or the other apart from the relationship between the two. Frame analysis from the receiver's perspective introduces the problem of multiple meanings (Graber, 1989). However, content analysis—the methodological family to which frame analysis

belongs—avoids this dilemma by focusing on the “preferred reading” of the story line; that is, the meaning intended by the sender (Gamson, 1989):

We know from years of content analysis that it is difficult, if not impossible, to get adequate reliability with such a genotypic category as a frame or story line. But by identifying the particular signature elements for a given frame—the metaphors, catchphrases, or other symbolic devices typically used to convey it—it is possible to find phenotypic expressions that can be reliably coded.

Framing is an ever changing process. Gamson (1985) calls attention to the ensuing struggle as frames compete against each other rather than existing as a static state.

Tuchman made the connection between framing as an organization principle for events and the use of framing by journalists, "As frames, news stories offer definitions of social reality" (1976, p. 94). The story becomes a place in which journalists construct portions of the world using events "in which they can locate themes and conflicts of a particular society" (p. 93).

According to Tuchman, the events and themes that are given focus by media practitioners imparts in them the power to frame and reframe issues on behalf of the public:

For so long as hard news continues to be associated with the activities of legitimated institutions and the spatial and temporal organization remains embedded in their activities, news reproduces

itself as an historical given. It not only defines and redefines, constitutes and reconstitutes social meanings; it also defines and redefines, constitutes and reconstitutes ways of doing things—existing processes in existing institutions (Tuchman 1978).

Gans (1979) investigated the selection and framing of news on *CBS Evening News*, *NBC Nightly News* and *Time* and identified a recurring pattern of news about a fairly small number of actors and activities. Gitlin (1980) conducted qualitative analysis of news coverage of the Students for a Democratic Society. He observed that some themes were emphasized and others were neglected, and that the emphasis and neglect had great impact on the organization's outcome:

...the mass media produce fields of definition and association, symbol, and rhetoric....The forms of coverage accrete into systematic framing, and this framing, much amplified, helps determine the movement's fate (p. 2 - 3).

Representative studies can be found such as Goshorn and Candy's (1995) investigation of race discrimination in the press, which identified the dominant framing of minorities that prevailed in media accounts. Rachlin (1990) accounts for dominant frames in the political arena, identifying news accounts as sources for hegemonic society.

The selective nature of framing, particularly as conveyed in the media, is of chief importance to this study. It will be argued in a later section that frames in media

trade press represent important markers in the adoption process of new media. As

Gitlin (1980) posits:

Media frames are persistent patterns of cognition, interpretation, and presentation, of selection, emphasis, and exclusion, by which symbol-handlers routinely organize discourse, whether verbal or visual....Any analytic approach to journalism—indeed, to the production of any mass-mediated content—must ask: What is the frame here? Why this frame and not another? What patterns are shared by the frames clamped over this event and the frames clamped over that one, by frames in different media and in different places at different moments? (cited in Riechert 1996).

As interest in frame analysis progressed, a growing consensus developed about conceptualizing frames and framing. Also present was a continued call for greater sophistication in measuring content and text. Williams, Shapiro and Cutbirth (1983) applied traditional content analysis and telephone surveys in two studies of the 1980 presidential campaign. Frames were seen as contexts and as a particular point of view. Hornig (1992) investigated the proposition that science and technology can be seen in four distinct frames by lay readers. Gamson and Lasch (1983, p. 398) describe a frame as "suggesting a central organizing idea of understanding events related to the issue" that include metaphors, depictions and visual images. The authors call for future research on the "ebb and flow of prominence and media usage over time" (p. 143).

In his study of American news coverage of the 1983 Soviet shooting of Korean Air Lines Flight 007 and the 1988 United States' shooting of Iran Air Flight 655, Entmann (1991) describes the existence of news frames at two levels: (1) as mental organizing principles for information processing and (2) as characteristics of news text. The author offers a very strong argument that is particularly relevant to the foundation of this study as to the worthiness of media text as a data source and the relative importance of identifying frames in their own right:

News frames are constructed from and embodied in the keywords, metaphors, concepts, symbols, and visual images emphasized in a news narrative. Since the narrative finally consists in nothing more than words and pictures, frames can be detected by probing for particular words and visual images that consistently appear in a narrative and convey thematically consonant meanings across media and time. By providing, repeating, and thereby reinforcing words and visual images that reference some ideas but not others, frames work to make some ideas more salient in the text, others less so—and others almost entirely invisible (p. 7).

Entmann further emphasizes that the key elements in news frames include amount, prominence, and duration of coverage, which in sum can be taken to suggest the importance of an event (p. 9).

Tankard, Hendrickson, Silberman, Bliss and Ghanem (1991, 1992) see the concept of framing as an increasingly important area for research in mass communication: "Framing appears useful to researchers as a means of referring to how

an event is portrayed in a particular news story." In their review, the authors draw from earlier definitions of framing from Tuchman (1978), Goffman (1974), Gitlin (1980), Gamson (1989), and Graber (1989) to conclude: "A frame is a central organizing idea for news content that supplies a context and suggests what the issue is through the use of selection, emphasis, exclusion, and elaboration" (Tankard, et. al.).

Coleman, Bacaltchuk and Lathrop (1993) studied coverage of conflict at a copper mine in six daily and four weekly newspapers. They define frames as "interpretive packages that capture the central focal points of news stories. Frames should tell us the essential nature of a news story—what the story is all about." Coleman (1994) discusses how news is "framed by reflecting the ideological rhetoric by claimsmakers and argues that framing refers to the central ideas found in news, which she used "interchangeably with story 'theme'" (pp. 51, 52).

A Problem of Measurement. Tankard, et. al. (1991) suggest that a particular problem in studying media framing is the absence of rigorous methods for determination of what frames are being used in articles. "There may be a tendency for researchers to find the frames they are consciously or unconsciously looking for. At its worst, this would mean researchers would see only the one frame that they are sympathetic to or are expecting to see." The Tankard study introduces a list-of-frames approach in an effort to anticipate possible frames in conjunction with traditional content analysis methods to consider news framing of abortion issues. They compare

list-of-frames approach with the media-package approach employed by Gamson and Modigliani (1989) and the multidimensional-approach used by Swenson (1990).

Tankard, et. al. (1991) identify two recurring difficulties with all three methods: (1) frames and frame elements must be redefined for each topic being studied and (2) that intercoder reliability is less than perfect.

Hendrickson (1994) observes the difficulty of coding and measuring frames reliably, citing the potential interference by the researcher's existing schema. She calls for continued research employing the media framing concept, but warns of the importance of rigorous methods and checks.

In a review of findings and methods of studies in media frame analysis, Maher (1994) raises the critical question, "If framing is indeed as significant an influence as Goffman, Gitlin, Tuchman and others have suggested, why has it not been reliably measured?" (quoted in Riechert, 1996).

Recent studies by Miller and Riechert (1994), Andsager and Miller (1994), and Riechert (1996) introduce an answer to the problem of measuring frames. All three studies employed unique applications of Frame Mapping, a multidimensional scaling system developed by Miller (1995a, 1995b). The researchers studied frames identified by themes in media coverage. In her doctoral dissertation, Riechert (1996) uses hierarchical cluster analysis and frame mapping in studying framing. The methodology

from these studies is modified for application in this report and will be discussed in detail in a later section.

In addition to measurement issues, a problematic area is the diverse use of the term frames in recent research. Hendrickson (1994) suggests that news frames and themes are interchangeable terms; Gamson uses themes in his research. Entmann (1993) refers to frames as manifest in thematic clusters. Priest (1995) refers to "thematic emphasis" as a framing effect. In this study key terms that occur together prominently in text are identified as themes. Themes that occur together in articles with rational and objective consistency are considered frames. Frames may encompass more than one theme as themes encompass several component key terms. The basis for rational and objective consistency is addressed in later sections.

Miller and Riechert (1994) employed the computer-based Frame Mapping procedure to identify differences in relative prominence in major themes among articles mentioning pesticides in *Time*, *Audubon*, *Nutrition Today* and *Successful Farming*. Riechert (1996) used Frame Mapping to identify major themes in news releases from conservation and property-owner groups mentioning wetlands, such the National Audubon Society and the American Farm Bureau Federation. The identified themes were demonstrated to represent frames of the respective advocacy groups and then employed to investigate the relationships among the use of different stakeholder

advocacy groups as news sources, whether stakeholder was mentioned or quoted, and prominence of stakeholder frames in the news media.

Both studies demonstrated the usefulness of the Concept Mapping procedures to investigate themes and frames. Riechert (1996, p. 33) argues:

Methodologically, the Concept Mapping procedures offer important improvements over traditional approaches to identifying and comparing themes in text. With Concept Mapping, (1) the themes are specified by the text itself, thereby avoiding the potential problems of measurement validity and coder reliability; and (2) methods of measuring and comparing relative emphases in text are precise. The Frame Mapping application of the Concept Mapping Procedures...appear to provide a welcome answer to the call by Tankard, Maher, Gamson, and others for an effective method of conducting frame analysis.

Technology Rhetoric and the Culture of New Media

One demonstrated result of technological innovation in media results in what historian Daniel Czitrom calls “a religiously inflected rhetoric celebrating moral, political, and social improvements” (1990, p. 679). The American infatuation with technology paints the backdrop for understanding the fascination and anticipation created by new media technologies. The dominant metaphor for the relationship between technology and Western civilization is religion. Quoting Landgon Gilkey, Martin Meduhurst refers to the American faith in man’s abilities to solve its problems

through technology as the “implicit religion of the West” (Meduhurst, Gonzalez and Peterson, p. x). Stanley Jaki (1988) makes the connection directly to theology:

Those mindful of that omnipotence that has been traditionally ascribed to God, will not fail to think of theology on hearing some engineers declare that man, by virtue of technology, can do almost anything (p. 40).

The advent of electricity heightened expectations and charged the enthusiasm of its technological disciples. Electricity promised the marvels that mechanization alone could not bring: freedom, decentralization, ecological harmony and democratic community (Carey 1989). Borrowing from Leo Marx’s “rhetoric of the technological sublime,” Carey coins the phrase “rhetoric of the electronic sublime” (p. 123) to describe the carry-over of Marx’s rhetoric to technology now powered by the mysterious electricity.

Edison, Morse and Bell harnessed electricity in the name of communications, and the rhetoric of the electronic sublime focused its eye on media technology. The list of technological advocates is long. Several authors have succeeded in achieving notoriety for their prophetic views, such as Alvin Toffler who gave us Future Shock (1976) and The Third Wave (1989). John Naisbitt’s MegaTrends (1986) continued the tradition of futurology shared by a variety of groups: the major engineering societies, leading corporations with global stakes in high tech, universities looking for substitutes

for declining federal support, the military seeking to augment its share of the gross national product, and the State Department.

The rhetoric of the electronic sublime, as identified by Carey and Quirk (1989), is a telling characteristic of what American sociologist and economist Thorstein Veblen called “technological determinism.” Chandler (1995a) identifies the technological deterministic focus on technology, and media innovation:

...new technologies are the primary cause of [a] major social and historical changes at the macrosocial level of social structure and processes; and or [b] subtle but profound social and psychological influences at the microsocial level of the regular use of particular kinds of tools (p. 1).

During the 1700s the path of history was inextricably tied to the idea of continuous progress by the educated of the time (Chandler, 1995b). Lewis Mumford (1971) describes their radical doctrine: “...those who favoured progress simply-mindedly believed that evils were the property of the past and that only by moving away from the past as rapidly as possible could a better future be assured” (p. 199). Purcell (1994, p. 38) refers to a “mystical, semi-religious faith in the inevitability of progress.”

Chandler (1995b) demonstrates the language of the technological determinists, who commonly speak of the latest innovation as a “dramatic and ‘inevitable’ driving force, the ‘impact’ of which will ‘lead to’ deep and far-reaching ‘effects’ or

'consequences'." Large (1980) is another futuristic commentator who refers to "the microelectronic revolution."

Technological determinists are not exclusively enthusiastic. To be sure, there have been dissenting voices combating the utopian future rhetoric. For example, Jacques Ellul (1964) portrays technological determinism in terms of a conspiracy, where any particular technology is viewed as autonomous with a will of its own.

Henry David Thoreau warned against a mechanistic and fatalistic outlook as a result of improvements in technological means. His poetry gives balance to the period's rabid fascination with the railroad:

What is the railroad to me?
I never go to see
Where it ends.
It fills a few hollows.
And makes banks for the swallows.
It sets the sand a-blowing.
And the blackberries a-growing (Thoreau 1873).

So with both optimistic and pessimistic overtones, broad social effects have been attributed to many communications technologies before our current computer-based information technology. Marvin (1988) argues that "new technologies" is a historically relative term:

We are not the first generation to wonder at the rapid and extraordinary shifts in the dimension of the world and the human relationships it contains as a result of new forms of communication, or to be surprised by the changes those shifts occasion in the regular pattern of our lives. If our own experience is unique in detail, its structure is characteristically modern (p. 3).

The dialectic nature of technology-rhetoric provides the first hint that the diffusion of new media is an evolutionary process:

For each medium is a matrix of institutional development, popular responses, and cultural content that ought to be understood as a product of dialectical tensions, of opposing forces and tendencies clashing and evolving over time, with things continually giving rise to their opposite (Czitrom, 1990, p. 184).

The literature points to a rhetoric of the electronic sublime as a theme appearing in public discourse about new technology and new media. The question remains, what happens after the clash between utopian promises and prophecies of doom? Are their patterns to the issues that follow? There is evidence from cultural researchers to answer in the affirmative. Carey (1980) argues his point that rhetoric documenting these reoccurring revolutions in media demonstrate identifiable patterns:

In short, each new form of communication is seen as affecting a revolution in social life, though the consequences of that revolution are differentially evaluated. Whether we are speaking of the telegraph, or telephone, or transatlantic cable, or motion picture, or radio, or television, the same rhetorical patterns of interpretation and evaluation emerge. Therefore, it should come as no surprise that in the late sixties

and early seventies, when the first premonitions surfaced that industrial patterns in communications were becoming unglued, a new though predictable body of prophecy emerged heralding the “communications revolution.”

In what context should this rhetoric and the impact of its focal medium be evaluated? Elizabeth Eisenstien (1983), whose research analyzed the impact of the first communication’s revolution, the printing press, suggests that perhaps the most important focus for studying the impact of a new communications medium should fall on the cultural matrix in which technology is embedded. Marvin (1988) concurs, identifying an alternative perspective on new media adoption. A lengthy quote is appropriate in using Marvin’s work to establish boundaries for this study:

Here, the focus of communication is shifted from the instrument to the drama in which existing groups perpetually negotiate power, authority, representation, and knowledge with whatever resources are available. New media intrude on these negotiations by providing new platforms on which old groups confront one another. Old habits of transacting between groups are projected onto new technologies that alter, or seem to alter, critical social distances. New media may change the perceived effectiveness of one group’s surveillance of another, the permissible familiarity of exchange, the frequency and intensity of contact, and the efficacy of customary tests for truth and deception. Old practices are then painfully revised, and group habits are reformed. New practices do not so much flow directly from technologies that inspire them as they are improvised out of old practices that no longer work in new settings. Efforts are launched to restore social equilibrium, and these efforts have significant social risks (p. 5)

Marvin points to a very broad cultural landscape. From this vast horizon of communication-related groups, within which old and new practices are negotiated in cultural transition, researchers have explored the cultural, social and economic impacts of information technology and (1) culture at large and the audience (McLuhan, 1960, 1962; Carey, 1989; Carey 1980; Innis, 1971) (2) orality vs. literacy (Ong, 1982), (3) the democratic process (Emord, 1991; Schudson, 1992), (4) the free market system (Gasman, 1994), (5) the First Amendment (Emord, 1991; Diamond, Sandler and Mueller, 1983; Pool, 1983; Powe, 1987), (6) the news industry (Bagdikian, 1971), and (7) the printing press (Eisenstein, 1979). What's missing from the above list of studies on technology is a focused investigation of the relationship between media innovation and the advertising industry. This study begins such an effort.

The history of new media and the advertising industry are intimately and inextricably linked. Advertising has permitted the creation and support of the lion-share of new media. Of the annual \$166 billion investment in the media system (excluding media that are all advertising), 70 percent is represented by media that depend on advertising for a significant part of their revenue, and half is actually paid by advertisers (Bogart, 1995). The relationship is the foundation of what Bogart refers to as the "commercial culture" of media:

Media organizations work hard to generate audiences. They do so not as an end in itself, but because audiences are the commodity they

sell to their real customers. The structure and content of most of the major media are profoundly affected, if not media structure and content is entirely instrumental and pragmatic. Advertisers have no functional concern with the meaning or consequences of mass communication except insofar as it provides a mechanism for the delivery of their messages to prospective buyers of their wares. This has three important consequences: (1) it makes advertising a significant component of the public's communication experience; (2) it affects judgments that shape nonadvertising content; and (3) it controls the life and death of individual media (Bogart, 1995, p. 71).

Summary of Technological Determinism and the Culture of New Media.

Cultural research and historical commentary points to an inflected rhetoric that appears at the advent of new technologies. What follows is an evolutionary process in which groups are vying for control. The commercial culture of media provides a backdrop for investigating the changes and shifts occurring within the advertising industry. The advertising trade press provides a window into that culture. A broad research question emerges from this intersection of technological rhetoric and cultural shifts in the advertising industry. Is futures rhetoric a theme appearing in advertising trade press coverage? What other issues emerge? Relying on published text as documentary evidence, issues can be traced as they ebb and flow in dominance across time. Frame analysis provides a means of evaluating those themes. What remains is a logical time frame from which the diffusion of cable television might be monitored.

Diffusion of Innovations

There is perhaps no better developed research stream in social science than diffusion of innovation. The paradigm, synonymous with the name Everett Rogers, has generated more than 3,890 studies since the 1940s. Rogers' career work has produced numerous individual studies in addition to four editions of the definitive monograph, The Diffusion of Innovation and a monograph dedicated to the emerging new media, Communication Technology: The New Media in Society (Rogers, 1986).

The diffusion of innovation tradition includes several models, each focusing on a different view of the diffusion process. Of particular interest in this study are the five-stage time periods used as the independent variable in the descriptive adopter categories framework. A brief review of the different diffusion models are given to give context to the time category framework and to establish this study as a unique contribution to the diffusion of innovation literature.

One particularly underdeveloped area of diffusion research is the consequences of innovation, which is defined as the changes that occur to an individual or to a social system as a result of the adoption or rejection of an innovation (Rogers, 1995, p. 440). This research has only recently gained the attention of scholars, chiefly those in cultural studies. Consequences can be characterized as functional and dysfunctional. The latter classification draws attention to the fact that not all diffusion processes (or technological transfers) are desirable. For example, Gonzalez and Bradley (1990) demonstrate the

resistance to print technology in the oral culture of the Aromas Indians of Nuevo, Mexico. The authors argue that accountability in technology transfer can be facilitated only when the notion of “aftermath” becomes an integral dimension of the transfer process. The impacts of personal computers are evaluated by Dutton, Kovaric, and Steinfeld (1985). Robinson (1977) researched the impact of television on time allocation (1977).

Greater attention has been paid in diffusion research to the innovation-development process. It encompasses the decisions and action, and their respective impacts, occurring from recognition of a need or a problem through research, development, and commercialization of an innovation, through diffusion and adoption of the innovation by users, to its consequences (Rogers, 1995, p. 132). The innovation-development process is potentially the broadest of the diffusion frameworks encompassing the consumer-adoption process and consequences within its boundaries. However, management literature often concentrates on the internal processes of innovation development. For example, Steele (1989) evaluates the management of technology through functional areas in an organization, including basic research, applied research development, design, construction, manufacturing, testing maintenance and transfer. Davenport (1993) diagrams the new product-development process as beginning with needs analysis and ending with the start of production.

Another framework is the innovation-decision process: The process through which an individual or organization passes (1) from first knowledge of an innovation, (2) to forming an attitude toward the innovation, (3) to a decision to adopt or reject, (4) to implementation of the new idea, and (5) to confirmation of this decision (Rogers 1995, p. 161). Knowledge occurs when the individual is exposed to an innovation's existence and gains some understanding of its use. Persuasion occurs when either a favorable or unfavorable attitude is formed. Decision is defined as activity(ies) that lead to a choice to adopt or reject the innovation. Implementation occurs when the innovation is put to use. Finally, confirmation is characterized by seeking reinforcement for the decision already made. Reversal may be an alternative confirmation process where the individual reverses the previous decision when exposed to conflicting messages about the innovation.

In a classic study, Beal and Rogers (1960) demonstrated that respondents recognized they went through a series of stages as they moved from awareness-knowledge to a decision to adopt, although often some stages in the series described above were skipped. Coleman, Katz and Menzel (1966) investigated the decision-process in physicians to prescribe new drugs. LaMar (1966) and Kohl (1966) explored the innovation-decision process in teachers and school superintendents, respectively. An important contribution from this model is the conceptualization of diffusion adoption as a process occurring over time and in stages.

The innovation diffusion in organizations is seen somewhat differently, incorporating collective innovation decisions, that is, where implementation involves a number of individuals joined in some meaningfully linked unit. Five stages in the innovation process in an organization include, (1) agenda setting, (2) matching, (3) redefining and restructuring, (4) clarifying, and (5) routinizing.

Agenda setting occurs when a general organizational problem creates a perceived need for an innovation. However, more often innovations in organizations are a solution looking for a problem. March (1981) found that “[Innovation] often seems to be driven less by problems than by solutions. Answers often precede questions” (p. 565). Wildemuth (1992) found that rational identification of organizational problems at the agenda-setting stage did not occur in a study of computer-related innovations among three large corporations.

Matching is defined as the stage at which a problem from the organization’s agenda is paired with an innovation. Redefining and restructuring describes the adaptation of the innovation into the organization’s structure. This process is also known as reinvention. Tyre and Orlikowski (1994) found that redefining an innovation occurs at the earliest stages of adoption into the organization. Clarifying occurs as the innovation is put to wide-spread use in the organization to the point of routinization, at which point the innovation is hardly recognized as such.

A large body of research exists as a result of studying the influence of technology on organizational and group decision-making. Communication researchers such as Rice (1987), Allen and Hauptman (1987), and Hiemstra (1986) have examined teleconferencing, computer conferencing, electronic mail and information systems. Research on computer models has demonstrated how the interests of individuals and groups involved with the technology shape the organizational decision-making (Dutton and Kraemer, 1985) and usage patterns (Rafaeli 1986).

Much attention in the diffusion literature is directed toward the particular innovation attributes and rates of adoption. Variables determining the rate of adoption of innovations among users include (1) relative advantage, (2) compatibility, (3) complexity, (4) trialability, and (5) observability. Moore and Benbasat (1991) developed a set of general scale items to measure each of the five main attributes of innovations. Kearns (1989) elicited perceived characteristics of eight innovations from computer consultants and city officials. The 25 attributes identified in Kearns' study are consistent with the five categories presented above as were the perceived attributes identified in Tornatzky and Klein's (1982) meta-analysis.

Relative advantage is the degree to which an innovation is perceived as being better than the idea it supersedes. Compatibility is the degree to which an innovation is perceived as consistent with the existing values, past experiences, and needs of potential adopters. Complexity is the degree to which an innovation is perceived as

relatively difficult to understand and use. Trialability is the degree to which an innovation may be experimented with on a limited basis. Observability is the degree to which the results of an innovation are visible to others (Rogers, 1995, p. 212-245).

From 49 to 87 percent of the variance in rate of adoption has been explained by these five attributes. Rate of adoption is the relative speed with which an innovation is adopted by members of a social system (Rogers, 1995, p. 206). Other variables include the type of innovation decision, the role of communication channels, the nature of the social system and the extent of the change agents' promotional efforts.

Network analysis is another key area in diffusion research. Communication network analysis identifies the communication structure and flows in a system by using interpersonal communication relationships as the units of analysis. For example, Allen (1970) and Brown and Utterback (1985) found unique communication patterns and roles in technical groups. Coleman (1966) studied the way in which interpersonal networks explained the nature of the diffusion process among physicians. A similar study of diffusion of computers among education administrators found interpersonal networks at the heart of diffusion (Kearns, 1992). These studies indicate that most diffusion networks are homophilous, which is, the degree to which a pair of individuals who communicate are similar, particularly in socio-economic standing (Lazarsfeld and Merton, 1964; Rogers, 1995). Heterophilous networks in diffusion are characterized by the presence of strong opinion leaders. Where opinion-leadership is

sought, the diffusion process is often accelerated by far-reaching influence compared to the limited circles of homophilous networks.

An important concept to come from network analysis is “critical mass,” occurring at the point at which enough individuals have adopted an innovation so that the innovation’s further rate of adoption becomes self-sustaining (Rogers, 1995, p. 313). Allen (1983) discusses the notion that individuals adopt an innovation in part on the basis of their expectations regarding others’ future adoption. This can also be explained using Bandura’s (1977) social learning theory.

The idea of critical mass means that the S-shaped curve of diffusion is sharper for interactive technologies than for non-interactive technologies. Interactivity is defined as the degree to which participants in a communication process can exchange roles in, and have control over, their mutual discourse (Williams, Rice and Rogers, 1988). An interactive technology is useless to the first person who adopts. This idea is more obvious in the case of the telephone, for example. As more individuals adopted the telephone the use of the medium grew. In the case of non-interactive media, the earlier adopters have a “sequential” interdependence effect on later adopters. As more and more users come on board, the innovation gains in value to later adopters (Rogers 1995, p. 315). Markus (1990) characterizes the “reciprocal” interdependence in interactive media as the increased benefit of adoption not only for all future adopters, but also for each previous adopter.

There is little empirical investigation available regarding the concept of critical mass in diffusion. Valente (1994) pioneered this area showing that network thresholds can be used to classify individuals according to (1) their innovativeness with respect to their system, and (2) their innovativeness with respect to their personal network partners. The power of peer influence and the key critical mass appear in the diffusion curve somewhere between the five and 20 percent level of adoption (Rogers, 1995, p. 324). The critical mass concept is evident in Homlov and Warneryd's (1990) study on the facsimile machine.

The most useful stream in diffusion research for this study is the framework of individual innovativeness and adopter categories. From this empirically-based framework comes the basis for partitioning the diffusion of cable television into five logical time periods. While the framework traditionally has been used to delineate time periods that are characteristic of consumer adoption behavior, the intimate relationship between the advertising industry and media audience growth is justification for borrowing the five periods as a measuring stick for time. That is, the advertising industry is expected to react, base its most basic decision-making, according to the development of a medium's audience.

The method of adopter categorization that has gained a dominant position among contemporary diffusion researchers is based on the S-shaped curve of adoption formed by plotting the cumulative number of adopters. The corresponding S-shaped

curve reflects the slow rise in adoption, which then accelerates to a maximum level until half the members of a system have adopted. Then the number of cumulative adopters increases at a decreasing rate. Recall that Figure 1 demonstrates such a distribution relationship for new cable television subscribers.

The adoption of an innovation also follows a normal, bell-shaped curve when plotting the number of *new* adopters across time (Rogers, 1995). A normal distribution is expected because of the cumulative pressure upon individuals to adopt as peer networks serve to spread adoption. This influence is consistent with the description of critical mass. The influence often results from increased rates of knowledge with the proximity of other adopters in the system. If one person tells two people about an innovation, they tell two people and the process continues like an unchecked infection, modeled by a binomial expansion (a mathematical function that follows a normal shape when plotted over a series of successive generations) (Goffman, 1977).

Because individuals in a system do not adopt an innovation at the same time, the adoption of an innovation should be viewed as a process occurring over time. This allows researchers to classify individuals on the basis of when they began using the innovation. Innovativeness, the degree to which an individual or other unit of adoption is earlier in adopting than other members of the same system, makes up the largest body of knowledge in the innovation stream (Rogers, 1995, p. 253).

Dozier and Rice (1984), cite Ruchinskas (1980) study of the characteristics of teletext users in the Los Angeles area where early adopters were younger, more interested in home telecommunications innovations, used other media more and liked television. Early adopters of computer technology have been investigated by Dickerson and Gentry (1983) Day, Barnett, Kim and Miller (1983) and Muller (1977). Early adopters have been found to be professional males with above-average earnings who are in search of new options and resources.

A useful characteristic of the normal frequency distribution is the ability to portion the adoption process by using the mean and standard deviations. Figure 2 shows the five adopter categories created for cable TV by counting off standard deviations from the mean against the normal curve distribution of new adopters. The usefulness of this simple categorization is outlined in Rogers (1986 and 1995). The area to the left of the mean adoption period minus two deviations includes the first 2.5 percent of the adopters, known as innovators. Psychographics associated with innovators describe the group as venturesome with a high interest in new ideas with an ability to understand and apply complex technical knowledge (Rogers, 1995). The next 13.5 percent to adopt the innovation fall between the mean minus one standard deviation and the mean minus two standard deviations. This category is labeled early adopters. Early adopters are more integrated into social systems than are innovators. Early adopters are seen as the person to check with before using a new idea. In order to

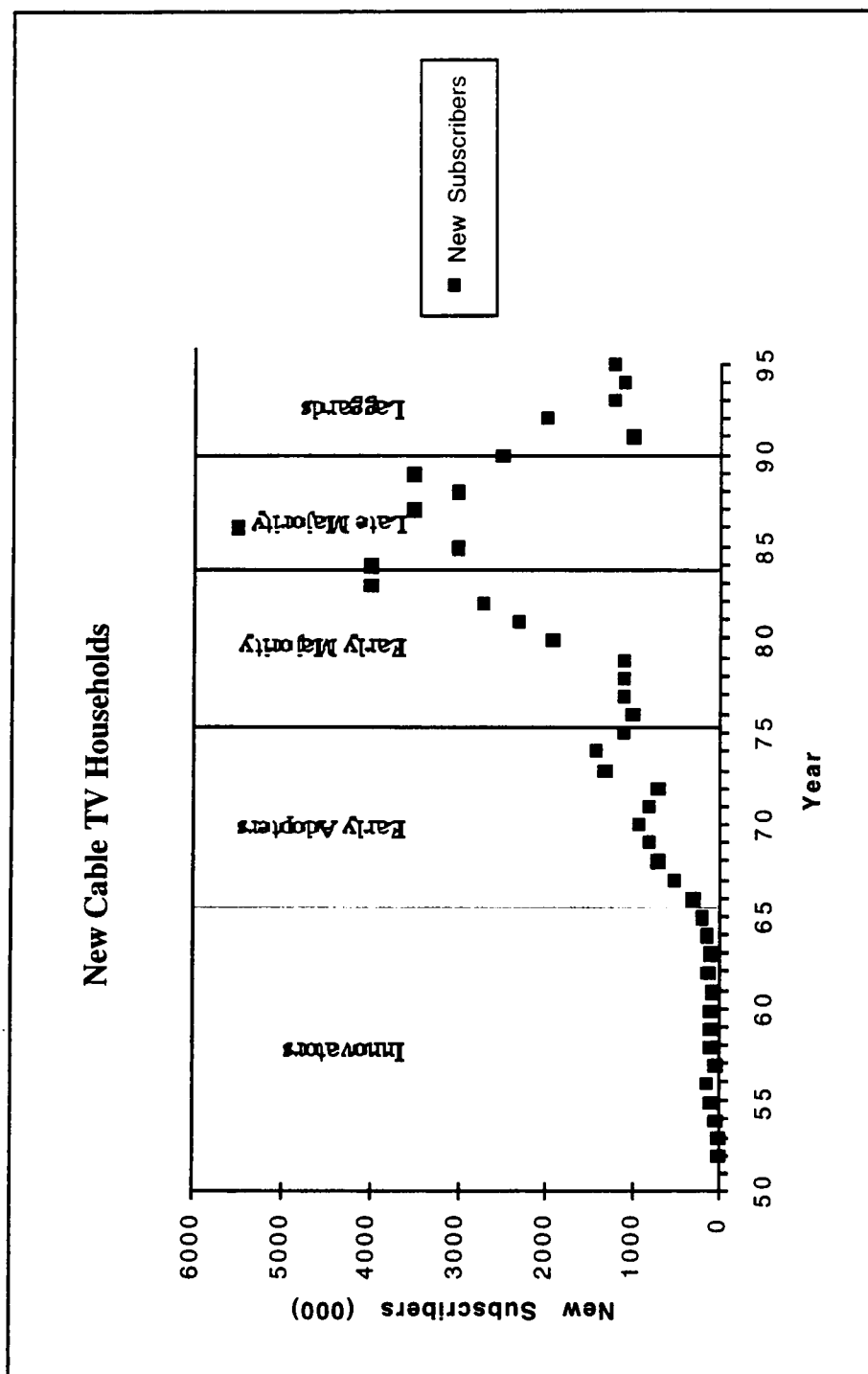


Figure 2
Cable TV New Subscribers Per Year
with Superimposed Adopter Category Time Periods

maintain the respect of their peers, early adopters must be judicious in their decision to adopt in order to maintain their status (Dickerson and Gentry, 1983).

The next 34 percent, early majority, spans the area between the mean date and the mean minus one standard deviation. This group adopts a new idea just before the average member of a system. The early majority interact frequently with peers, but are less likely to hold positions of opinion leadership in a system. Their actions are very deliberate.

Between the mean plus one standard deviation is the late majority category (34%). Adoption is often an economic necessity for the late majority. Innovations are approached with skepticism and caution. The pressure of peers is necessary to motivate the late majority to adopt.

Finally, beyond the mean plus one standard deviation we find the laggards, the final 16 percent of the population. Decisions are made in terms of historical evidence or tradition. Their resources are often limited and they must be sure that a new idea will not fail before they will adopt.

The lack of symmetry in the categorical dissection of the curve is defended by empirical evidence that suggests there are few distinguishing characteristics in the laggard category to warrant further division. The five adopter categories are exhaustive (except for nonadopters), mutually exclusive, and derived from one classification

principle; that is, innovativeness. Critical mass appears at the time period corresponding between 5 and 20 percent of adopters (Rogers, 1995).

Table 1 presents time segments for cable diffusion according to the mathematical segmentation discussed above. Innovators are those adopters during the period spanning the introduction of cable in 1949 to June 1995. Early adopters are found between July 1965 and February 1975. The early majority represent the next 34 percent of adopters from the period March 1975 to October 1983. The late majority are represented by the next 34 percent from November 1983 to December 1989. Finally, laggards are those adopters subscribing to cable services from 1990 to present.

Criticism of Diffusion Research Methodology. Rogers (1995) offers criticism of the diffusion of innovation paradigm pointing to the bias toward successfully diffused innovations, the methodological problem of recall as a means of measuring adoption, and an over-concentration on the individual as the unit of analysis. The bias toward successful innovations can be traced to its beginnings in agriculture. The first studies of hybrid corn were tied to the profitability of the use of the new seed. Also, much of the diffusion research is funded by “change agents” or those looking to facilitate adoption of an innovation. It is a matter of efficiency rather than basic research. Successful diffusion also leaves a convenient trail for investigators. The tendency to study those innovations that leave a trace translates into research that is more postdiction than prediction.

Table 1
Diffusion Adopter Categories and CATV Timeline

Category	%	Cume %	Subscribers (000)	Time Period
Innovators	2.5	2.5	1,412	1949 to June 1965
Early Adopters	13.5	16	9,040	July 1965 to Feb. 1975
Early Majority	34	50	28,250	March 1975 to Oct. 1983
Late Majority	34	84	47,460	Nov. 1983 to Dec. 1989
Laggards	16	100	56,500	Jan. 1990 to present

This is especially true for innovation research designed to examine the attributes of innovations and their influence on the rate of adoption. Rogers explains that the attributes of innovations are considered as independent variables in explaining variance in the dependent variable of rate of adoption of innovations. This dependent variable is measured in the recent past, and the independent variables are measured in the present. Therefore, it is difficult to use attributes as predictors of the rate of adoption. One possible solution is the extrapolation from the rate of adoption of past innovations into the future for other similar innovations (Rogers, 1995). The focus on the individual as the unit of analysis is attributed to the assumption that if the individual is the unit of response (i.e., the adoptee), he or she must be the unit of analysis (Coleman, 1958). Overcoming this criticism requires a creative effort to seek alternatives to using the individual as the focus of diffusion research.

The survey method and its reliance on recall data opens the door to several problems. Most studies begin at the conclusion of the diffusion process, asking respondents to remember details about their experience with innovation over time. The length of time, salience, memory and other individual differences make the data suspect from the start. These studies also tend to be one-time "snapshots" of the process at T₂. Rogers calls for "moving pictures," at a minimum T₁ and T₂, rather than the single observations of survey methods. Time is a critical dimension of the process in diffusion research:

Survey research on the diffusion process is a convenient methodology for the researcher, but it is intellectually destructive of the "process" aspect of the diffusion of innovations. (Rogers, 1995, p. 122).

Understanding social change processes becomes more accurate when the spread of a new idea is followed over time as it permeates the structure of a social system; this property of diffusion research gives "life to a behavioral change process" (Rogers 1995, p. 98). Rogers identifies more appropriate designs for studying the time dimension including, (1) field experiments, (2) longitudinal panel studies, (3) use of archival records, and (4) case studies. An ideal study then would investigate the diffusion of an innovation during its adoption process, encompassing as many cross-sectional observations as possible. Data also would be gathered at two or more points during the process, rather than after the diffusion is complete.

Summary of Diffusion Literature. The diffusion literature lends empirical evidence that a medium can be expected to follow an S-shaped curve with adopters categorized by the time period in which they become users. Interpersonal network influence and the concept of critical mass suggest that the environment in which this adoption process takes place shifts to some degree. Past diffusion studies suffer from the overreliance on recall data and the individual as the unit of analysis. An ideal study would take numerous observations, T_n during the diffusion process and would evaluate the impact of diffusion on some larger social unit (i.e., the ad industry). The

adopter categorization scheme is borrowed to impose logical time periods on the diffusion process of cable television. Since the advertising industry's view of a new medium would likely change as it moved from having little commercial value (i.e., small audience) to one of potential or great value (i.e., readily accessible audience of substantial size), the ebb and flow of frames may be expected to differentiate between the audience-based time categories.

Theoretic Formulation

Earlier discussion developed a frame as the emergence of themes and a "central organizing idea...for making sense of relevant events, suggesting what is at issue" (Gamson and Modigliani, 1991, p. 3). Research in frame analysis is called for that examines "the prominence of given news frames and how this ebbs and flows over time. (Gamson 1989, p. 160). The rhetoric of the electronic sublime has been demonstrated as a visible frame in new media studies, and the commercial culture surrounding the evolution of a new communication medium is the stage for evaluating a specific arena of new media.

Based on theoretical research streams in content analysis, specifically frame analysis, additional themes and frames emerging in the advertising industry's chief trade publication will be examined in detail.

The diffusion of innovations literature provides the independent variable of time categories for this study. In the diffusion tradition, the time categories are associated

with behavioral characteristics of adopters. The independent variable of time categories and its objective mathematical calculations using means and standard deviations are applied to set the framework for another kind of behavior, inextricably linked to the initial adoption behavior of the audience, which is the chief variable of interest in the advertising industry. Identifying dominant or shifting frames in the advertising trade press' coverage adds another dimension to the extant new-media diffusion studies. Shifts in frames also hold significant theoretic implications related to the diffusion of innovations literature. Capturing shifts in themes and frames would provide a motion-picture account of adiffusion process as called for by the field's leading researchers. The view of the advertising industry's role in the diffusion of new media is also an important contribution of this study.

From the current state of understanding of framing, futures rhetoric and diffusion of innovations come the research questions posed for this study: (1) Does futures rhetoric represent one of several themes emerging across time in the advertising press' coverage of cable TV? (2) Are time periods, specifically those defining the independent variables associated with diffusion adopter categories, characterized by distinct themes?

CHAPTER IV

METHODS

This section reviews the general analytic techniques employed in this study including content classification and interpretation, agglomerative hierarchical cluster analysis and multidimensional scaling (MDS). MDS is applied in the Concept Mapping and Frame Mapping methods and is based on the frequency of terms and their co-occurrence in text. This study uses the computer-aided content analysis software, VBPro and VBMap, developed specifically for analysis of verbatim text in natural language and for multidimensional scaling of concepts (Miller, 1994).

Content Classification and Interpretation

Holsti argues that content analysis has three principle functions: (1) to describe the characteristics of communication, asking what, how, and to whom something is said; (2) to make inferences as to the antecedents of communication, asking why something is said; and (3) to make inferences about the consequences of communication, asking with what effects something is said (Holsti, 1969). A frequently used definition of content analysis is taken from Stempel (1981, p.119) who describes it as a "formal system for doing something we do informally rather frequently, drawing conclusions from observations of content." Krippendorff (1980) argues that content analysis is an effort to make inferences from a symbolic medium.

Smith (1988) suggests that inferential studies seek to draw conclusions about the probable characteristics of sources, audiences, and contexts; inferring the likely effects of messages; and inferring the cultural norms and social behaviors that a message reflects. While some inferential functions can be accomplished using cross-sectional surveys (e.g., newspaper accounts of the Oklahoma City bombing to infer the events consequences), other descriptive and inferential tasks require longitudinal studies that analyze content over time to identify trends. Recall, however, that Gamson (1988) suggests that content analysis of audience impact is a methodological mine field: "Content analysis should be agnostic on the issue of how news is understood and recognize that this can only be learned by studying the audience" (p. 158).

Descriptive functions of content analysis include the identification of recurring thematic and structural patterns in messages, and the comparison of the content of messages. Another goal of content analysis is the discovery of some latent meaning of the communication that the sender and/or audience may not have been aware (Ogilvie, Stone and Shneidman, 1966). A breakthrough in this kind of analysis came with the development of computerized content-analysis by Stone (1966). The General Inquirer functioned as an objective coder, reading each word in a text and matching its contents according to instructions in a coding dictionary (Stone, Dunphy, Smith and Ogilvie (1966). The computer enabled several coding schemes to be used since the text could easily be reanalyzed, a feat often too laborious when done by hand.

Computer-aided content analysis often reveals aspects of text that might not otherwise be apparent. In Namenwirth's (1973) analysis of party platforms in presidential campaigns from 1844-1964, long and short cycles of changing thematic or value concerns were found. These findings were replicated in a study of British Speeches From the Throne from 1689-1972 (Weber 1978) A noteworthy component of these studies is the longitudinal span of more than 100 years (e.g., Namenwirth's study spans 300 years).

Weber (1978) cites Walker's (1974) earlier doctoral dissertation work that analyzed differences and similarities in American Black and White popular song lyrics from 1962 to 1973. He found that rhythm and blues and soul lyrics showed greater emphasis on action in the objective world and less concern with time. Changes in narrative focus also were detected. For example, identification with others increased significantly over time in soul and rhythm-and-blues lyrics, but not in popular "White" lyrics. Walker concluded that these changes reflect increasing self-awareness and positive images within the "Black" community.

Braam, Moed and van Raan (1991) combined analysis of co-citation relationships and word-frequency profiles to study time-dependent aspects of scientific literature. Different types of content-words were analyzed, including index terms, classification codes, and words from titles and abstracts of publications in the area of atomic and molecular physics. Results identified shifts in areas of interest and

approaches in the subject area over the ten-year period. Their work relied on the content (words) to identify the dynamics of the research:

Analysis of word-profile similarities...makes it possible to identify and link specialty literature not only within a given period, but also through time....word analysis provides an interesting possibility to improve interpretation of dynamic aspects of research in specialty literature delimited by co-citation analysis.

Aries (1973) used computer-aided content analysis to study differences in female, male and mixed-sex groups. She reported that differential sex-role socialization and sex-role stereotyping affect thematic content and social interaction. Klingemann, Mohler and Weber (1982) developed content-analytic instruments for the analysis of German language text using categories from the Lasswell Value Dictionary (1968) to examine the relationship between concern with wealth in speeches of the Kaiser and economic fluctuations between 1871 and 1912. Two specific concepts were hypothesized to exist in the text: wealth concerns and economic performance. The researchers had to overcome difficulty in measuring economic performance due to the dearth of economic data from the period; wheat and rye prices from the Berlin wholesale grain market served to guide their analysis.

Weber (1984) defended the content analysis of political documents and similar texts as examples of methodological collectivism where inferences are made about the dynamics of collective processes directly from the outputs of those processes:

First, documents such as party platforms, Kaiser speeches, and newspapers, already reflect a complex process of weighting according to power. Thus, comparing content indicators across sets of documents and/or over time may provide more accurate and realistic indicators of cultural and social processes. Second, if culture consists of shared understandings, and if those shared understandings are encoded in texts, then content analysis of documents yields direct measures of those shared understandings. These direct measures may be more valid and reliable than indicators based on averaging the private understanding of individuals (p. 313).

Summary of Content Classification and Interpretation. According to Berelson (1952, p. 18), "Content analysis is a research technique of objective, systematic, and quantitative description of manifest content of communication. Computer-aided content analysis is a particularly useful extension of content analysis in allowing the study of particularly large data sets in less time with highly reliable coding (Stempel, 1981).

The method of content classification is therefore applied in the analysis of published texts (i.e., trade press articles) as a means of understanding shifts and trends in an environment. This method is particularly useful in identifying characteristics in a social network or cultural subclass (i.e., the advertising industry) over many years that may go unnoticed using other methods.

Cluster Analysis

Researchers use cluster analysis "to create taxonomies, identify patterns of associations and distinguish subgroups in samples" (Rapkin and Luke, p. 298). The objective is to

partition a set of objects into homogeneous subgroups or into a hierarchical arrangement of homogeneous subgroups (Lorr 1983):

...these techniques are designed to:

- a. Identify natural clusters within a mixture of entities believed to represent several distinguishable populations;
- b. Construct a useful conceptual scheme for classifying entities;
- c. Generate hypotheses within a body of data by discovering unsuspected clusters;
- d. Test hypothesized classes believed present within a certain group of cases;
- e. Identify homogeneous subgroups characterized by attribute patterns useful for prediction (p. 3 - 4).

Press (1972, p. 408) describes clustering as "a collection of techniques that are used to group multidimensional entities according to criteria of their degrees of homogeneity and heterogeneity." Anderberg (1973, p. 10) describes cluster analysis as "an umbrella term for a loose collection of heuristic procedures and diverse elements of applied statistics." Anderberg posits that cluster analysis methods help sharpen the researcher's ability to recognize patterns and discovery; the methods "involve a mixture of imposing structure on data and revealing that structure which actually exists in the data."

Bernstein (1988, p. 345) describes clustering as "a generic term for procedures that group observations based on similarity." Jain and Dubes (1988, p. 1) define cluster

analysis as "the formal study of algorithms and methods for grouping, or classifying, objects." In their work, Algorithms for Clustering Data, the authors demonstrate how cluster analysis works to identify underlying structures in data. This structure can appear "as a grouping of individuals or as a hierarchy of groups" (Jain and Dubes, 1988, p. xiii).

Hierarchical cluster analysis addresses the arrangement of clusters in rank order of similarity and dissimilarity. Norusis (1990, B-157) describes the movement from smaller to bigger clusters as "agglomerative hierarchical clustering," where clusters are grouped—from individual cases—until all cases are linked in a single cluster. Rapkin and Luke (1993) describe the iterative process:

Agglomerative hierarchical algorithms start with all cases as separate entities and are subsequently combined (agglomerated) in sequence, so that those closest together are placed into the same cluster early in the hierarchy (Rapkin and Luke, p. 267). As the analysis proceeds, small clusters of cases combine to form continually larger and more heterogeneous clusters, until the clusters form one large cluster.

Lorr (1983) describes the components of cluster analysis:

The input...consists of a raw data matrix—that is, a rectangular array of numerical entries. The cell values may consist of nominal, ordinal, or interval measurements of the objects or the variables. The set of objects is represented in the N rows; the set of variables is represented in the n columns. The (i,j) th cell entry represents the value of an object i on variable j . The objects may be people, words...or concepts. The

variables are attributes or characteristics of the set of objects. The complete row of values is called the object's profile. The next step...is to transform the data matrix into a square $N \times N$ matrix of inter-object similarity or dissimilarity measures....The process begins with the computation of a distance or a similarity matrix between the $1/2N(N - 1)$ possible pairs of entities. Once the indices are available the matrix is searched for the closest (or most similar) pair i and j . Then i and j are merged to form cluster k and the matrix entry values are modified to reflect the change. The matrix is searched again for the closest pair and the two are merged into a new cluster. The process is followed until all entities are in one cluster.

Jain and Dubes (1988, p. 89) argue for the utility of the visual representation in hierarchical clustering techniques to "organize the data into a nested sequence of groups. An important characteristic of hierarchical clustering methods is the visual impact of the dendrogram, which enables the data analysis to see how objects are being merged into clusters or split into successive levels of proximity."

Anderberg (1973, p. 131) also describes the formation of the dendrogram's representation of groups as "moving down the tree from the branches toward the root depict[ing] increasing aggregation of the entities into clusters."

The resulting agglomeration schedule lists the number of clusters at each stage and the distance between the clusters (indicated as a coefficient), which is useful in determining how many clusters best represent the data (Norusis, 1990). The dendrogram is the visual representation of the cluster groups and plays a key role in analysis.

The dendrogram created by the SPSS statistical software package rescales actual distance to numbers between 0 and 25, which preserves the ratio of the distances between the steps. "Interpretation of the dendrogram generally proceeds from the clusters representing the closest similarity outward (which would correspond to groups of siblings on a family tree" (Riechert, 1996).

Optimally, clusters are "both compact and isolated, which means that it forms early in the dendrogram and is not absorbed into another cluster until late in the dendrogram" (Jain and Dubes, 1988, p. 196). Hartigan (1975) identifies a potential problem when a subset of the variables included in a cluster analysis are highly intercorrelated. When this happens, the correlated variables tend to obscure the contribution of other measures. To overcome this potential problem, several authors (Lorr, 1983; Skinner, 1979) suggest dimension reduction through principal components analysis of variables prior to cluster analysis. The procedure is described in the discussion of multidimensional scaling in the next section. This approach reduces the number of variables and orthogonalizing attributes under consideration (Rapkin and Luke 1993, p. 263). Ultimately, cluster analysis is a tool requiring interpretation by the researcher. Distinctive features of clusters are most useful for distinguishing and labeling them.

Rapkin and Luke (1993) set some guidelines for interpretation: "Clusters should always be distinguishable from one another in meaningful ways....Interpretability is the

foundation for all cluster analysis—if the obtained clusters do not make sense, it does no good to show how stable or distinct they are” (p. 270) Clusters are often submitted to further testing. It is possible to evaluate the significance of the differences between cluster means on a given measure using ANOVA post hoc tests (p. 271).

Multidimensional Scaling

The one-dimensional nature of the dendrogram can be supplemented by multi-dimensional representation of the data structure. MDS provides a descriptive tool, like those available in descriptive statistics, for the reduction of complex data (Beals, Krantz and Tversky, 1968). “Any data which can be interpreted as a similarity or a dissimilarity measure are appropriate for scaling analysis” (Coxon 1982, p. 3).

Beals, Krantz and Tversky (1968, p. 127) describe the goal of multidimensional scaling as recovering “the configuration of metric distances, and the coordinates of the stimuli, starting only with the ordering of their proximities or dissimilarities.” The idea was first explored by Coombs (1952).

Young and Hamer (1987) detail flexibility in MDS:

The term multidimensional scaling refers to a family of data analysis methods, all of which portray the data's structure in a spatial fashion easily assimilated by the relatively untrained human eye. That is, they construct a geometric representation of the data, usually in a Euclidean space of fairly low dimensionality. Some multidimensional scaling methods display the data structure in non-Euclidean spaces, and some methods provide additional information about how the structure varies over time, individuals, or experimental conditions. The essential

ingredient defining all multidimensional scaling methods is the spatial representation of data structure. (p. 3)

A complete introduction to MDS can be found in Schiffman, Reynolds and Young (1981). Principal components analysis serves to reduce the dimensionality of data so that it can be projected into three-dimensional space, as will be demonstrated in the analysis section of this study. In The User's Guide to Multidimensional Scaling, Coxon (1982) and Riechert (1996) describe the process. The first axis can be identified in the space using points that are at maximum distance from each other. This axis—demonstrating maximum variation—is extracted as the first principal component of the space.

A second axis is selected in such a manner that it explains remaining variation among the points orthogonally to the first axis of space. Therefore, the second axis is statistically unrelated to the first (with a correlation of zero between coordinates of points along the two axes). Additional principal components can be selected in the same manner, but consideration must be given to the readability of the resulting graph (or map). Likewise, each additional axis explains increasingly less variation in the data structure. Coxon (1982) describes the proportion of total variation explained by a specific principal component as its latent root, also referred to as the eigenvalue. The case is also made for three dimensions as sufficient to produce a multidimensional solution for the data structure.

The number of eigenvalues (or principal components) to be used in diagramming the results of MDS are certainly open to determination by the researcher. However, considering the premium placed on parsimonious representation in science, the number should be chosen based on its ability to depict the greatest amount of variation in the data structure with minimal complexity. Ansager and Miller (1994), Riechert and Miller (1995) and Riechert (1996) have demonstrated that three dimensions are sufficient and optimal for both capturing variation and creating readily interpretable diagrams as a result. Likewise, three eigenvalues will be used in the MDS applied in this study.

MDS and cluster analysis are used in complementary fashion in this study anticipating that multidimensional scaling "provides a spatial representation for the proximities, while clustering provides a tree representation for them (Riechert, 1996, p. 61, citing Kruskal, 1977). In addition, there is support for the notion that hierarchical clustering may be more sensitive to small dissimilarities, while MDS extracts information about large dissimilarities (Kruskal, p. 33). Coxon (1982, p. 116) supports the notion of using the two techniques in concert, citing how different techniques used on the same data set "often provide convergent evidence about both local and global aspects of the structure or configurations which, with a little imagination, can be invaluable in aiding interpretation."

Concept Mapping

Concept Mapping is a term that has been applied to a wide range of analytic processes, such as non-linear brainstorming (Rico, 1983), multidimensional note-taking (Buzan, 1984), and idea linkages (Novak and Gowin, 1984). Miller (1995a) defines concept mapping as a multidimensional scaling procedure developed for use in computer assisted analysis of natural language text (e.g., news releases, magazine articles). Concept mapping derives spatial representations from the co-occurrence of key terms and concepts by generating term frequencies and a cosine coefficient matrix based on the terms used (Riechert, 1996, p. 68):

The formula for the co-occurrence cosine coefficient matrix, with A and B representing the respective terms, according to Salton (1989), is:

$$\text{COS} = [\sum (AB)] / \text{sq. root of } [(\sum A^2)(\sum B^2)]$$

As described in the previous discussion of multidimensional scaling, the principal components of the co-occurrence cosine coefficient matrix can be extracted and mapped in multidimensional space. "Concepts appearing close to each other are related through co-occurrence and therefore, represent a cluster of related terms" (Riechert, p. 69).

This technique of identifying and comparing concepts and themes has been demonstrated in several studies, each using the VBPro family of software programs created by Miller (1995a, 1995b): Chew and Miller (1992), Chew, Mehta, and

Oldfather (1993, 1994), Miller (1994), Miller and Riechert (1994), and Miller and Andsager (1995).

Frame Mapping

Riechert (1996) uses a special application of Concept Mapping developed by Miller (1995a, 1995b) as Frame Mapping: "...the Frame Mapping Method allows the researcher not only to identify, examine, and compare predominant themes and frames in text, but it also allows for the comparison of these between and among different sources" (p. 73). Her study is the first doctoral dissertation using Miller's Concept Mapping and Frame Mapping procedures.

Frame Mapping is a computer-aided content analysis technique used to identify recurring and co-occurring keywords—and themes—in text. It is based on construction of a term-by-term similarity—or cosine coefficient matrix and extraction of the principal components for analysis of term co-occurrence data structure using MDS and cluster analysis (Riechert, 1996).

The calculations applied in Concept Mapping determine the patterns of terms in the original text, identifying which terms occur most frequently and together in text, making them the essence of, or representative of, the text from which they are extracted. Frame Mapping takes the analysis a step further using code source-identifier terms that are inserted into the text to identify the source (or time period, as in this study) prior to the computation of the term-by-term cosine coefficient matrix, principal

component extraction, derivation of multidimensional scaling (concept maps) and cluster analysis of the term co-occurrence similarities.

The result is that terms that locate closest to the time-code terms in the concept maps and that cluster with the code terms in the cluster analysis procedures will be the terms that represent the themes, and therefore, the issue frame, communicated during each time period.

This technique was used by Miller and Riechert (1994) in a study of articles related to pesticides in four magazines and by Riechert (1996) to identify frames in news releases from advocacy groups (e.g., Audubon Society) and their subsequent influence on coverage of wetlands issues.

Design of the Study

The present study employs Concept Mapping and Frame Mapping. The method will be described and illustrated in detail.

Analysis of Research Questions. Recall that the literature review section concluded with two exploratory research questions as the focus of this study: (1) Does futures rhetoric represent one of several themes emerging across time in the advertising press' coverage of cable TV? (2) Are time periods, specifically those defining the independent variables associated with diffusion adopter categories, characterized by distinct themes?

To answer these questions, articles related to cable television will be obtained from the advertising industry's principal trade publication, *Advertising Age*, from the first reference to cable television until April, 1995. Miller's Concept Mapping Method will be applied to determine themes represented during the diffusion process of cable television. Research question #1 proposes the presence of a frame of strong advocacy for the potential (or threat) of cable television consistent with that described in the previous discussion of technological determinism and Carey's rhetoric of the electronic sublime. It also suggests that this frame will appear with others as the advertising trade press reflects the negotiation of old and new practices during the cultural transition brought on by the evolution of cable television into a viable commercial medium. These frames also will be identified using Miller's Concept Mapping Method.

Research question #2 proposes that advertising industry trade-press coverage of cable television will emphasize different themes or frames corresponding to the time periods (independent variable) in the diffusion process. Comparisons will be made using the five adopter-category time periods derived from the Rogers (1995) model described in the review of the diffusion of innovations literature. Significant frames emerging from the investigation of the first research question will be visually displayed in a time-series analysis to aid in the interpretation of the ebb-and-flow of their presence in the publication. ✓

Next the frames will be subjected to analysis of variance (ANOVA) to determine the statistical significance of their prevalence and shifts among and between the five time periods. Post hoc tests will be applied as necessary to compensate for multiple comparisons of means inherent in this application of ANOVA.

Figure 3 shows a bar graph plotting the number of *Advertising Age* articles appearing during the five adopter time-period framework. *Advertising Age* has been selected because it is the leading industry source used by marketing communication professionals for information on industry news and emerging trends. It is also the only advertising trade publication spanning the entire adoption period of cable television. Rice (1984) demonstrated that the greatest density of coverage of new media is found in trade and business literature. Media and their personnel make up the largest category of *Advertising Age* subscribers, along with advertising agencies.

As the Standard Rate and Data Service description of *Advertising Age* indicates, the content is designed for this audience and its concerns:

The publication is edited to report on advertising, sales and marketing. Regular features include research, sales promotion, technology, consumer lineage [sic], brand information, [it] also contains special reports and projects (SRDS, 1995).

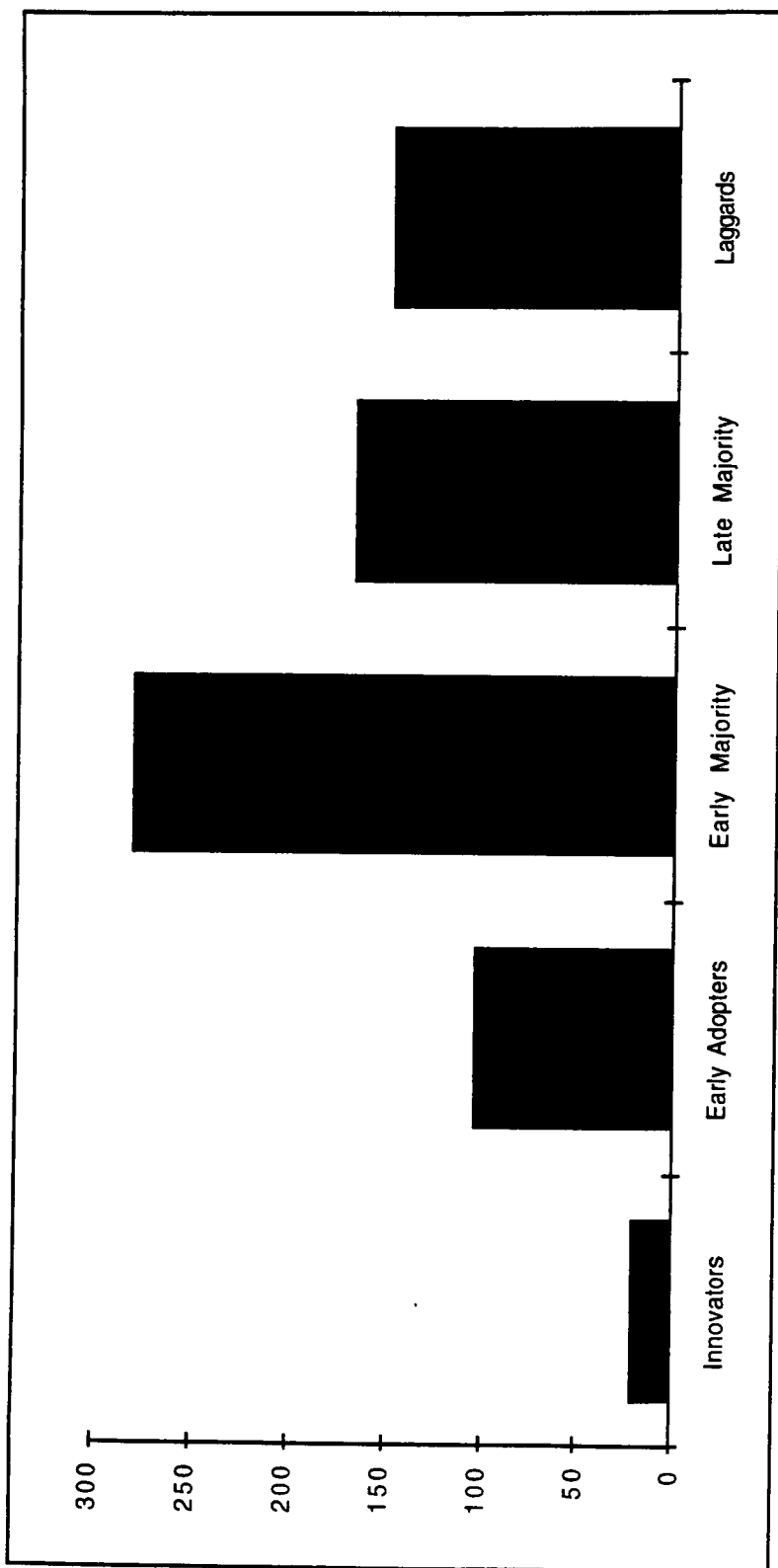


Figure 3
Frequency of Cable Television Articles in Advertising Age
by Adopter Time Category

CHAPTER V

ANALYSIS AND RESULTS

This section applies the analysis methods of Frame Mapping and Analysis of Variance (ANOVA) in addressing the research questions: (1) Does futures rhetoric represent one of several themes emerging across time in the advertising press' coverage of cable TV? (2) Are time periods, specifically those defining the independent variables associated with diffusion adopter categories, characterized by distinct themes?

The basis of these procedures was described in the previous section. Co-occurrence patterns among key terms are identified in Concept Mapping through construction of a term-by-term similarity cosine coefficient matrix and extraction of principal components. Values of the extracted coordinates then are submitted to agglomerative hierarchical cluster analysis, which produces visual representations—in the form of dendrograms and concept maps. This visualization permits inspection of the relationships among frames.

Multidimensional maps also are drawn using the extracted coordinates to produce a complementary visual depiction of the term co-occurrence data structure, that is, frames that occur in proximity in the text will be identified on the concept map. Frame Mapping operates in a similar manner and uses inserted code-identifier terms so that the relative location of the source codes can be used to reveal, in cluster analysis

dendrograms and concept maps, which frames occur with the code terms and therefore can be taken to demonstrate the issue frames prominent in the respective adopter time periods.

Finally, mean occurrences of the most prominent frames revealed in the Frame Mapping procedures will be subject to one-way analysis of variance to confirm the statistical significance of their prominence among adopter-time period groups.

Figure 4 outlines the five stages in the Mapping Methods adopted from Riechert (1996): (1) planning, (2) obtaining and preparing data, (3) analysis, (4) generation of dendrograms and maps, and (5) interpretation. The diagram is an oversimplification because in practice an iterative process is involved. This iterative process includes analysis, generation of dendrograms and maps, and interpretation.

The first portion of this section will describe the Concept Mapping procedures used to identify themes or frames occurring in the *Advertising Age* articles during the diffusion of cable television (research questions 1 and 2). The second portion will use the findings (identified themes and frames) of Concept Mapping analysis as the basis for investigating the prominence of certain frames within and between different time periods as described by the diffusion of innovations tradition (research question 2).

This study extends the operational definition of a frame used in Riechert (1996, p. 82) as "the manifest presence of frequent, co-occurring, and substantive terms

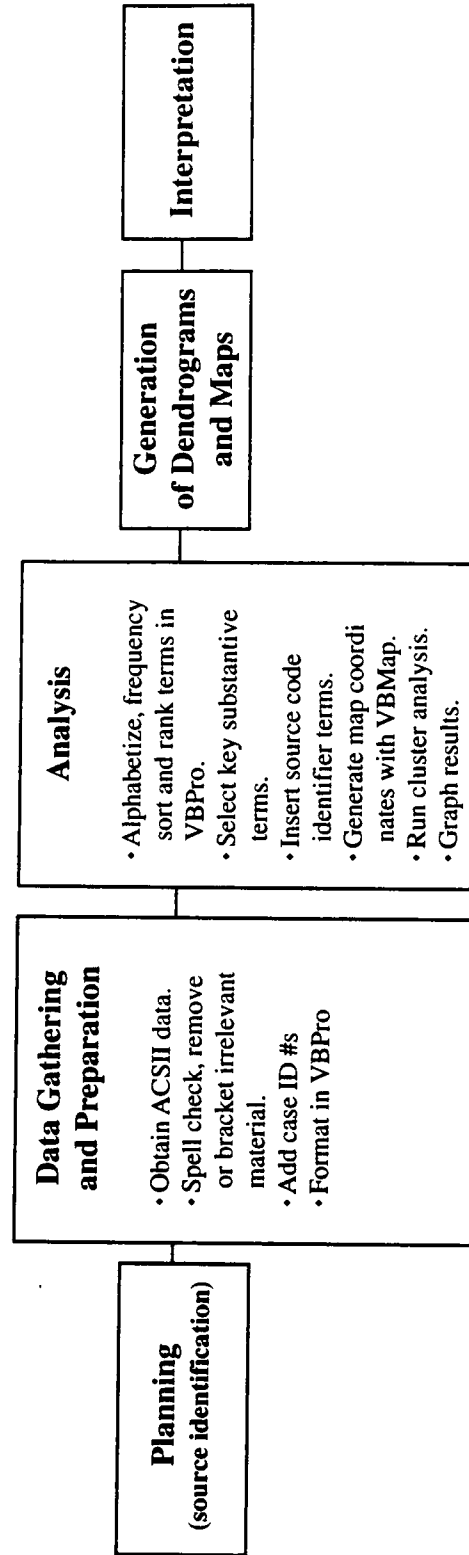


Figure 4. Five Stages of Frame Mapping Method, An Application of Concept Mapping Modified from Riechert (1996).

forming one or more themes in natural language text originating from a distinctive source" or distinctive time period. The terms together "are interpreted to represent a particular source's definition or frame of an issue" (p. 82) or frame peculiar to a meaningful time period related to the issue. A time period's frame will be identified using substantive terms and concepts that are emphasized most frequently, and together, to form key themes. A prominent frame among adopter time periods will occur with significantly greater average frequency, that is, greater than would be expected by chance ($p = <.05$). This application of frame draws specifically from Entman's (1993, p. 53, 57) use of frames as "manifested by the presence of certain keywords" and appearing as "clusters of messages."

Concept Mapping Step One: Planning

The first step in the process is identifying a plan for a study that matches the issue of interest with a sufficient data source. Cable television is selected as the focal point of this study given (1) its one-time status as a new medium of great interest to advertisers, (2) its recent maturation as a medium, evidenced by the S-shaped adoption curve in Figure 1, and (3) the availability of advertising industry trade publication articles found in Advertising Age. Thus, there is an issue of interest to a particular industry matched with a sufficient data source.

Step Two: Obtaining and Preparing Data

Procedures used in this study enable the researcher to analyze enormous amounts of data in the form of ASCII text files, which can be obtained in several ways. Flat-bed scanners and optical character reading software can be employed to create digital files from text. However, the process is still wrought with problems and depends greatly on the quality of the original source. Since the *Advertising Age* articles were taken from as early as 1960, microfilm and aged paper originals resulted in unacceptable error rates in translation.

This problem was resolved by manually keyboarding articles from microfilm originals (from 1960 to 1986) and downloading articles already in digital format (word processing) from an online database service (1986 to 1995). The articles were selected based on their inclusion in J.W. Wiley and Sons, Business Periodicals Index under appropriate subject headings for cable television. Particular attention was given to the changes in reference terminology related to the development of cable television. The key index words used were (1) community antenna television, (2) television, community antenna, and (3) cable television.

Articles from 1960 (the earliest reference to cable television by any term in the Business Periodical Index and also appearing in *Advertising Age*) to 1986 were located in the microfilm archives at Boston University's Mugar Library. Some 511 articles were reviewed for their appropriateness for inclusion in the study; the criterion used for

inclusion was that the primary focus of the article be cable television. Fewer than 10 articles were removed, each being purely statistical information such as ratings reports for popular television programs or the annual reports of the nation's top 50 multiple system operators (MSOs). A final group of 502 articles were used from the index covering 1960 to 1985, inclusive.

Photocopies were made from microfilm articles appearing prior to 1986 and then keyboarded into digital format using the word processing program Microsoft Word. In 1986, *Advertising Age* articles were made available in full text format via the Lexis/Nexis online database, making electronic retrieval a more time-efficient alternative.

Articles from 1986 were identified first using the ABInform CD-ROM database using the search terms cable tv, CATV, cable television and Advertising Age. More than 345 articles were selected using this process. Each article was downloaded using the Lexis/Nexis connection provided by Boston University and then evaluated for its appropriateness for inclusion in the study. Again, the criterion used for inclusion was that the primary focus of the article be cable television. Appendix C provides 10 randomly selected examples of the 95 articles rejected during this evaluation process; 216 articles were retained and included in the study.

The full text was saved as ASCII text and translated into Microsoft Word in order to remove Lexis/Nexis headers and formatting marks included in the online

downloading process. The articles were then combined with the articles typed from the microfilm copies. The final data set includes 718 articles. A master copy of the articles was printed on more than 1200 single-spaced pages. The master copy was saved on a single 100 megabyte Zip diskette and placed in storage for security and preservation. Back-up copies were used for all data analysis.

From the back-up copy of the data set, the articles were evaluated once again for typographical errors and extraneous formatting marks. A distinct case identification number was inserted at the beginning of each article (or case) using the pound symbol (#) to signify the beginning of the case identification number as required prior to analysis in VBPro. The case identification system employed a combination of the publication volume number, first page number for the article, and the date of publication. Finally, the text file was saved as a generic text file in the VBPro directory on an IBM-compatible Personal Computer (Compaq 1100) provided by Boston University's Communication Research Center.

The articles used for analysis are listed individually in Appendix A by case number, volume number, page number, date and title.

The VBPro program was initialized on the computer and the formatting portion of the application was selected to prepare the file according to the requisite format used in VBPro analysis. The formatting procedure isolates individual sentences in each case, each sentence beginning on a new line; it also analyzes abbreviations and capitalization

to allow the researcher later to code and retrieve by case, paragraph, sentence, or key word. The formatting procedure took approximately 35 minutes to complete. The formatted file is then saved to the VBPro directory with the extension .FRM added to the original file name. The procedures for the steps described in the study are described in detail in the User's Guide for VBPro: A Program for Analyzing Verbatim Text (Miller, 1995a).

Step Three: Analysis

Alphabetizing Terms with VBPro. The next step addresses the identification of key terms and their frequency of appearance in the articles. The formatted file is submitted to the alphabetizing procedure that lists all terms in the text file in alphabetical order, along with the frequency of occurrence in the entire data set. This process took 15 minutes. The alphabetized file is automatically assigned the extension .ALF by the VBPro program and saved in the VBPro directory. The alphabetized file can be viewed using any standard word processing program.

Frequency Scoring Terms with VBPro. Next, the VBPro frequency ranking procedure produced a list of all terms according to frequency of occurrence. The ranking procedure took less than 10 minutes; the output file is automatically assigned the extension .FRQ and saved in the VBPro directory. The ranking file of terms was originally 411 pages long. However, it was reduced to 78 pages by converting the

document to a four-column-per-page format displayed in 8-point type. This layout conversion was done using Aldus PageMaker 5.0 on a Power Macintosh 9500.

The report includes the number of occurrences and the relative frequency of each term, in whole numbers and up to three decimal places. In this analysis, the .FRQ file reported "22,413 types and 589,947 tokens," meaning the number of different terms and total terms in the file, respectively. These terms occurred in frequencies ranging from 1 to 30,969 in the articles. The term "the" occurred with the greatest frequency; some 9,392 terms appeared only once. Table 2 presents excerpts from the frequency ranking file, which includes the number of occurrences and relative frequencies for each term.

The frequency rank file was printed and inspected for substantive terms used most frequently and considered most interpretable. As discussed in an earlier section, the Concept Mapping and Frame Mapping methods are based on mathematical analysis of term co-occurrence. The methods allow the researcher to identify those terms that best represent issue frames from a starting point of high-frequency terms that encompass the entire issue. Some of the most frequently occurring substantive terms include "programming" 1,764 (times); "advertisers," 1,098; "subscribers," 887; "FCC," 747; and "audience," 552.

Selecting Substantive Terms in VBPro and Creating a Search File in VBPro.

VBPro allows up to 125 terms to be used in the analysis. Terms are selected on the

Table 2
Frequency Ranking File Output from VBPro Analysis

Term	Frequency	Relative Frequency
THE	30,969	5.249
TO	17,584	2.981
OF	15,031	2.548
AND	13,540	2.295
A	12,429	2.107
IN	10,316	1.749
.		
.		
.		
RESEARCH	385	0.065
VERY	382	0.065
.		
.		
HOUSEHOLDS	263	0.045
AGENCIES	261	0.044
.		
.		
DEREGULATION	66	0.011
.		
.		
ZOTTI	1	0.000
ZUCCHI	1	0.000
ZWEI	1	0.000

basis of their (1) frequency of occurrence and (2) meaningfulness or interpretability.

Terms can also be included based on particular interest by the researcher related to expected issues in the data.

Based on their frequency of occurrence, meaningfulness and interpretability for the study, the original list of 22,413 was reduced to 86 terms that were selected for concept mapping and frame analysis procedures. Recall that more than 9,390 terms appeared only one time. Still more terms appeared only two or three times; these terms consisted of proper nouns, personal pronouns, and similar nonsubstantive words. Their exclusion from the balance of the analysis served to improve the quality of the clusters that would emerge from hierarchical cluster analysis.

Grammar-related terms such as "the," "to," "of," "and," "a," "in," and "for," despite their high frequency of occurrence, were not selected for analysis because of their lack of substantive meaning. Non-grammatical terms that occurred with great frequency in the articles, but also were deemed to lack substantive content, included terms such as "said," 2,833 (times); "new," 2,497; "pay," 1,751; "one," 1,408; "up," 1,303; "local," 1,177; "year," 1,100; and "other," 1,088.

As noted above, the selection of words from the frequency report for further analysis can include subjective judgment by the researcher. For example, in this study the words "cable" and "television" were removed given that all articles initially identified for inclusion in the study were done so based on their previous inclusion in a

"cable television" index. Their absence from the subsequent analysis is deemed inconsequential. The intent of this study is to identify the frames surrounding cable television, not the pre-determined frame of cable television itself.

The selection and exclusion of terms for the search file were performed only after careful examination of all articles in the study. The results of the frequency rank output were then examined. This enabled the researcher to anticipate some probable key terms based on contextual understanding. For example, terms such as "controversy," "expectation," "future," and "optimism" were included in the search file based on their high frequency and logical connection as key words in the rhetoric of the electronic sublime. Also, the key terms "FCC," "regulation," and "congress" were included based on their high frequency of occurrence and logical connection to regulatory issues.

A basic search file was created in a word processing program listing the 86 selected terms, according to the guidelines in the User's Guide for VBPro (Miller, 1995b). To consolidate terms into the most concise and substantively meaningful search file possible, terms deriving from the same root meanings were combined under a single search term. For example, the words "subscriber," "subscriber's," "subscribers," and "subscribers'," containing the same substantive meaning, differing only on the plural or possessive use of the term. All four terms were combined under the single search term, "subscribers." This is an application of the more abstract sense of the term "word," known as a *lexeme* (see Lyons, 1975, p. 197).

Despite the frequent combinations of terms with the same root (lexemes), care was taken not to impose combinations that might threaten the possible emergence of unexpected relationships. A notable example is the decision to leave the terms "agency" and "agencies" as distinct to allow for the possibility that the use of the terms may vary enough to result in any number of possible clusters. The terms "agency" and "agencies" may be used in relationship to federal and state regulatory institutions *and* advertising companies. The terms were not combined to permit the cluster analysis method to determine whether or not these terms co-occurred with other possible key terms.

This procedure was used in every possible case to include all occurrences of the terms with the same substantive meaning. Table 3 reveals the main search file terms and the derivative terms collapsed under the respective headings. The search file is assigned to the .FRM extension, according to VBPro requirements, and saved in the VBPro directory.

The selected terms were submitted to analysis through the principal components method to produce cluster analysis tree diagrams (or dendrograms) and multidimensional scaling configurations, or concept maps, to reveal those terms that occur together in the cable television articles. This process constitutes the Concept Mapping procedure to identify major themes among the entire set of articles. Major themes, defined as those clusters whose terms were joined to others at the first or second distance from the origin, will be plotted on a time-series graph to provide

Table 3
86 Selected Frequently Occurring Substantive Terms

Key Term	Component Terms
(1) acquisition	acquisition acquisitions acquisition's acquisitions' acquire acquired acquiring
(2) advertising	advertising ads advertisement advertisements advertisement's commercials ads' advertisements' commercials' commercial's ad's ad advertise advertised advertiser advertiser's advertisers advertisers' advertising advertising's
(3) agencies	agencies agencies'
(4) agency	agency agency's
(5) alliances	alliances alliance alliance's alliances'
(6) analysis	analysis analyze analyses
(7) audience	audience audience's

Table 3 (Continued)

Key Term	Component Terms
	audiences audiences'
(8) budget	budget budget's budgets'
(9) capital	
(10) commission	commission commissions commission's commissions'
(11) competition	competition compete competes competing competed competition's competitions competitions' competitive competitor competitor's competitors competitors'
(12) congress	congress congress' congressional
(13) controversy	controversy controversies controversial
(14) copyright	copyright copyrights copyrighted copyright's copyrights'
(15) cost	cost costs cost's costs'

Table 3 (Continued)

Key Term	Component Terms
(16) court	court courts court's courts'
(17) cpm	cpm cpms' cpms cpm's
(18) demographic	demographic demographics demographic's demographics' demographically
(19) deregulation	deregulation deregulatory
(20) development	development develop develops developments development's developments'
(21) efficiency	efficiency efficient
(22) expansion	expansion expansions expansive expanded expand
(23) expectation	expectation expectations expectation's expectations' expect
(24) fail	fail failure failures failure's failures'

Table 3 (Continued)

Key Term	Component Terms
(25) fairness	fairness fair fairer
(26) FCC	FCC FCC's FCCs
(27) federal	federal federally
(28) financing	financing finance financial
(29) format	format formats formatting format's formats'
(30) franchising	franchising franchise franchises franchisee franchiser franchisee's franchiser's franchisers' franchisees' franchise's franchises'
(31) future	future futures future's futures'
(32) government	government government's
(33) growth	growth growing grow grown
(34) hardware	hardware

Table 3 (Continued)

Key Term	Component Terms
(35) home	home homes home's homes'
(36) household	household households households' household's householder householder's householders' householders
(37) infomercials	infomercials informercial informercial informercials informercial's informercial's infomercials' infomercials'
(38) investment	investment investments investment's investments' investors investor investor's investors'
(39) legislation	legislation legislations legislations' legislation's legislate legislated legislates legislating
(40) licensing	licensing licenses licensee licenses' license's

Table 3 (Continued)

Key Term	Component Terms
	licensee's licensees'
(41) losses	losses loss
(42) marketing	marketing market markets markets' marketer marketer's marketers' marketing's marketable
(43) measurement	measurement measurements measurement's measurements'
(44) merger	merger mergers mergers' merger's merging merging's mergings' mergings
(45) monopoly	monopoly monopolies monopoly's monopolize monopolizes monopolizing monopolists monopolists' monopolist's
(46) movie	movie movies movie's movies'
(47) msn	msn

Table 3 (Continued)

Key Term	Component Terms
(48) nielsen	nielsen nielsen's nielsens
(49) offering	offering offering's offerings offerings'
(50) operator	operator operators operator's operators' mso mso's msos msos'
(51) opportunities	opportunities opportunity
(52) optimism	optimism optimistic optimistically
(53) origination	origination originate originated originating originates original originally
(54) ownership	ownership owners own owner owner's owners' owns owned
(55) partnerships	partnerships partnership partners partnership's partnerships'

Table 3 (Continued)

Key Term	Component Terms
	partner's partners' partner
(56) penetration	penetration penetrate penetrated penetrates
(57) pessimism	pessimism pessimistic pessimistically
(58) possibilities	possibilities possibility possibilities' possibility's
(59) potential	potential potentially potentials
(60) ppv	ppv ppv's
(61) pricing	pricing price prices price's prices'
(62) producer	producer producers producer's producers' produce producing production produced
(63) profit	profit profits profit's profits' profitable
(64) programming	programming

Table 3 (Continued)

Key Term	Component Terms
	program programing programs program's programs' programmed programed programmer programmer programmers programmers' programmer's programers programers' programer's
(65) projections	projections projection's projection projecting
(66) prospects	prospects prospect prospect's prospects'
(67) protection	protection protect protects
(68) rate	rate rates rate's rates'
(69) ratings	ratings rated rating ratings' rating's
(70) regulations	regulations regulate regulates regulation regulations' regulation's

Table 3 (Continued)

Key Term	Component Terms
	regulatory regulator regulative
(71) research	research researches research's researchers researcher researcher's researchers'
(72) restrictions	restrictions restriction restriction's restrictions' restricting
(73) rules	rules rule rule's rules' ruling rulings ruling's rulings'
(74) services	services service's service services'
(75) sponsors	sponsors sponsor sponsor's sponsors' sponsorship
(76) standards	standards
(77) state	state state's states'
(78) subscribe	subscribe subscribes subscribing

Table 3 (Continued)

Key Term	Component Terms
	subscribed subscriber subscribers subscribers' subscriber's subscription subscriptions subscription's subscriptions'
(79) surveys	surveys survey survey's surveys' surveying surveyed
(80) syndication	syndication syndicated syndicating syndications syndication's syndications' syndicators syndicators' syndicator's syndicator syndicates syndicate's syndicates'
(81) technology	technology technologies
(82) testing	testing tests test test's tests'
(83) threat	threat threaten threatens threatening threats
(84) vehicles	vehicles

Table 3 (Continued)

Key Term	Component Terms
	vehicle
(85) venture	venture ventures venture's ventures'
(86) viewer	viewer viewers viewer's viewers' viewership viewing

additional visual clues to the ebb-and-flow of frame prominence across time. The next section details this process.

Creating A Numeric Coded File in VBPro. The coded output file in VBPro is a numeric data file that includes one row for each case's identification number (718 articles or 718 cases) and one column for each variable, that is, the frequency of occurrences for each of the 86 terms specified in the search file. The resulting numeric data file creates a 718 by 86 matrix. For example, the data matrix for a single case may resemble the one below:

```
#39:52|7/16/64|, 9, 3, 4, 6, 0, 0, 8, 2, 0, 23, 0, 0, 3, 11, 15, 0, 11, 0,  
2, 0, 0, 9, 14, 9, 0, 5, 7, 2, 0, 3, 0, 0, 8, 9, 3, 4, 6, 0, 0, 8, 2, 0, 23,  
0, 0, 3, 4, 15, 14, 1, 0, 2, 0, 0, 9, 14, 9, 0, 5, 7, 2, 8, 3, 0, 0, 9, 9, 3,  
4, 6, 0, 0, 0, 7, 0, 2, 0, 6, 3, 0, 15, 1, 11, 0, 2, 0, 0
```

In this case, the case identification number is #39:52|7/16/64|; the first search term appeared nine times, the second appeared three times, the third appeared four times, and so on for each of the 86 terms and all 718 cases.

Extracting Term Vectors with VBMap. The coded numeric data file was then submitted to the VBMap program for multidimensional scaling. VBMap asks for the number of dimensions desired; in this analysis three dimensions were requested. As discussed earlier, three dimensions allows for detailed visual representation of the data set while maintaining parsimonious explanatory power of the data. That is, more dimensions would be difficult to visualize in any interpretable way and the expected

gain in variance accounted for would be minimal. This and other VBMap procedures are described in detail in the User's Guide for VBMap: A Program for Multidimensional Scaling of Concepts (Miller, 1995b).

Two output files are produced by VBMap, one being the term coordinates file with the assigned .MAP extension, and the other being a report file with the automatically assigned extension .UNS. Both files report the same data but differ in their presentation format. The term coordinates file includes a list of eigenvectors for the specified terms, identifying the points in multidimensional space that correspond to the co-occurrence relationship of the terms. These coordinate values are displayed in Table 4.

Term coordinate values range from -1.0 to 1.0. From the term coordinate file for this data set, we see that the range for the first coordinate (first dimension) spans from .55 for "FCC" to -.50 for "research," demonstrating a relative dissimilarity, or infrequency of co-occurrence between these terms. On the same first dimension, the terms "commission" (.50), "congress" (.52) and "rules" (.46) have similar first coordinates demonstrating similarity or frequency of co-occurrence. Note that the three dimensions specified in the mapping procedure account for 43, 30, and 27 percent of variance, respectively, for a total of 100 percent.

Additional use of the coordinate values (principal components) will be shown in a later portion of this section when all three are used to plot the multidimensional

Table 4
Map Coordinates for 86 Selected Substantive Key Terms

TERM	Coordinate 1	Coordinate 2	Coordinate 3
acquisition	-0.03	0.18	-0.25
advertising	-0.29	0.28	0.17
agencies	-0.38	0.03	0.35
agency	-0.30	0.13	0.31
alliances	-0.03	0.02	-0.13
analysis	-0.28	-0.15	0.28
audience	-0.36	0.10	0.33
budget	-0.19	0.01	-0.02
capital	-0.02	0.17	-0.28
commission	0.50	0.21	0.32
competition	0.10	0.32	-0.04
congress	0.52	0.18	0.36
controversy	0.14	0.08	0.04
copyright	0.35	0.13	0.27
cost	-0.33	0.18	0.10
court	0.35	0.01	0.23
cpm	-0.32	-0.12	0.31
demographic	-0.37	-0.08	0.23
deregulation	0.18	0.08	-0.05
development	-0.17	0.22	0.18
efficiency	-0.24	0.05	0.27
expansion	-0.12	0.16	0.16
expectation	-0.12	0.32	-0.03
fail	-0.04	0.10	-0.13
fairness	0.13	0.02	0.11
FCC	0.55	0.28	0.35
federal	0.39	0.13	0.15
financing	-0.05	0.26	-0.19
format	-0.17	0.11	-0.11
franchising	0.05	0.20	-0.21

Table 4 (continued)

TERM	Coordinate 1	Coordinate 2	Coordinate 3
future	-0.06	0.38	0.13
government	0.30	0.12	0.06
growth	-0.24	0.15	0.12
hardware	-0.11	0.16	-0.11
home	-0.18	0.28	-0.14
household	-0.41	-0.04	0.12
infomercials	-0.10	0.00	-0.06
investment	-0.05	0.22	-0.14
legislation	0.42	0.09	0.19
licensing	0.17	0.05	0.01
losses	-0.07	0.16	-0.09
marketing	-0.20	0.34	0.00
measurement	-0.27	-0.13	0.22
merger	0.02	0.10	-0.13
monopoly	0.09	0.02	-0.01
movie	-0.04	0.20	-0.16
msn	-0.07	-0.07	-0.01
nielsen	-0.34	-0.16	0.22
offering	-0.10	0.34	-0.19
operator	-0.03	0.39	-0.26
opportunities	-0.29	0.09	0.23
optimism	-0.11	0.08	0.04
origination	0.02	0.34	0.11
ownership	0.11	0.39	-0.06
partnerships	-0.12	0.16	-0.35
penetration	-0.20	0.11	0.00
pessimism	0.10	0.27	0.17
possibilities	0.10	0.32	0.16
potential	-0.08	0.39	0.01
ppv	-0.07	0.06	-0.15

Table 4 (continued)

TERM	Coordinate 1	Coordinate 2	Coordinate 3
pricing	-0.17	0.19	-0.13
producer	-0.16	0.15	-0.13
profit	-0.12	0.33	-0.13
programming	-0.12	0.36	0.08
projections	-0.13	0.09	-0.10
prospects	-0.00	0.15	0.03
protection	0.39	0.14	0.27
rate	-0.05	0.25	-0.24
ratings	-0.31	-0.11	0.17
regulations	0.43	0.25	0.25
research	-0.50	-0.08	0.40
restrictions	0.39	0.18	0.21
rules	0.46	0.19	0.28
services	-0.04	0.43	-0.12
sponsors	-0.18	0.12	-0.06
standards	-0.01	-0.00	0.02
state	0.17	0.07	0.01
subscribe	-0.11	0.39	-0.18
surveys	-0.28	-0.06	0.15
syndication	-0.01	0.09	-0.07
technology	-0.19	0.11	0.05
testing	-0.09	0.08	0.02
threat	0.06	0.12	-0.07
vehicles	-0.26	0.08	0.15
venture	-0.11	0.27	-0.35
viewer	-0.30	0.16	0.20

configuration of the frames. In addition, the insertion of code-identifier terms will demonstrate validity of this scaling procedure.

The data files created by the mapping procedures can be submitted into statistical analysis programs, such as SPSS used in this study, for further analysis. SPSS analyzed the ASCII report file (described earlier with the extension .UNS). The report contains 86 rows, corresponding to each search term and four columns, corresponding to the term and three coordinate values extracted for each dimension.

In SPSS four variables were defined: term (string, width 18), and C1, C2 and C3 (numeric) for Coordinates 1, 2, and 3, respectively and hierarchical cluster analysis was specified. In addition, the dendrogram plot and cosine method were selected. For a discussion of the cosine pattern similarity measure, please see Norusis (1994), Salton and McGill (1983) and Salton (1963); also referenced in Riechert (1996).

Step Four: Generating Dendrograms and Maps in VBPro

The procedures described above produce a hierarchical cluster-analysis dendrogram, or tree-diagram, as a visual representation of the co-occurrence for the terms in cable television articles in *Advertising Age*. Dendrograms, as addressed previously, are a visual trail for the steps in the hierarchical clustering solution (Norusis, 1994, p. 91). Interpreting the dendrogram requires knowledge of the agglomerative method of hierarchical cluster analysis used in this study. Initially each term is considered a single cluster. In each subsequent stage of analysis, clusters are

joined to larger clusters based on similarity until all the clusters (or terms) are viewed as a single cluster.

Criteria are selected under which the clusters are joined. Norusis (1994) describes combinations based on either a matrix of distances or similarities between pairs of cases. Several cluster methods are available, such as average linkage between groups method (unweighted pair-group method using arithmetic averages), within-groups linkage, and Ward's method. This study applied the SPSS default method of between-groups linkage based on wide acceptance in cluster analysis literature (Norusis, 1994). Likewise, there are several methods available to measuring the similarities/dissimilarities matrix upon which the cluster analysis is based. As discussed earlier, the cosine of vectors of variables is used in this study.

The dendrogram produced by SPSS rescales the actual distances to numbers between 0 and 25, so that the actual distance between steps in the clustering procedures is preserved. In agglomerative hierarchical analysis, terms that are the most similar would be connected by a line only one distance from the origin, at level one. Terms combined at the last distance, or level 25, would be the least similar or the most dissimilar.

The dendrogram produced by cluster analysis in SPSS for the selected terms in the search file is shown in Figure 5. The dendrogram demonstrates meaningful patterns of term co-occurrence. In total, the 86 initial terms combine to form 19 clusters of 2 or

***** H I E R A R C H I C A L C L U S T E R A N A L Y S I S *****

Dendrogram using Average Linkage (Between Groups)

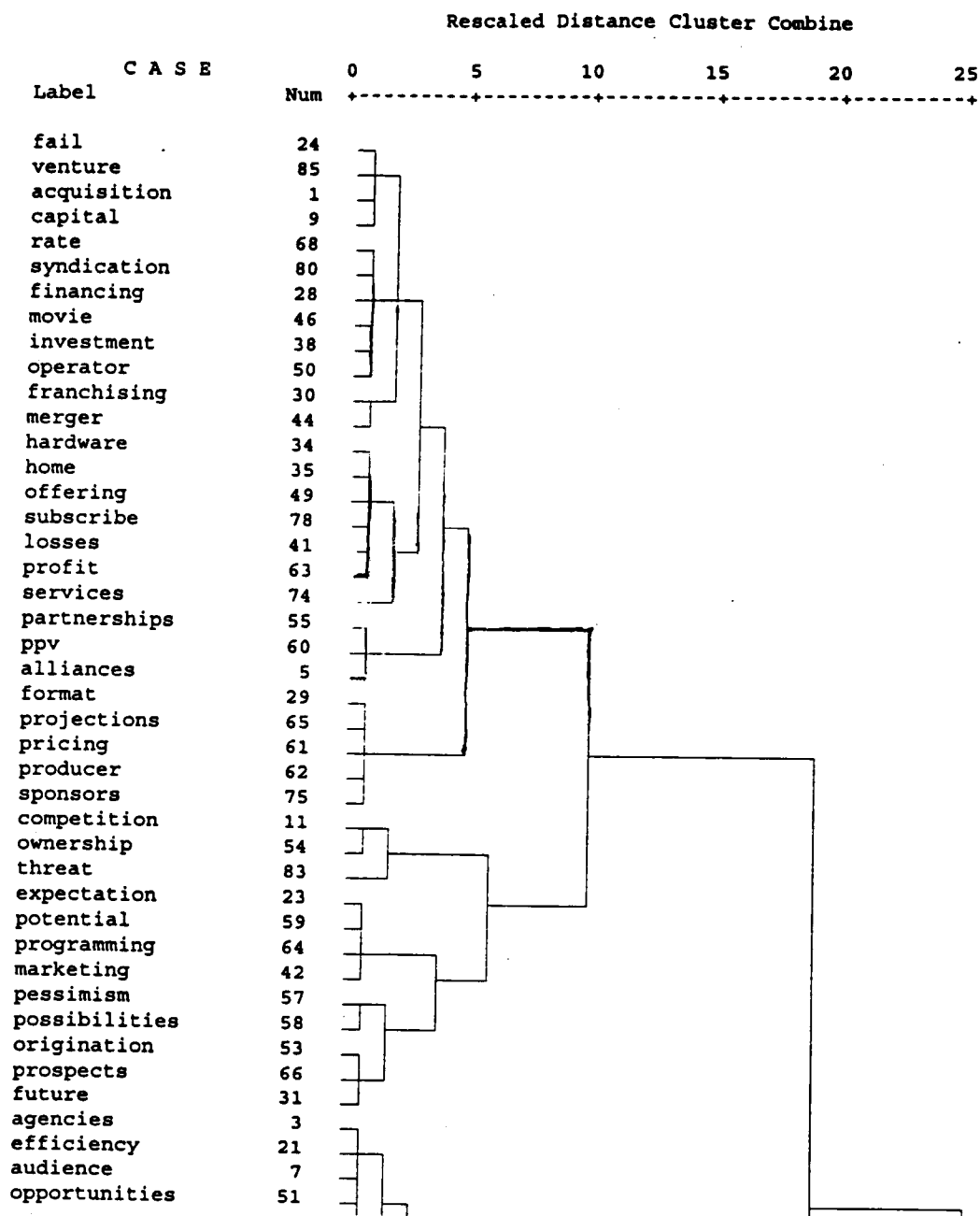


Figure 5.
Hierarchical Cluster Analysis Dendrogram for 86-Term Search List.

***** HIERARCHICAL CLUSTER ANALYSIS *****

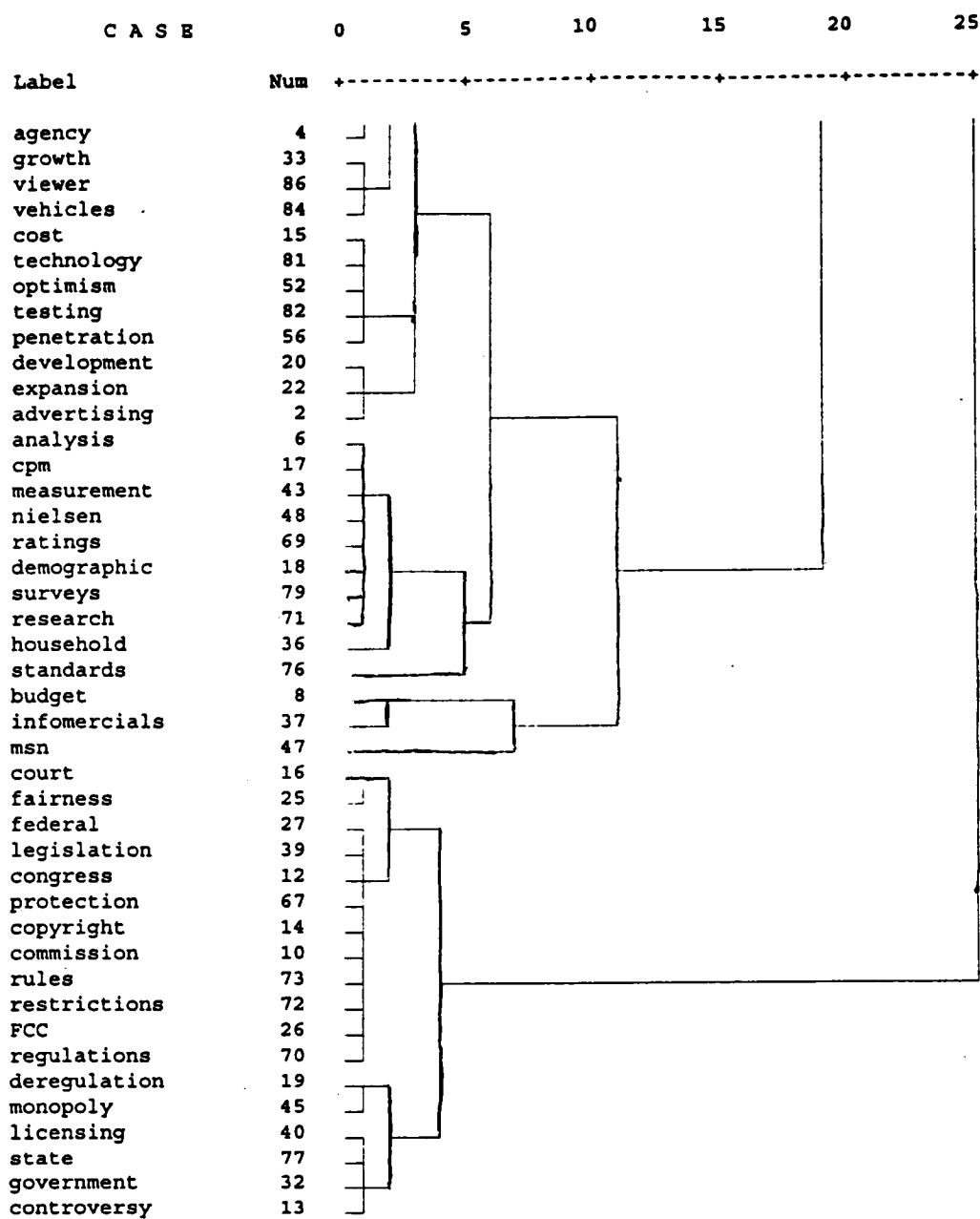


Figure 5. (continued)

more terms joined at the first distance from the origin in the dendrogram. For example, the terms "fail," "venture," "acquisition" and "capital" are joined at the first distance and form the first cluster plotted by the dendrogram, indicating strong tendency to occur together. The largest cluster in the dendrogram is formed by 10 terms: "federal," "legislation," "congress," "protection," "copyright," "commission," "rules," "restrictions," "FCC," and "regulations."

The second largest cluster in the dendrogram—consisting of eight terms—combines "analysis," "cpm," "measurement," "nielsen," "ratings," "demographic," "surveys," and "research." Note that this cluster is not joined to the first cluster (congress, regulation, et. al.) until the 25th, or last, distance in the dendrogram. This suggests that these themes appear with the least degree of co-occurrence. Other large clusters of three or more terms are created by (1) "licensing," "state," "government," and "controversy"; (2) "origination," "prospects," and "future"; (3) "syndication," "financing," "movie," "investment," and "operator"; (4) "hardware," "home," "losses," "offering," "subscribe" and "profit"; (5) "format," "projections," "pricing," "producer," and "sponsors"; (6) "agencies," "efficiency," "audience," "opportunities," and "agency"; (7) "cost," "technology," "optimism," "testing," and "penetration"; (8) "growth," "viewer" and "vehicles"; (9) "development," "expansion" and "advertising"; and (10) "expectation," "potential," "programming" and "marketing."

Five remaining clusters are formed by two terms that join at the first distance: (1) “franchising” and “merger”; (2) “competition” and “ownership”; (3) “pessimism” and “possibilities”; (4) “court” and “fairness”; and (5) “deregulation” and “monopoly.”

Plotting 86 terms in multidimensional space required in concept mapping would be difficult to interpret due to the cluttered information. Instead the co-occurrence information can be reduced further. For the sake of parsimonious analysis, all multi-term clusters (terms joined at the first level) that are joined to others at the second distance from the origin were combined into one larger cluster as long as such a combination could be done without violating the substantive or rational integrity of the themes represented by either cluster. Terms that did not combine with any other at the first distance from the origin were deemed to lack similarity with any others and were removed from further analysis. These terms included “threat,” “services,” “budget,” “infomercials,” “standards” and “msn.”

This second-level clustering occurred in five instances, all involving the combination of two-term clusters with larger clusters. The first instance involves the first and third clusters in the dendrogram. The first cluster (“fail,” “venture,” “acquisition” and “capital”) combined with the “franchising” and “merger” cluster. The larger cluster now contains terms that are interpreted to represent a business or entrepreneurialism frame and was labeled: FRANCHISING.

A typical article representing the FRANCHISING frame is a March 24, 1980, report by Jacques Naher:

Former Arlington Heights Mayor John G. Woods has a part-time job opening doors. While it doesn't pay anything now, it could make him up to \$2,000,000 by 1985.

Mr. Woods, by day a vp corporate counsel for Universal Oil Products in Des Plaines, also has a night job as one of the local partners in Norcom Inc., a company set up in Arlington Heights by Atlanta-based Cox Cable Communications, with the sole purpose of winning and building cable tv franchises in Chicago's northwest suburbs.

An excerpt from a similar article, written by Maurine Christopher, and titled, "Warner Amex's Golden Touch Tarnished in Dallas," also captures the FRANCHISING frame:

Warner Amex Cable Communications may have landed the biggest and the best little cable franchise in the country here 18 months ago, but since it won the franchise, Warner appears to have been dancing the sidestep more than it's been hooking up customers.

Winning the franchise was a coup for the company, which had to submit the franchise to public referendum. But building the franchise has turned out to be a bigger job than Dallas or Warner Amex foresaw.

Having identified and described the first frame to emerge from trade press coverage, the same process is followed in identifying other frames emerging from the analysis. The second cluster combination joins the group by "pessimism" and "possibilities" with the terms represented by "origination," "prospects" and "future."

This cluster now contains terms interpreted to represent the dialectics frame in the introduction of new media as described by Carey (1986) and others. The frame label was labeled PESSIMISM.

A September 11, 1972 article, titled, "CATV Hooking Into More Homes Than Ad Budgets, But Stations Are Wary," highlights the indecisiveness represented by the PESSIMISM frame:

Cable TV is billing less than \$3,000,000 with advertisers, but that doesn't make on air broadcasters feel sanguine about this otherwise fast-growing competitor.... Many admen like George Simko, Benton & Bowles senior vp, continue to believe that CATV will be primarily a local marketing medium that may ultimately develop into a competitor for local on air broadcasters. Despite all the above, TV men such as Elton Rule, American Broadcasting Cos. president, see the threat as closer than ultimate.

A similar frame, labeled EXPECTATION, is composed from key components including "expectation," "potential," "marketing," and "programming." It represents a thematic focus on the programmer's marketing activity to promote or capitalize on the potential of cable television. This theme is represented by an October 26, 1981, article, titled, "Consumer Poll Plugs Into Cable":

Over the past several years, there has been widespread speculation on what effect the new technology, facilities and programming content will have on cable tv audiences....However, the real key to the potential for advertising and marketing among cable subscribers exists among those

consumers whose systems are just now coming on stream or whose communities will be wired in the next two or three years. It is these people who truly hold the key to what cable advertising will be all about.

A fourth cluster combination joins the five term cluster created by “agencies,” “efficiency,” “audience,” “opportunities” and “agency” with the three-term cluster created by “growth,” “viewer” and “vehicles.” This cluster is interpreted to represent the AUDIENCE frame.

A September 6, 1982 article, titled, “The Cost Of Learning About Cable,” represents the AUDIENCE frame:

More and better media research is on the way to cope with satellite and cable television. Those are findings of an Advertising Age Magazine survey of media directors to learn the effects of cable television on media buying...What it amounts to is that satellite and cable are splintering the audience so much that media directors are seeking a whole new research approach involving questions of both how much and what kind.

The largest cluster (“congress,” “regulation,” et. al.) is combined with the cluster formed by the terms “court” and “fairness.” The larger cluster now contains terms that are interpreted to be consistent with the frame of REGULATION. The REGULATION frame is captured by an August 5, 1968, article, titled, “CATV Ruling Affects Rival Ad Attacks”:

In a decision that astonished almost all of the experts and it is said, surprised even the winning party, the U.S. Supreme Court has reversed two lower federal courts and ruled that CATV systems do not "perform" copyrighted program material that they pick up from regular television broadcasts and therefore they are not infringers. Putting it another way, the CATV systems can transmit to their subscribers by wire, television programs that include, for example, copyrighted feature motion pictures without the consent of the copyright proprietor and without payment for the privilege.

The REGULATION frame captures the rather heated rhetoric characterized by reports of legal action and numerous key note addresses by leading broadcasting industry figures. Cable television is depicted as a threat to the present system and its practitioners are regarded by the established groups as "pirates and thieves."

Yet another logical combination involves the two-term cluster formed by "deregulation" and "monopoly" with the larger four-term cluster formed by "licensing," "state," "government," and "controversy." These terms are interpreted to be consistent with the frame of MONOPOLY. The frame issue involves a somewhat secondary legal controversy, spawned by rapid growth and expansion, rather than the heated turmoil characteristic of the MONOPOLY frame as portrayed in a November 16, 1981, article:

The burdensome FCC program and access rules were eliminated; efforts to impose a separations policy fizzled; the compulsory copyright license is intact; telephone company competition in cable service is still limited to rural areas; state regulation is manifested essentially in basic service rates and access requirements; alleged improprieties in franchise

practices are not adversely affecting cable companies; franchise fees are capped and pole attachment rates are quite attractive.

Some have argued that any company that owns the transmission facilities has an inherent monopoly and, as with utilities but unlike broadcasters, the same company should not determine what programs are transmitted.

At this point, the established groups have begun to develop their own cable presence, as still others rise from the chaos to take leadership roles. The regulatory concern shifts from copyright violations to regulating fees, especially since most markets were controlled by a single cable provider.

The remaining nine clusters, which are not joined to any others at the second level, are interpreted as constituting distinct frames without further combinations. The frame of COMPETITION is formed by the two-term cluster of "competition" and "ownership." The history of cable television is dotted with strong personalities, such as Ted Turner and John Malone. Ted Turner controls one of the largest media empires that includes, in part, CNN, the first all-news cable television station. It is Turner's TBS (Turner Broadcasting Station) that spawned the concept of the cable Super-Station. John Malone controls the largest cable system group and is considered by many to be the most powerful man in the cable business because of his control over the delivery systems. Both men are considered mavericks.

A November 9, 1987 article captures the mixture of competition and personality in the frame:

"I challenge anybody to tell me I'm not supposed to defend my subscribers' interests -- that I should lay down, bend over and pass it through. Is that what I'm supposed to do? Make the cable industry a gathering place for all the rapacious appetites in the programming industry? Bullshit."

People who know him well say that is vintage Malone. He is tough-talking, tough-acting, sometimes abrasive and partial to a little bravado. To bring ABC to heel, Mr. Malone used the start-up of a new cable sports network competing with ESPN, a joint venture involving Anheuser-Busch, a key sports sponsor.

The frames ADVERTISING, MEASUREMENT and PENETRATION are substantively quite similar and co-occur with some degree of frequency as evidenced by the close clustering of these frames. Note the similarities and proximity of these three with the AUDIENCE frame discussed earlier, the meaning of which will be discussed in greater length in a later section. Three articles, one for each of the related frames, shows the similarity:

ADVERTISING: (May, 31, 1984)

It appears that advertising-supported cable TV has evolved into two distinct media, one adhering to broadcast-like qualities and the other fulfilling cable's original promise of appealing to diverse, highly segmented audiences. Senior agency and client executives confirm that ad-supported cable suffers from an identity crisis that threatens to destroy its long-term growth potential.

MEASUREMENT: (November 21, 1985)

The cable tv industry got off on the wrong foot in audience measurement.

Proclaiming cable a new and different medium, its leaders shunned established tv measurement system as inappropriate. The cable industry feared conventional household diary measurement because that technique was revealed early on to seriously understate cable audiences. Efforts to find an acceptable new methodology failed, while agency buyers sought measurements comparable to those used successfully for broadcast tv.

PENETRATION: (June 22, 1981)

Headline: "Bristol-Myers to pioneer \$40,000,000 in cable tv shows."

Headline: "Times Mirror launches shopping channel on six system."

Headline: "Westinghouse, Teleprompter agree to \$646,000,000 cable tv merger." Headline: "Young & Rubicam cable billings exceed

\$10,000,000 in '81."

The message is loud and clear: The "biggies" are saying, "We're ready for cable." Thus, a prediction by Bill Donnelly, media specialist at Y&R: "Major advertisers will get into cable when cable reaches 30% of tv households." , is about to come true. The current penetration is about 27%.

The PARTNERSHIPS frame represents the activity of alliances, particularly associated with the pay-per-view segment of cable television. A December 5, 1985, headline, Pay-Per-View Ventures Take On Videocassettes, represents the theme of the PARTNERSHIP frame:

PPV. It doesn't sound like a weapon, but the cable industry is counting on it to help win the home entertainment technology battle. Faced with competition from videocassette recorders, which A.C. Nielsen Co. reports are in 40% of U.S. households, cable companies hope that offering subscribers on-demand movies and specials at a per-event fee will keep consumer interest focused on cable channels.

The frames INVESTMENT, HOMES and FORMAT tend to cluster together and their substantive themes are related to the infrastructure needed to deliver cable content to its subscribers:

INVESTMENT: (May 7, 1984)

The Turner Broadcasting System is giving a reprieve to some cable-system operators carrying its Cable News Network or its CNN Headline News that had been bracing for a penalizing rate increase this summer.

In some cases, the revised rate structure will mean those cable operators will incur only half the rate increase they had expected.

HOMES: (November 15, 1982)

Finding that viewers would eagerly buy as many as four pay tv services, cable operators across the U.S. last year scrambled to add new networks to their systems. But many are panicking, now that a number of those same viewers are disconnecting some or all of the services they bought.

FORMAT: (October 19, 1981)

Several "battles of New Orleans" were fought at the first National Cable Television Association./Cable Television Administration & Marketing Society software convention, and their weapons included sales spiels, ads in catv trade publications and promotional literature handed out at the exhibit booths. The movie, sports, music, children's and old tv series categories were among the most numerous at the exposition's 100 booths.

Table 5 displays the resulting 14-frame structure and includes the respective subordinate terms as combined from the original 86 key-term frequency ranking

Table 5
Cable Television Frames and Component Key Terms

Frame (Map Coordinates)	Primary Selected Key Term	Component Key Terms
(1) regulation (-.33, .58, .02)	regulation	regulations regulation's regulations' regulate regulates regulatory regulator regulative
	congress	congress' congressional
	protection	protect protects
	copyright	copyrights copyrighted copyright's copyrights' commission
	commissions	commission's commissions'
	rules	rule rule's rules' ruling rulings ruling's rulings'
	FCC	FCC's FCCs'
	restrictions	restriction restriction's restrictions' restricting
	federal	federally
	legislation	legislations legislations'

Table 5 (continued)

Frame	Primary Selected Key Term	Component Key Terms
(2) monopoly (-.10, .27, .28)	fairness	legislation's legislate legislated legislates legislating
		fair fairer
		courts court's courts'
	monopoly	monopolies monopoly's monopolize monopolizes monopolizing monopolists monopolists' monopolist's
		deregulation
		deregulatory
		controversy
		controversies controversial
		government
		government's
		licensing
		licenses
(3) competition (.10, .26, .27)	competition	state
		state's states'
		compete competes competing competed competition's competitions competitions' competitive competitor competitor's

Table 5 (continued)

Frame	Primary Selected Key Term	Component Key Terms
(4) pessimism (.18, .40, -.06)	ownership	competitors competitors'
		owners own
		owner owner's owners' owns owned
	pessimism	pessimistic pessimistically possibilities possibility possibilities' possibility's
		origination
	prospects	originate originated originating originates original originally
		prospect prospects' prospect's future futures future's futures'
		expectations expectation's expectations' expect
	potential	potentially potentials
	marketing	market markets
(5) expectation (.37, .22, -.01)		

Table 5 (continued)

Frame	Primary Selected Key Term	Component Key Terms
		markets' marketer marketer's marketers' marketing's marketable
	programming	program programing programs program's programs' programmed programed programer programmer programmers programmers' programmer's programers programers' programer's
(6) investment (.28, .09, .37)	investment	investments investment's investments' investors investor investor's investors'
	rate	rates rate's rates'
	syndication	syndicated syndicating syndications syndication's syndications' syndicators syndicators' syndicator's syndicator syndicates

Table 5 (continued)

Frame	Primary Selected Key Term	Component Key Terms
		syndicate's syndicates'
	financing	finance financial
	movie	movies movie's movies'
	operator	operators operator's operators' mso mso's msos msos'
(7) homes (.37, .08, .22)	homes	home home's homes'
	losses	loss
	offering	offering's offerings offerings'
	subscribe	subscribes subscribing subscribed subscriber subscribers subscribers' subscriber's subscription subscriptions subscription's subscriptions'
	profit	profits profit's profits' profitable

Table 5 (continued)

Frame	Primary Selected Key Term	Component Key Terms
(8) partnerships (.12, -.45, .27)	hardware	
	partnerships	partnership partners partnership's partnerships' partner's partners' partner
	alliances	alliance alliance's alliances'
	ppv	ppv's
(9) franchising (.14, -.04, .50)	franchising	franchise franchises franchisee franchiser franchisee's franchiser's
		franchisers' franchisees' franchise's franchises'
	merger	mergers mergers' merger's merging merging's mergings' mergings
	fail	failure failures failure's failures'
	venture	venture's ventures ventures'

Table 5 (continued)

Frame	Primary Selected Key Term	Component Key Terms
(10) format (.39, -.05, .13)	acquisition	acquisitions acquisition's acquisitions' acquire acquired acquiring
	capital	
	format	formats formatting format's formats'
	projections	projection's projection projecting pricing price prices price's prices'
	producer	producers producer's producers' produce producing production produced
	sponsors	sponsor sponsor's sponsors' sponsorship
(11) audience (.46, .11, -.38)	audience	audience's audiences audiences' opportunities opportunity
	agencies	agencies' agency

Table 5 (continued)

Frame	Primary Selected Key Term	Component Key Terms
(12) penetration (.38, .21, -.26)	efficiency	agency's
		efficient
	growth	growing
		grow
	viewer	grown
		viewers
		viewer's
		viewers'
		viewership
		viewing
(13) advertising (.38, .21, -.26)	penetration	vehicle
		vehicles
		vehicle's
		vehicles'
	technology	penetrate
		penetrated
	testing	penetrates
		technologies
	optimism	tests
		test
(13) advertising (.38, .21, -.26)	cost	test's
		tests'
		optimistic
		optimistically
		costs
		cost's
		costs'
	advertising	ads
		advertisement
		advertisements
		advertisement's
		commercials
		ads'
		advertisements'
		commercials'

Table 5 (continued)

Frame	Primary Selected Key Term	Component Key Terms
		commercial's ad's ad advertise advertised advertiser advertiser's advertisers advertisers' advertising advertising's
		expansion
		expansions expansive expanded expand
		development
(14) measurement (.43, -.05, -.46)	measurement	develop develops developments development's developments'
		measurements measurement's measurements analysis analyze analyses cpm cpms' cpms cpm's nielsen nielsen's nielsens ratings rated rating ratings' rating's
		demographic
		demographics demographic's

Table 5 (continued)

Frame	Primary Selected Key Term	Component Key Terms
	surveys	demographics' demographically survey survey's surveys' surveying surveyed
	research	researches research's researchers researcher researcher's researchers'

procedure. The 14 clusters represent different frames in the cable television issue. It proved useful to submit this 14-frame list to VBPro and VBMap for coding, hierarchical cluster analysis, and frame mapping. The resulting 14-frame dendrogram and frame map provided a benchmark to evaluate movement in the clusters when the second research question is evaluated by adding five additional code-identifier terms.

A new 14-term search file was created in WordPerfect and submitted to VBPro for coding. The output file consisted of a 718 x 14 matrix; 718 rows for each article and 14 columns for each of the 14 frame terms containing the respective frequencies of frame occurrence. This output file was submitted, in turn, to VBMap to extract the principal components for hierarchical cluster analysis and frame mapping. The VBMap output file was submitted to SPSS for hierarchical cluster analysis. As before, the dendrogram plot and cosine method were selected.

The resulting dendrogram (see Figure 6) shows three clusters combined prior to the fifth distance from the origin: (1) REGULATION and MONOPOLY, (2) AUDIENCE, ADVERTISING, PENETRATION and MEASUREMENT, (3) INVESTMENT, HOMES and FORMAT, and (4) PESSIMISM and EXPECTATION. Two frames form a cluster at the 7th distance: PARTNERSHIPS and FRANCHISING. The remaining frame, COMPETITION, is not joined by any other frame until the 8th distance from the origin.

***** H I E R A R C H I C A L C L U S T E R A N A L Y S I S *****

Dendrogram using Average Linkage (Between Groups)

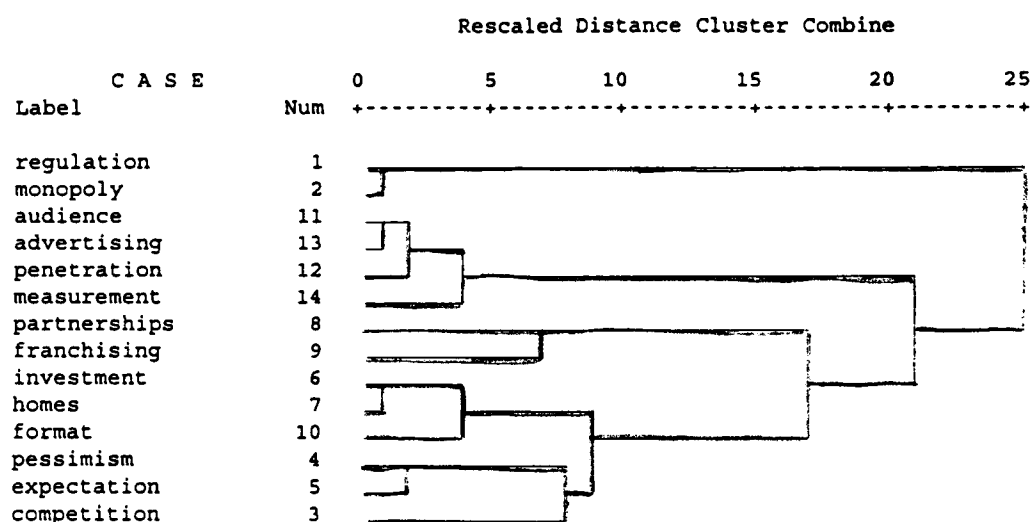


Figure 6.
Hierarchical Cluster Analysis Dendrogram for 14 CATV Frames.

The principal component values extracted by VBMap for each of these 14 frames were used to create a multidimensional frame map as shown in Figure 7. The three dimensional coordinate values for each of the category groups or clusters are shown in Table 6.

The frame map can be produced by carefully drawing a scaled graph using desktop publishing software (Aldus PageMaker in this study) or submitting the coordinates to a three-dimensional graphing program. The frame mapping procedure employs cluster analysis to reduce the 86 selected terms of interest into an interpretable visual representation of the data structure now represented by 14 frames. The first coordinates for the mapped frames span from .63 (MEASUREMENT) to -.32 (MONOPOLY) indicating that the difference, or dissimilarity, between these two frames is represented by the greatest distance. Indeed, in the dendrogram the two frames are not combined until the final, or 25th distance.

Note that the proximity of the frames REGULATION (-.27, .64, -.01) and MONOPOLY (-.32, .42, -.11) are consistent with the results from the dendrogram in Figure 6. The frames AUDIENCE (.56, .13, -.08) and ADVERTISING (.42, .21, .06) are also consistent in occupying space in the three-dimensional graph in close proximity. The dendrogram and frame map of the 14 terms will be used in later discussion in this section to compare the movement of the frames when subjected to the addition of the five adopter period identifier terms. Minimal movement by the frames

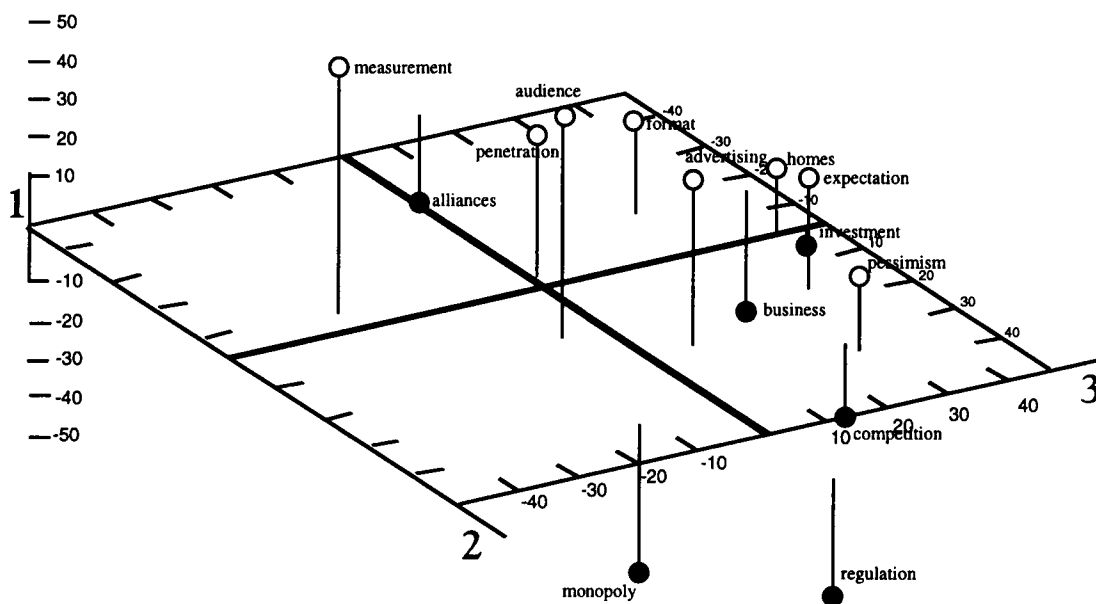


Figure 7.
Concept Map from Multidimensional Scaling of 14 Cable Television Frames.

Table 6
Map Coordinates (Principal Components) for 14 Cable Television Frames

Frame	Coordinate 1	Coordinate 2	Coordinate 3
regulation	-0.273	0.635	-0.012
monopoly	-0.323	0.415	-0.107
competition	-0.127	0.247	0.300
pessimism	0.160	0.324	0.232
expectation	0.271	0.167	0.271
investment	-0.030	-0.003	0.443
homes	0.129	-0.017	0.388
partnerships	-0.166	-0.581	0.185
franchising	-0.239	-0.160	0.405
format	0.222	-0.140	0.279
audience	0.565	0.126	-0.080
penetration	0.356	-0.040	0.008
advertising	0.424	0.205	0.062
measurement	0.625	-0.055	-0.345

increases confidence in clusters when they demonstrate stability; confidence is also increased when cases in different clusters also differ on external criteria (e.g., statistically significant differences between independent groups as applied in the next section), and when relationships among variables make sense criteria (e.g., logical consistency given context) (Rapkin and Luke, 1993).

Time Series Plots of Cable Television Frames. Since visualization of the data structure has proven so useful, plotting the 14 cable television frames along a time series should provide additional clues as to the ebb and flow of their appearance across time. Figures 8 - 21 show the respective frequency plots for each cable frame. While the ADVERTISING frame (Figure 15) demonstrates spikes in the late 1960s and early 1980s, it appears that the occurrence of the ADVERTISING frame is fairly consistent during the entire span of cable diffusion.

The plots of frequency occurrence for the AUDIENCE (Figure 14), PESSIMISM (Figure 18), COMPETITION (Figure 11), EXPECTATION (Figure 12), FRANCHISING (Figure 13) and PENETRATION (Figure 14) similarly show spurts of activity in some periods but overall coverage appears to be relatively constant throughout the 34-year period. A visual examination of the frequency plots for the frames interpreted as REGULATION, FORMAT, HOMES, INVESTMENT, INVESTMENT, MEASUREMENT and FRANCHISING reveals some tendency for periods of greater intensity than others.

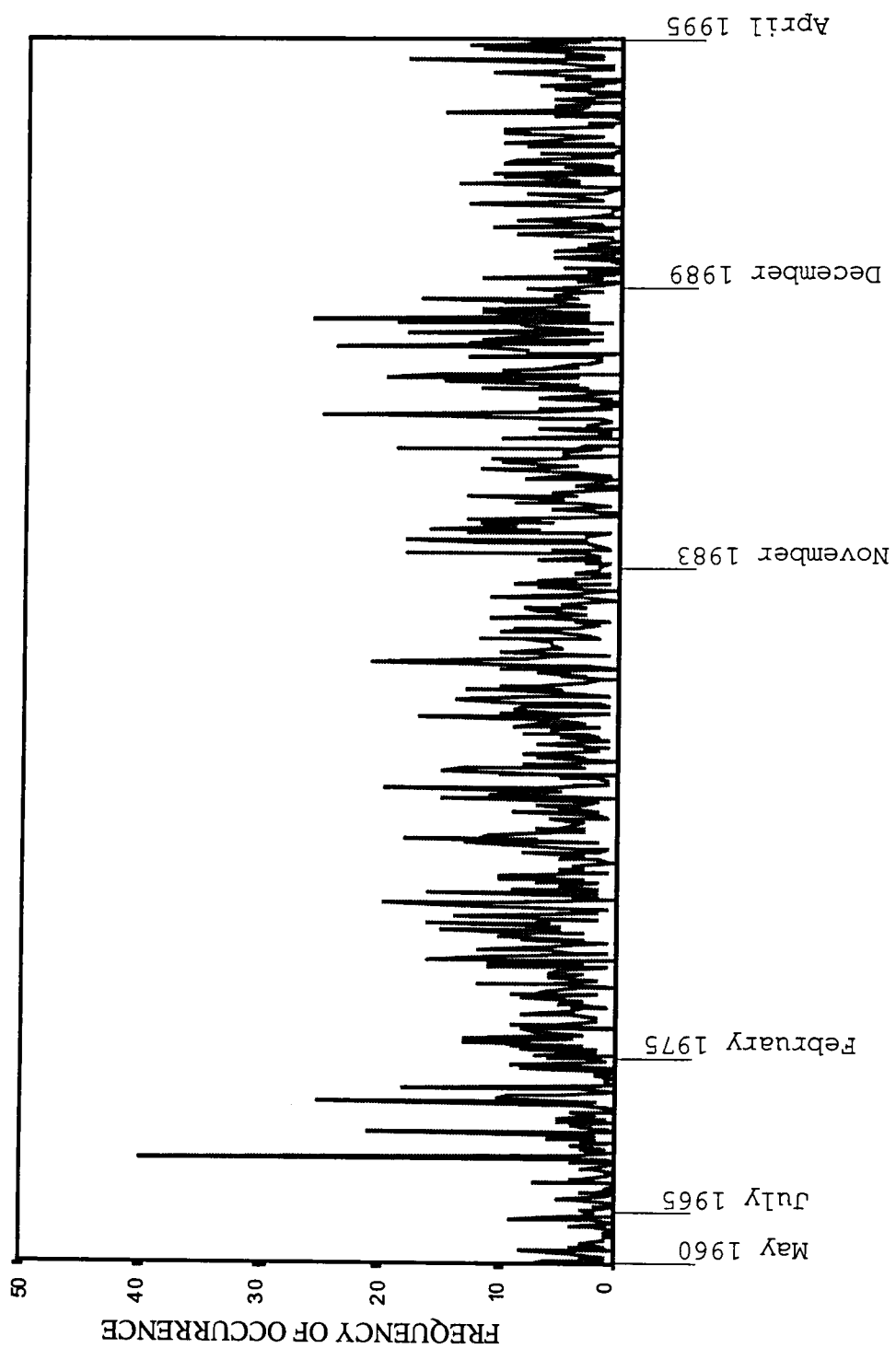


Figure 8
Time Series Plot of HOMES Frame

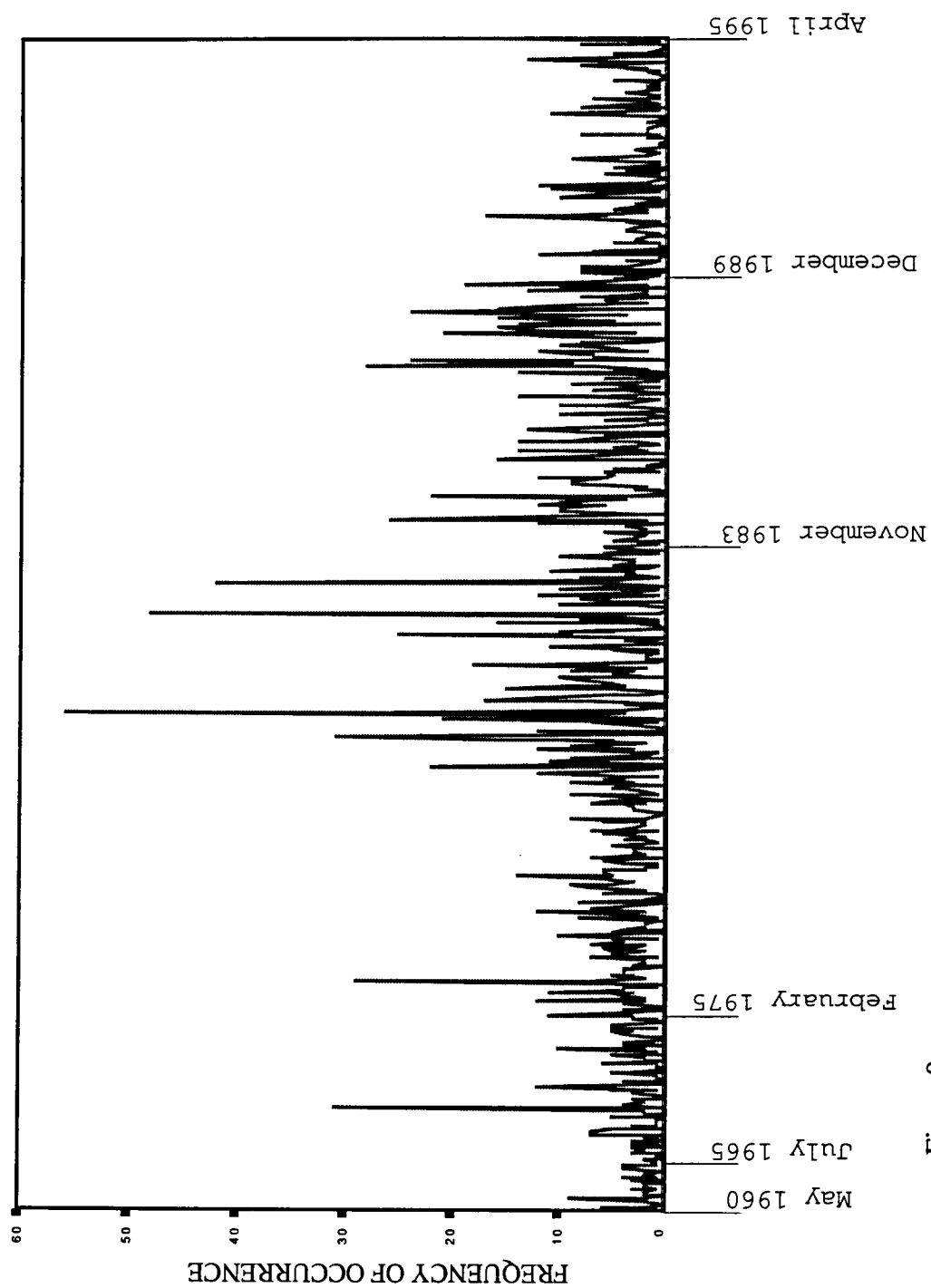


Figure 9
Time Series Plot of INVESTMENT Frame

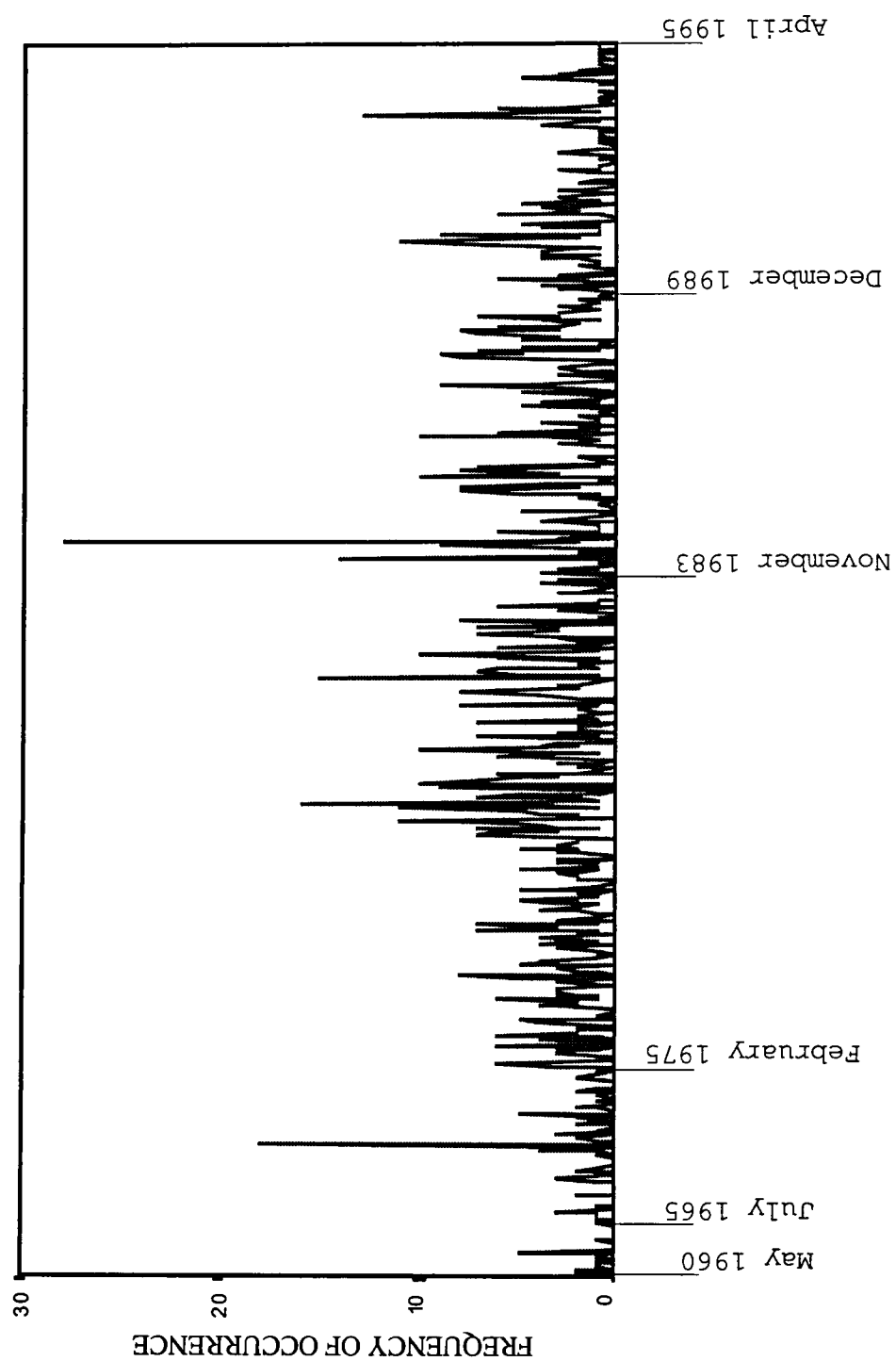


Figure 10
Time Series Plot of FORMAT Frame

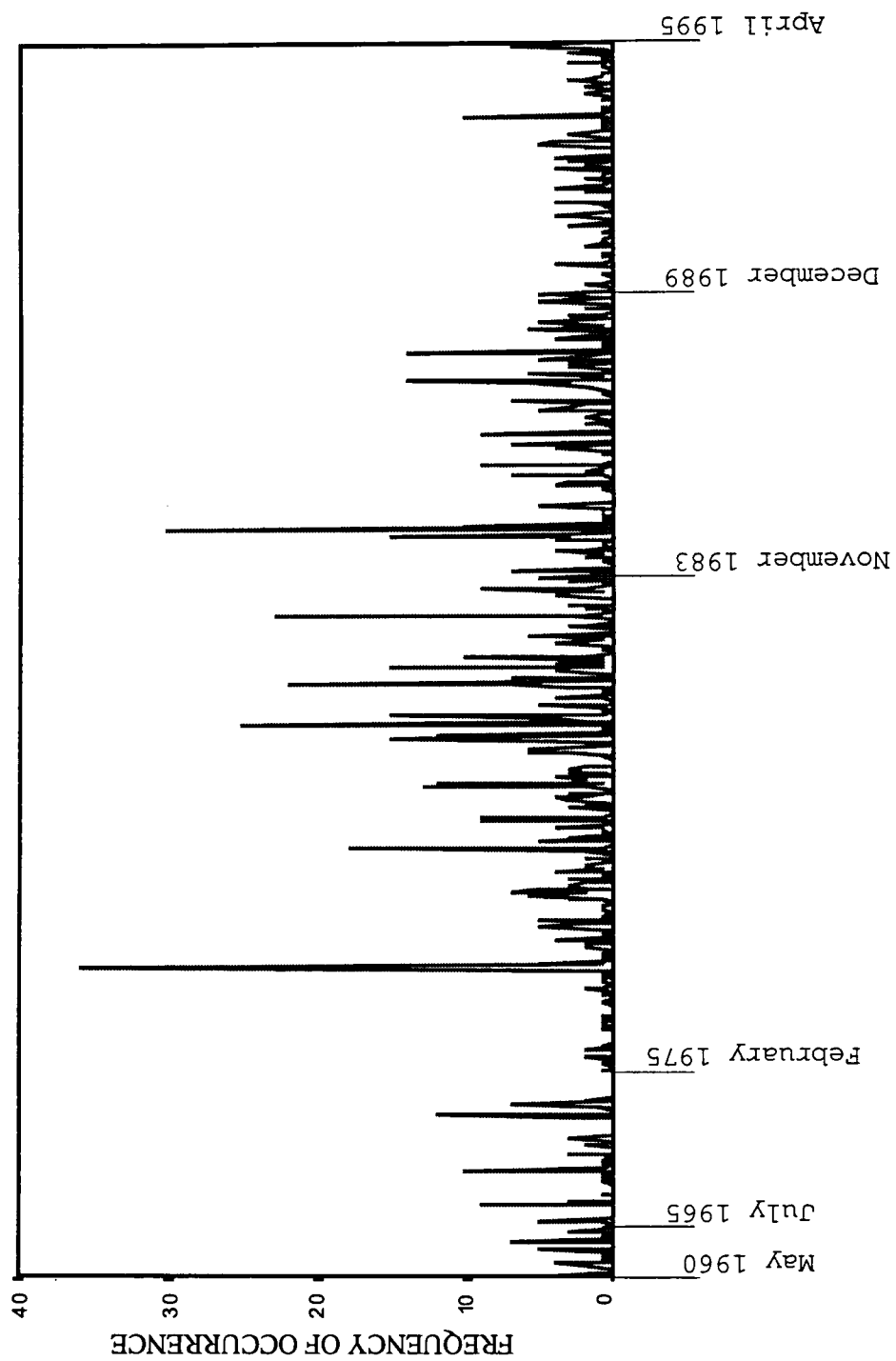


Figure 11
Time Series Plot of FRANCHISING Frame

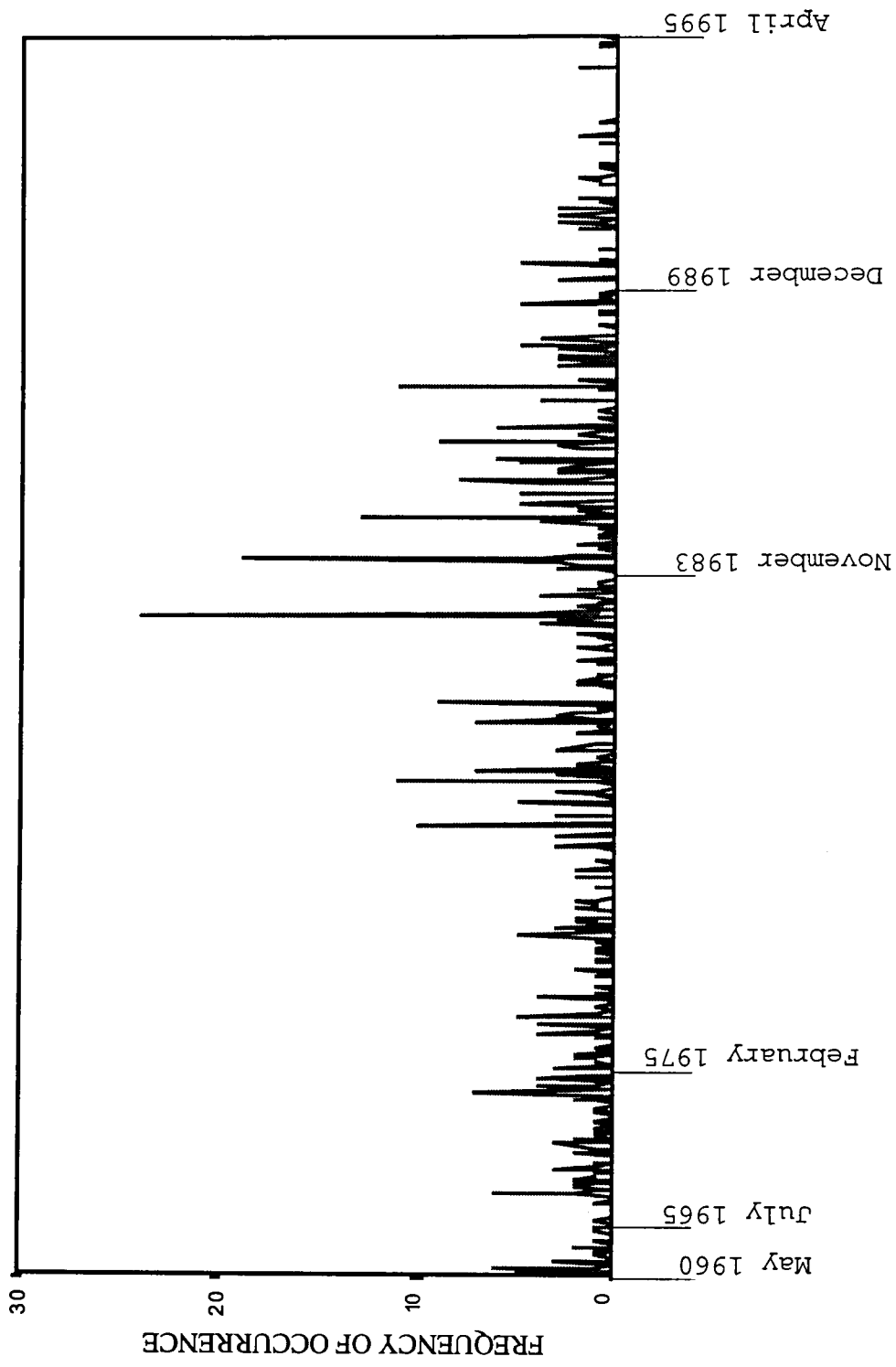


Figure 12
Time Series Plot of MONOPOLY Frame

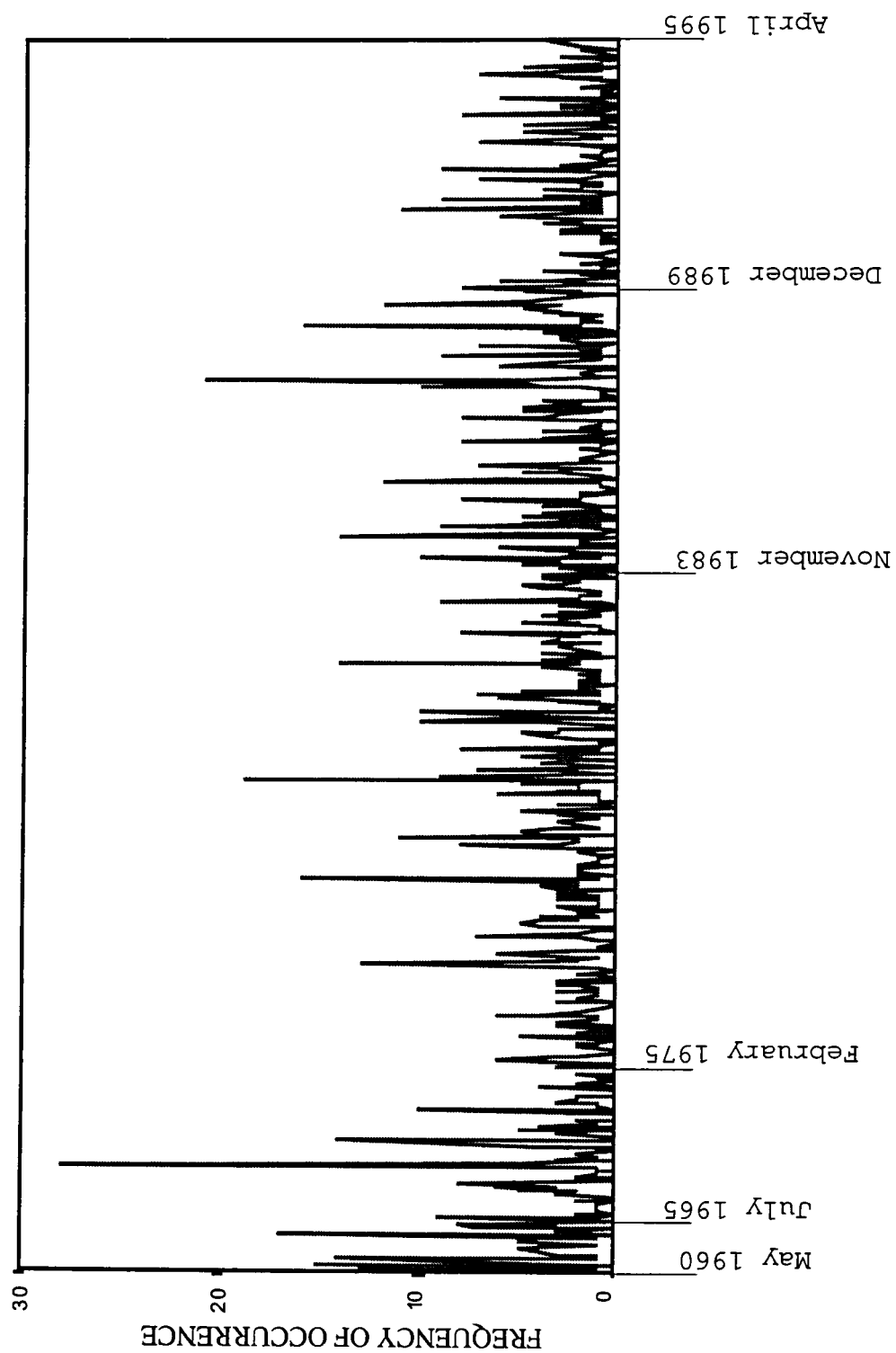


Figure 13
Time Series Plot of COMPETITION Frame

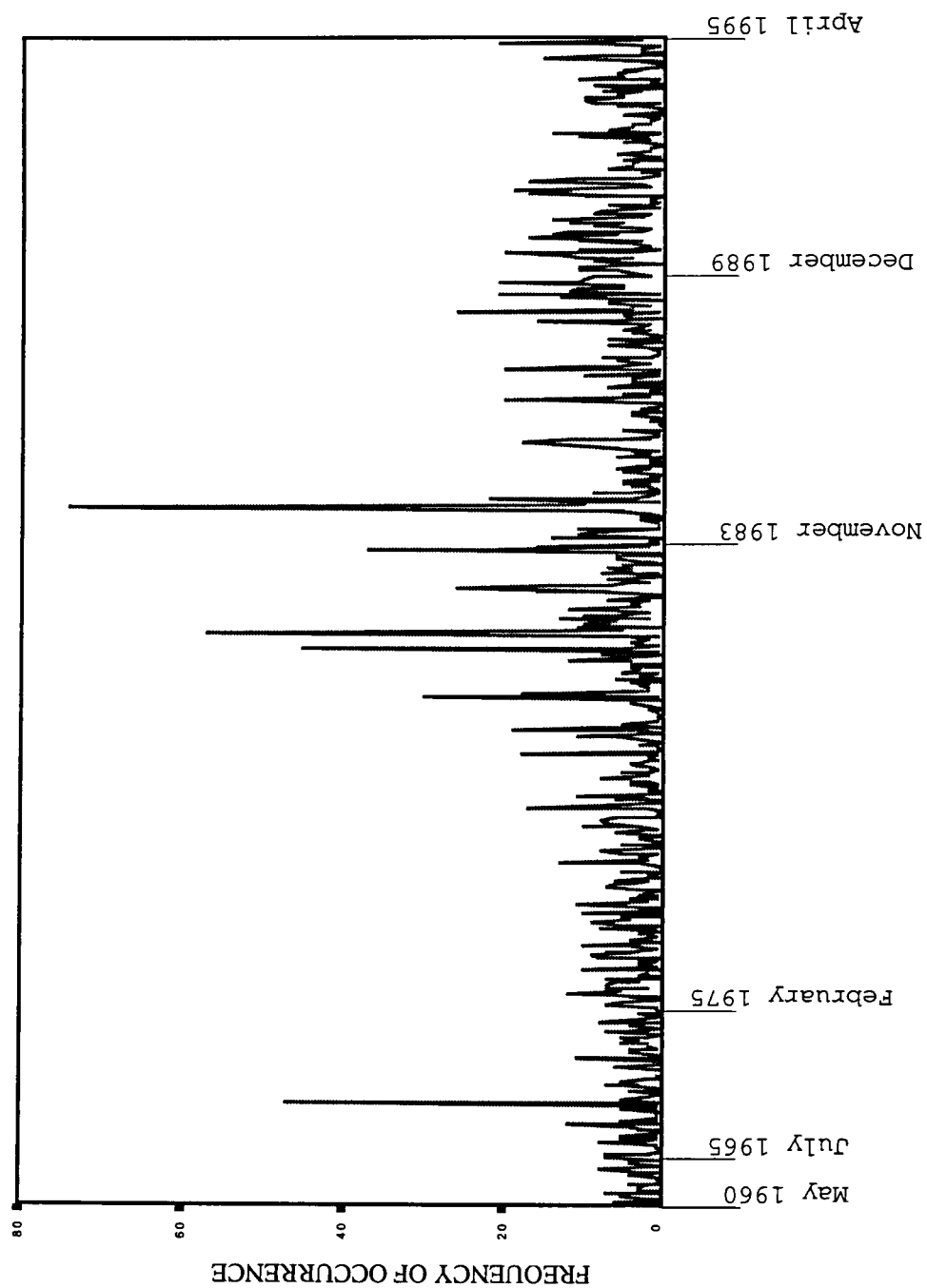


Figure 14
Time Series Plot of AUDIENCE FRAME

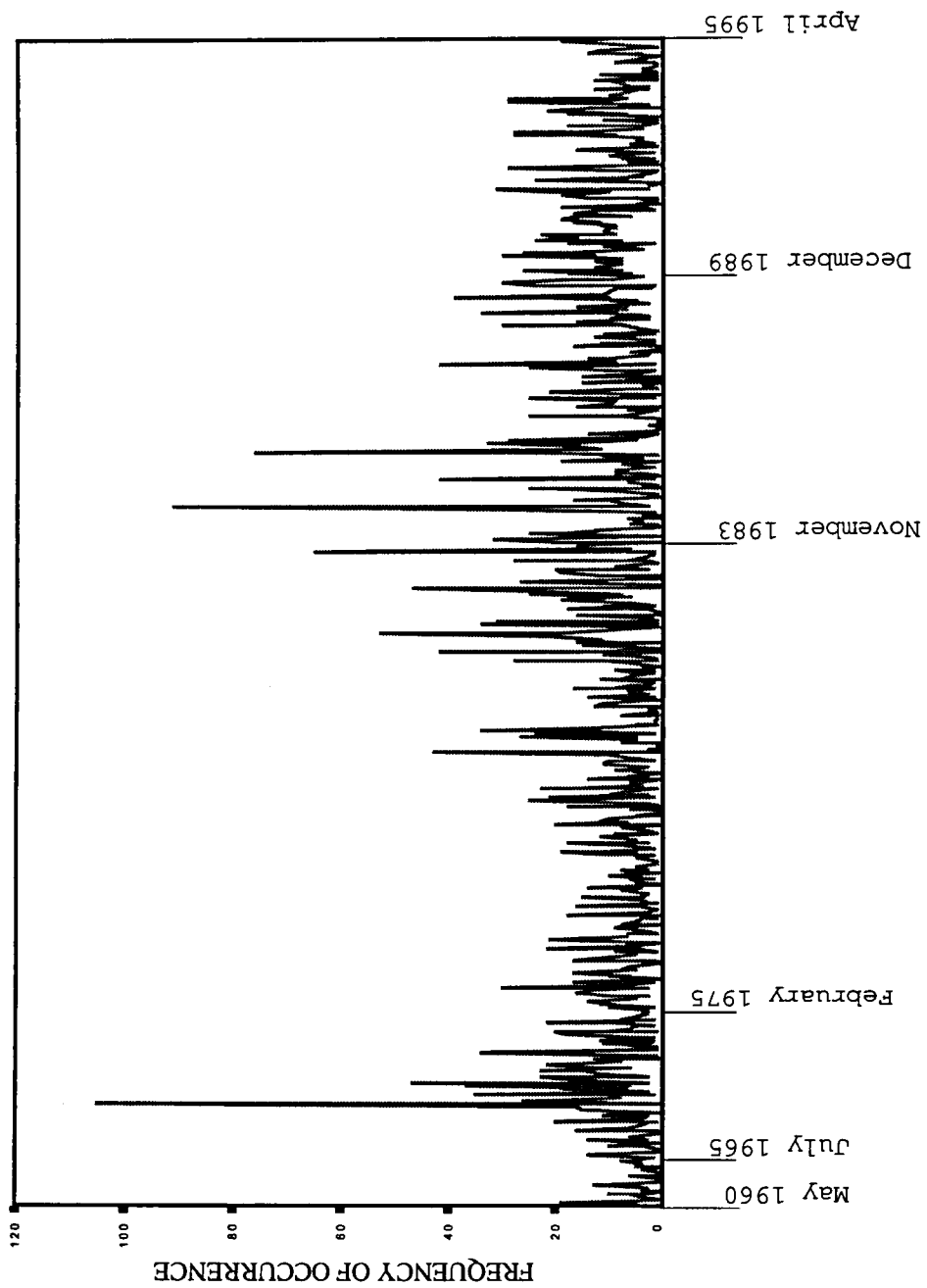


Figure 15
Time Series Plot of ADVERTISING Frame

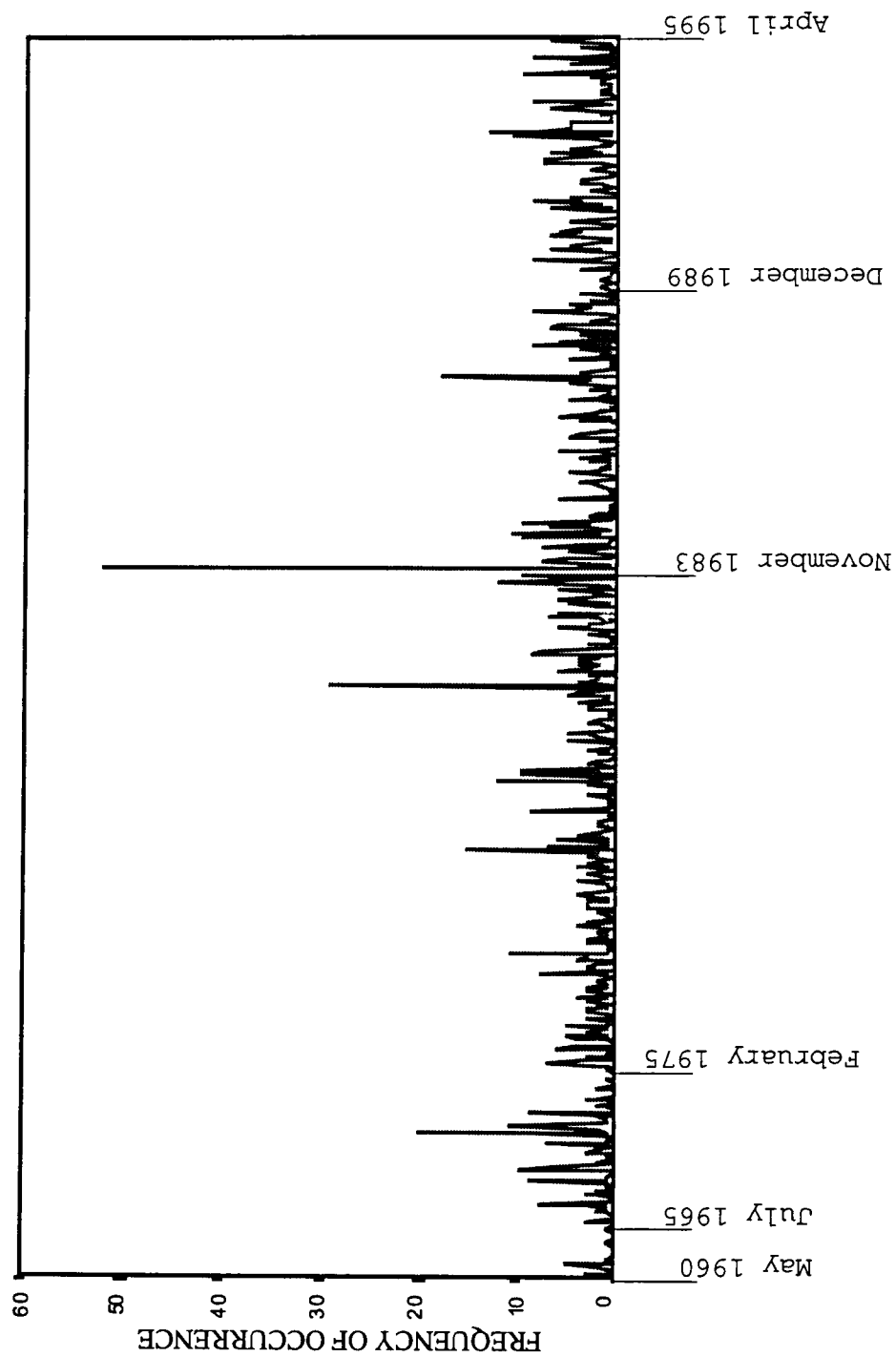


Figure 16
Time Series Plot of PENETRATION Frame

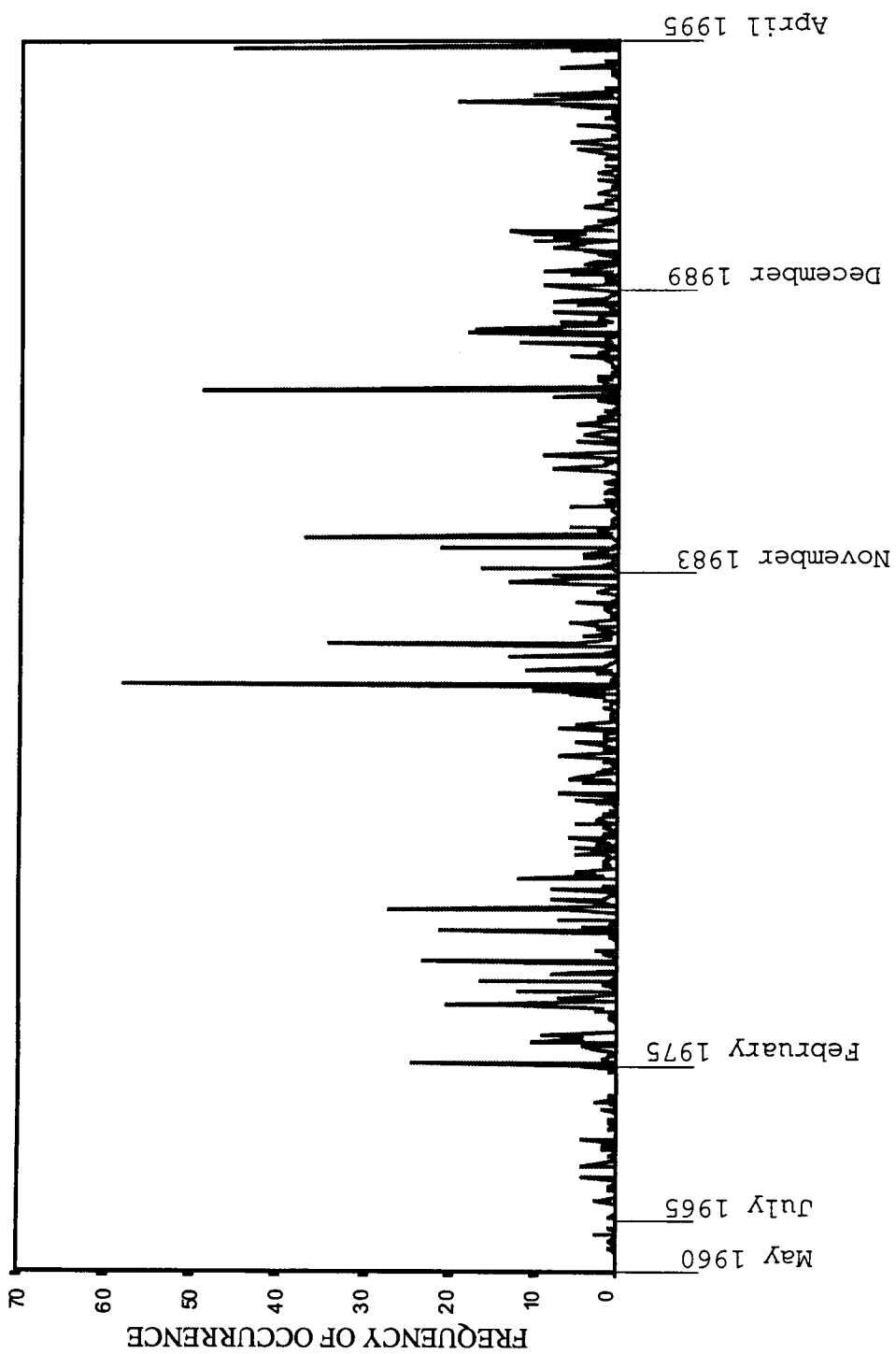


Figure 17
Time Series Plot of MEASUREMENT Frame

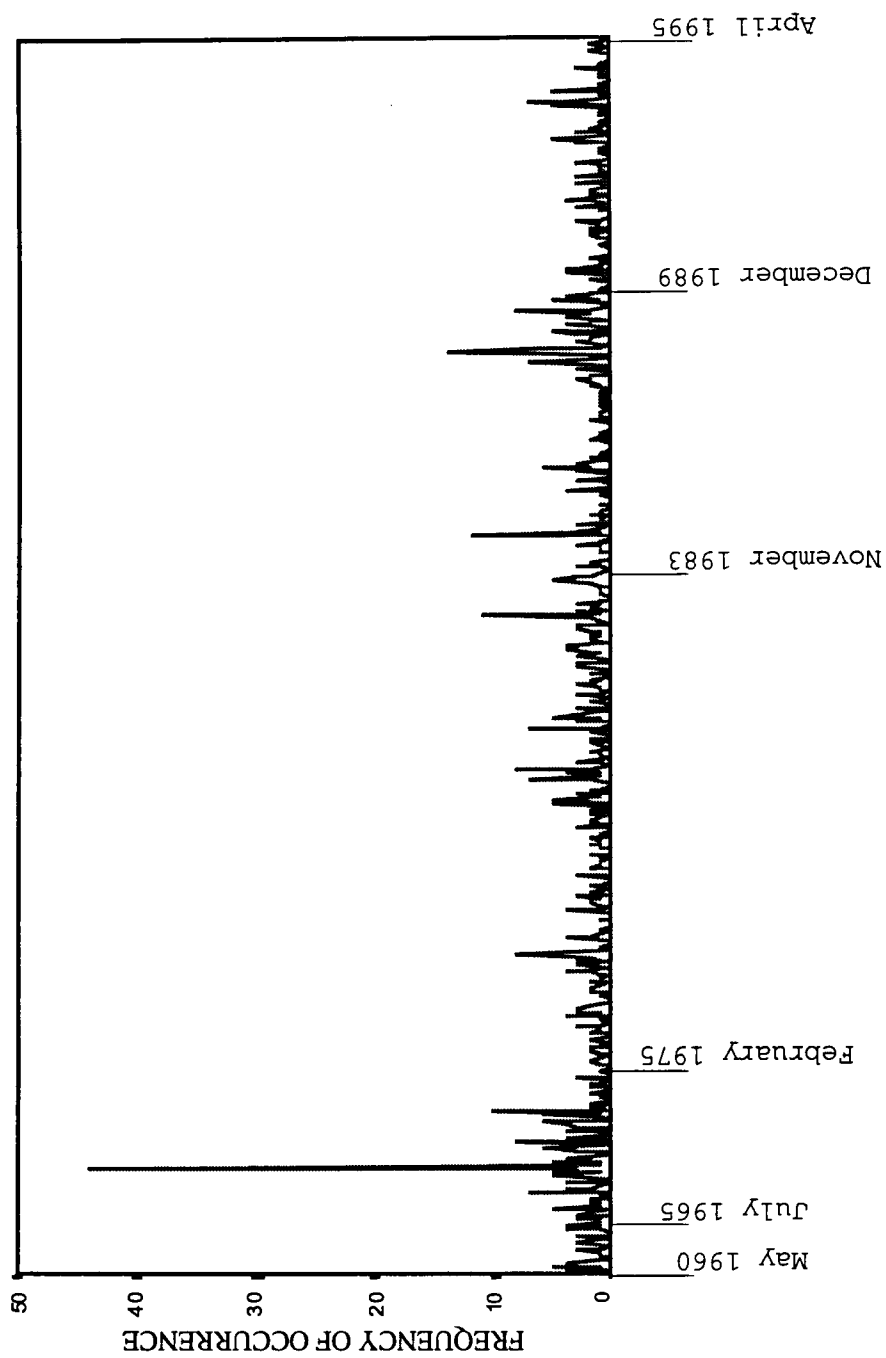


Figure 18
Time Series Plot of PESSIMISM Frame

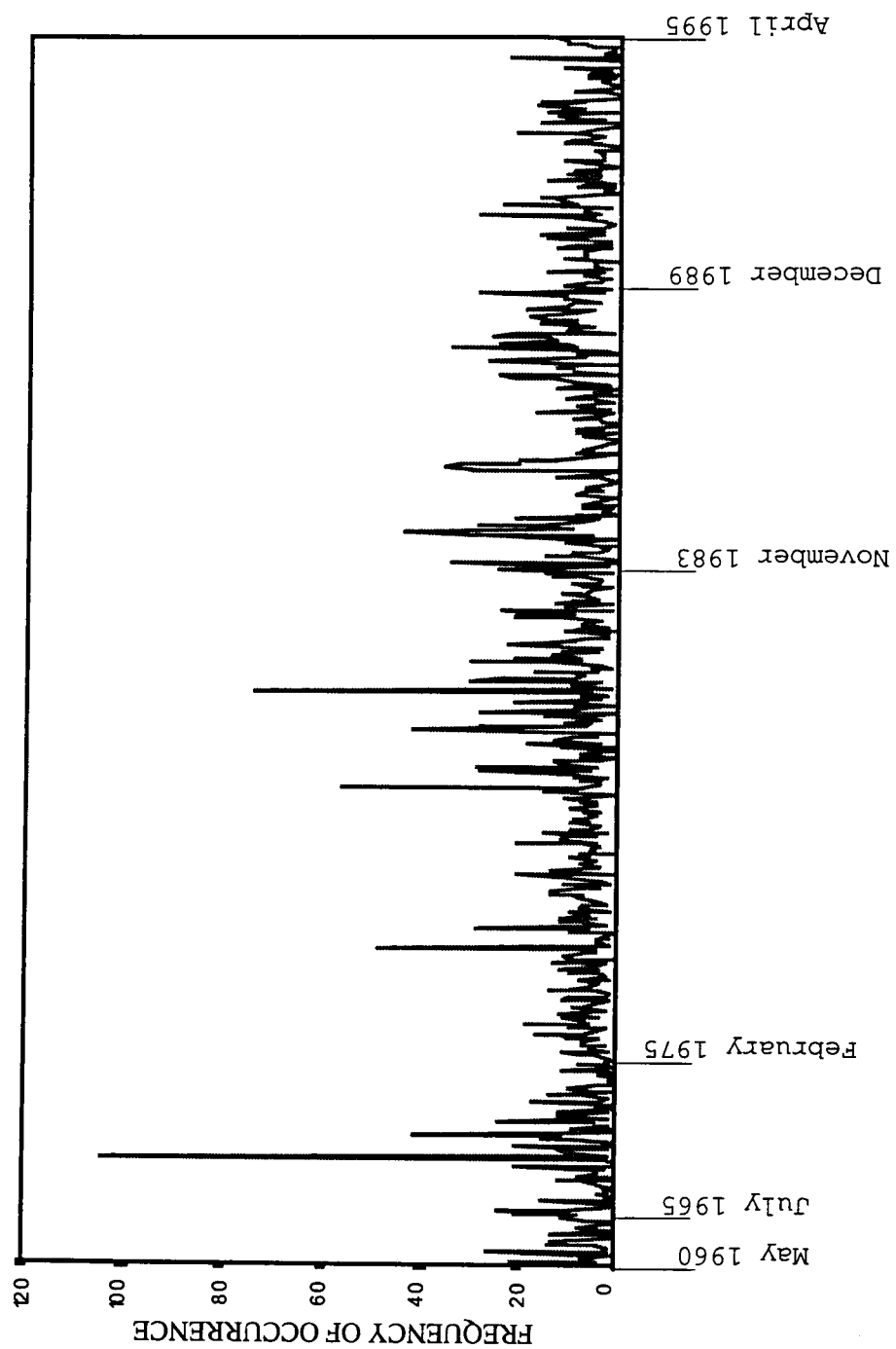


Figure 19
Time Series Plot of EXPECTATION Frame

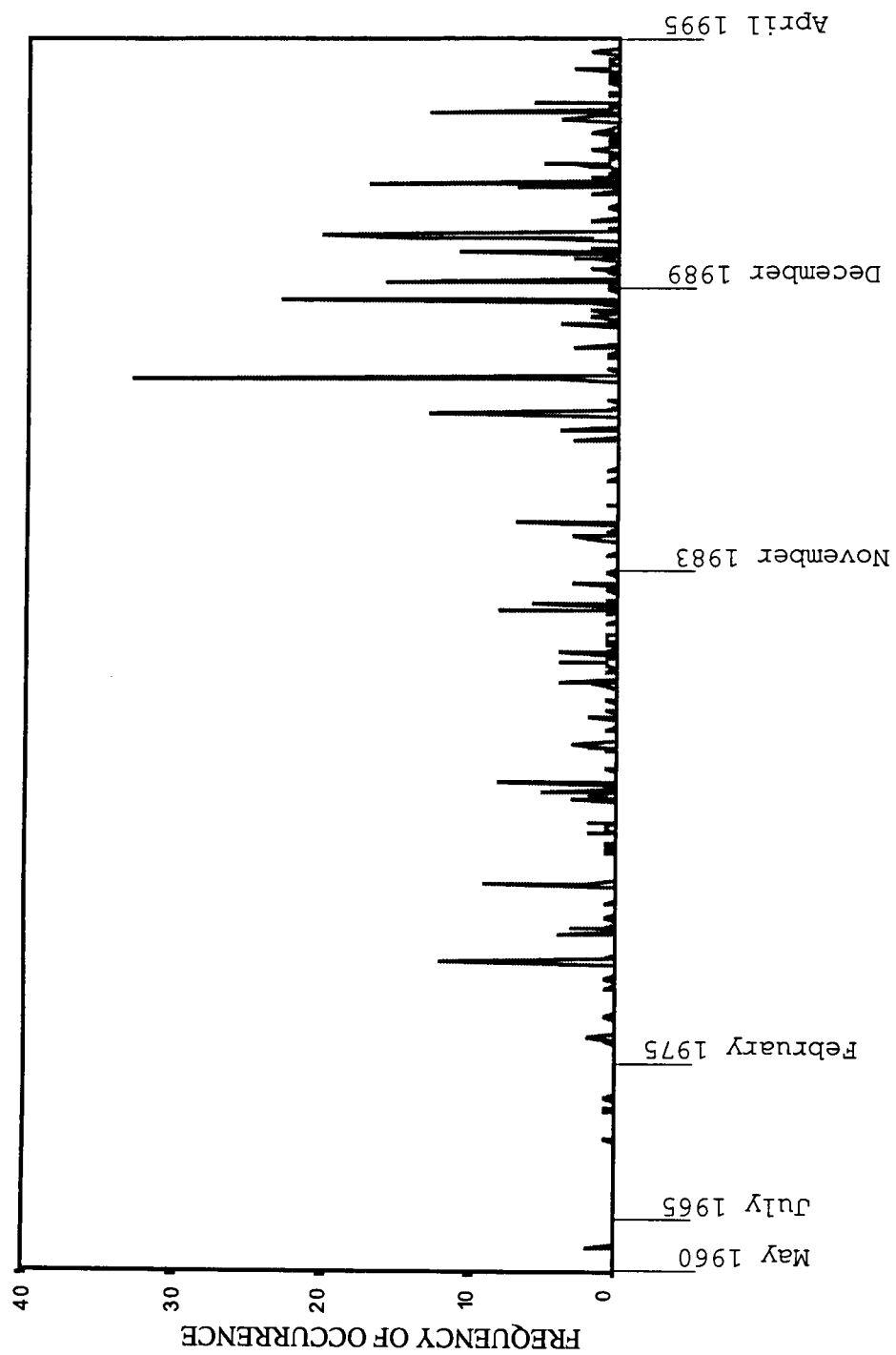


Figure 20
Time Series Plot of PARTNERSHIPS Frame

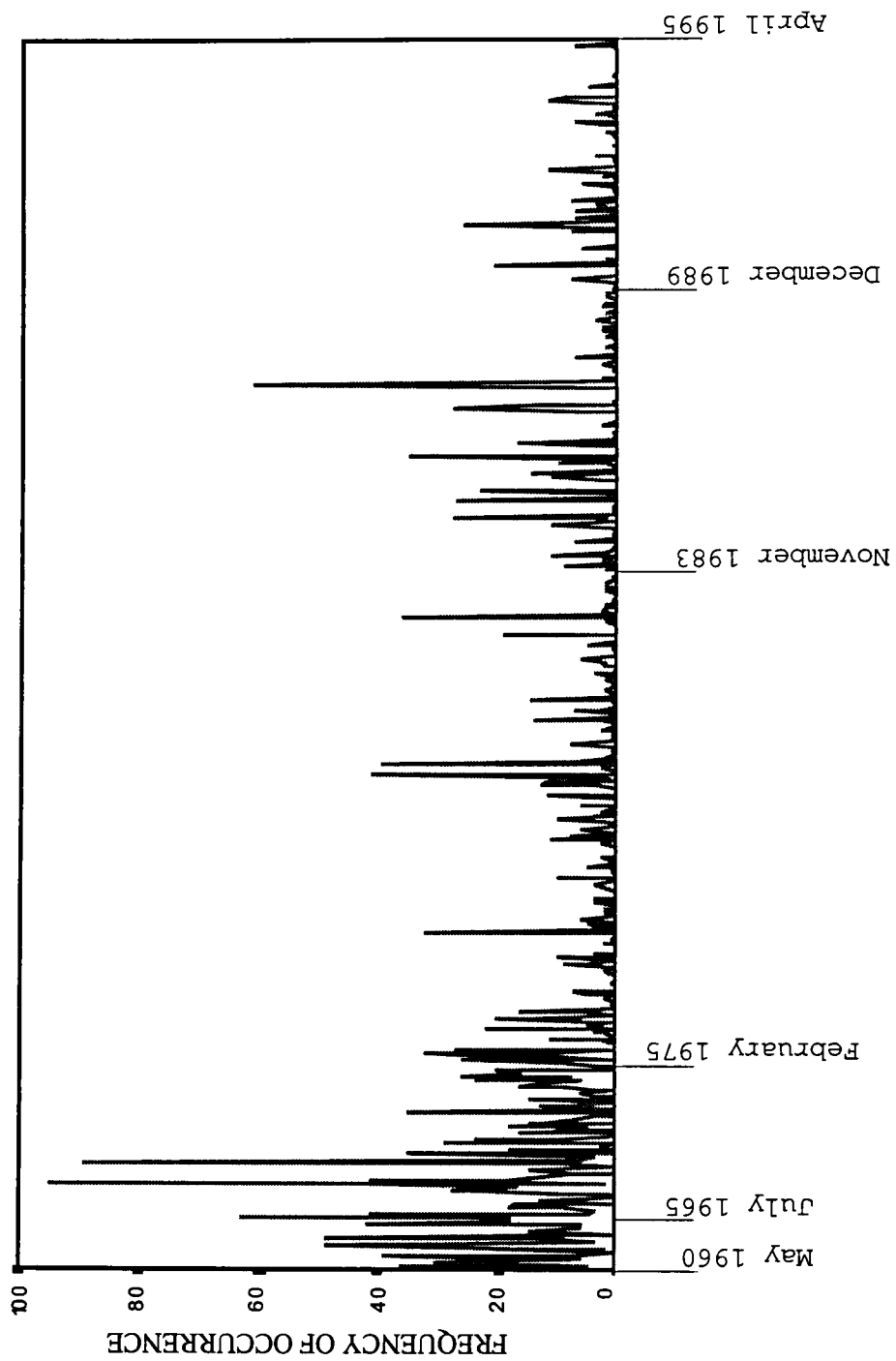


Figure 21
Time Series Plot of REGULATION Frame

Perhaps the most noticeable pattern is evident in the frame REGULATION (Figure 21), which appears with greatest intensity in the earliest periods with periodic spikes occurring in later periods. The FORMAT frame (Figure 10) shows a mild pattern of intensity in the middle section of the cable diffusion time period. The HOMES frame (Figure 8) shows a mild tendency for greater frequency in a broad section of time between 1968 and 1987.

The INVESTMENT frame (Figure 9) displays heightened coverage beginning in mid-1981 through 1987. MEASUREMENT (Figure 17) is a frame with intensity of occurrence appearing to be tri-modal, with more frequent occurrence in the periods 1976 - 1980, 1982 - 1983, and 1985 - 1991. The frame MONOPOLY (Figure 12) appears with some density in the mid-1970s and early to mid-1980s. Finally, the plot of the term PARTNERSHIPS (Figure 20) shows increased occurrence in the most recent years (mid-1990s).

While the visualization provided by these plots is helpful, they can be used at best to encourage the more analytical examination of the potential shift in prominence of terms during the cable-adoption process. The analysis that follows addresses the second proposition posited in this study: Frames in advertising trade press coverage of cable television are expected to shift in correspondence the growing cable television audience. Specifically, some frames are expected to be more prevalent in some time periods than in others. For example, a frame might be found to appear with the greatest

frequency during the second time period (mid-1965 to early 1975); the mean frequency difference in occurrence between the second time period and all others being statistically significant.

While the emergence of 14 frames in the advertising industry's framing of cable television's diffusion serves to answer the first research question, the second research question suggests that these frames will shift as cable diffuses among consumers. The next section outlines the analysis and results corresponding to the exploration of the second research question.

The hierarchical cluster analysis of the 14 frames plus distinct adopter time period code terms serves to identify those frames that co-occur with the time period identifier terms exclusive to the respective five groups. Analysis of variance (ANOVA) can be used on qualifying frames to compare differences in their mean frequencies between time period to assess their respective prominence. Where possible, aggregate frames are formed in the interest of parsimony.

Inserting Adopter Time Period Identifier Terms. The next step in this study relies on the insertion of special code identifier terms into each article according to its appearance in a diffusion of innovation adopter-category period. By including these special code terms into the search file specified for VBMap's multidimensional scaling and cluster analysis, we address the question: What substantive terms occur in the articles from one time period, but not in others?

The mathematical model described earlier for identifying the corresponding time periods for each of the five stages of adoption of cable television is employed here as a logical and empirically-based method of segmenting the diffusion of cable television. Recall that the normal curve distribution and segmentation by adopter period categories is created from the consumer cable subscription data. The specific question addresses which frames correspond to the innovator time period (first coverage to June 1965), early adopters (July 1965 to February 1975), early majority (March 1975 to October 1983), late majority (November 1983 to December 1989) and laggards (January 1990 to April 1995).

The procedures for this analysis follow. A copy of the text file was created and within each article a distinct code identifier term inserted according to the articles' chronological placement in the adopter category schemata described above. The code term XINNOV was inserted in each article from June 14, 1960 to June 7, 1965; all corresponding to the innovators' adopter category. The code term XEADOPT was inserted in articles from July 26, 1965 to February 3, 1975; each corresponding to the early adopter category. The code term XEMAJOR was inserted in articles beginning October 6, 1975 and ending with October 24, 1983; each corresponding to the early majority adopter category. XLMAJOR was inserted into articles appearing from November 7, 1983 through December 11, 1989 corresponding to their appearance during the late majority adopter category. Finally, the code term XLAGG was inserted

into the remaining articles that appear between March 5, 1990 and the April 15, 1995, according to their correspondence with the laggard adopter category.

A new search file was created using WordPerfect 6.0 including the 14 frames and the five adopter category adopter terms: XINNOV, XEADOPT, XEMAJOR, XLMAJOR and XLAGG. The coding procedure in VBPro was employed to generate a numeric data file that identified the frequency of occurrences of the 14 frames and the five identifier terms. The resulting data file contains one row for each of the 718 articles and columns corresponding to the 19 terms in the search file.

Creating the Cluster Analysis Dendrogram Including Time Period Identifier Terms. VBMap was employed to generate term coordinates for hierarchical cluster analysis and frame mapping. A review of the term coordinates demonstrates the expected divergence in first coordinate values between XINNOV (innovator time period, -.35) and the latter three category periods, XEMAJOR (early majority time period, .34) XLMAJOR (late majority time period, .26) and XLAGG (laggard time period, .21). The first coordinate accounted for 40 percent of total variance with coordinates 2 and 3 each accounting for 30 percent.

As demonstrated earlier, the power of hierarchical cluster analysis makes interpretation of the principal component values easier by producing a visual representation of the relationships in a dendrogram. The unstandardized data file was

submitted to SPSS for analysis. Hierarchical cluster analysis was selected with a dendrogram output. The resulting dendrogram appears in Figure 22.

The dendrogram reveals clustering of terms and frames at several levels. The frames HOMES and INVESTMENT are joined with the code identifier terms XEMAJOR and XLMAJOR at the first distance from the origin suggesting high co-occurrence. This early joining with time period identifier terms suggests that the frames HOMES and INVESTMENT may appear with greatest prominence in these time periods. The frame FORMAT joins this initial cluster at the second distance from the origin. Interpreting the dendrogram is the linchpin of hierarchical cluster analysis. Recall that the 25-point scale displayed in the dendrogram preserves the ratio of distances between the variables. Therefore, frames that are joined to each other within the first three distances are interpreted to be significantly similar in their co-occurrence with each other; others are deemed to be much weaker, and therefore, less significant relationships. This criteria is imposed by the researcher. Other studies have been more liberal in determining a cut-off point (e.g., Riechert, 1996, and Miller and Riechert, 1995, use the seventh distance). Where these clusters included time period identifier codes, those frames joined to the code terms are interpreted to correspond to the time periods they represent.

Another tight cluster is formed by an initial cluster where AUDIENCE and ADVERTISING are joined at the first level; this cluster grows by joining with the

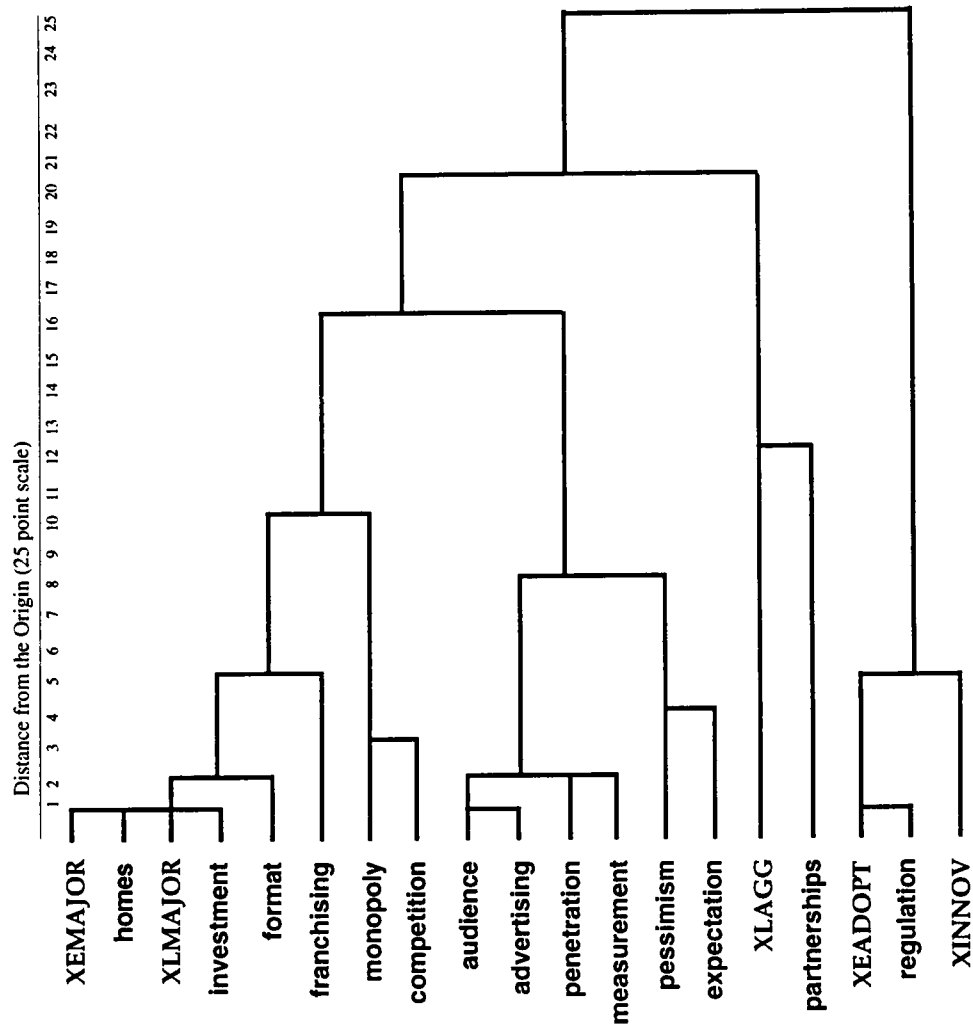


Figure 22. Hierarchical Cluster Analysis Dendrogram of 14 CATV Frames and Five Adopter Period Code Terms

frames PENETRATION and MEASUREMENT at the second distance from the origin. Although the four frames cluster at these early distances, they are not joined to an adopter period identifier term until the 16th distance from the origin. This suggests that they are prominent themes but not representative of particular time periods. More on the interpretation of these clusters in the discussion section of this study.

A third tight cluster is created by the joining of the REGULATION frame with the adopter period term XEADOPT at the first distance from the origin. This small cluster is expanded at the fifth distance where the adopter term XINNOV is joined to the initial two. Note that these three terms are not joined to any other term or frame until the final, or 25th, distance from the origin. This is interpreted to suggest that REGULATION is a frame that co-occurs significantly with the earliest two time periods and not with the others.

None of the remaining frames in the dendrogram are joined with other frames or adopter period terms until the third or greater distance. The FRANCHISING frame is not joined with another group until the fifth distance, where it is joined with the combined XEMAJOR and XLMAJOR time periods. Moving increasing further from this group, the MONOPOLY and COMPETITION frames join the XEMAJOR and XLMAJOR category cluster at the 10th distance. The frames PESSIMISM and EXPECTATION join but not until the fourth distance. The PARTNERSHIPS frame is the only one joined directly to the XLAGG period term, but this cluster is not formed

until the 12th distance, suggesting that the co-occurring relationship is very weak, but worth further investigation.

Creating a Frame Map Including Adopter Period Terms. The coordinate values of each of these 14 frames were used to create a multidimensional frame map as shown in Figure 23. The three dimensional coordinate values for each of the category groups or clusters are shown in Table 7.

The frame map was created as before by a carefully drawing a scaled graph using Aldus PageMaker. The frame map shown in Figure 23 represents the 86 selected terms of interest into an interpretable visual representation of the data structure now represented by 14 frames and the five adopter period identification terms.

Most notably we see the distance separating the REGULATION frame from the MEASUREMENT frame with extremely divergent coordinate values of (-.27, .64 and -.01) and (.63, -.06, and -.35), respectively. On the other hand, the map shows that the frames for AUDIENCE (.56, .13, -.08), MEASUREMENT (.63, -.06 and -.35) and ADVERTISING (.42, .21, .06) occur with relative similarity. This finding supports the relationship demonstrated in the dendrogram.

In the multidimensional map, frames with a positive first coordinate (or first dimension) appear as white headed pins as if stuck into a thin corkboard suspended in space. Those frames with a negative first coordinate (or first dimension) appear as black headed pins. The five adopter period identifier terms appear with black diamond

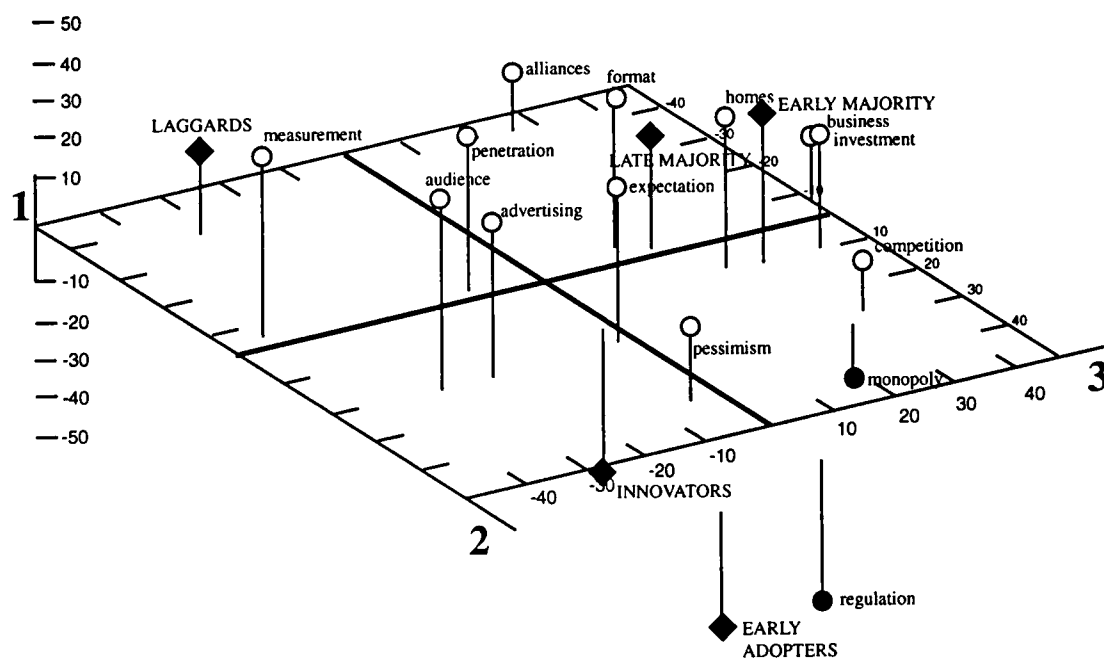


Figure 23.
Frame Map from Multidimensional Scaling of 14 Frames and 5 Time Period Codes.

Table 7
Map Coordinates for Five Adopter Period Identifier Terms
and 14 Cable Television Frames.

Frame	Coordinate 1	Coordinate 2	Coordinate 3
XINNOV	-0.352	0.109	-0.021
XEADOPT	-0.271	0.525	-0.188
XEMAJOR	0.338	0.086	0.291
XLMAJOR	0.261	-0.011	0.170
XLAGG	0.206	-0.353	-0.304
regulation	-0.328	0.584	0.016
monopoly	-0.103	0.273	0.285
competition	0.103	0.256	0.274
pessimism	0.179	0.396	-0.062
expectation	0.373	0.221	-0.005
investment	0.285	0.088	0.367
homes	0.371	0.080	0.219
partnerships	0.124	-0.452	0.265
franchising	0.143	-0.036	0.498
format	0.394	-0.053	0.127
audience	0.456	0.113	-0.383
penetration	0.378	-0.008	-0.166
advertising	0.380	0.211	-0.255
measurement	0.434	-0.053	-0.455

shaped heads. An examination of the multidimensional map illustrates the relative closeness of the frames HOMES (.37, .08, .22), INVESTMENT (.28, .09, .37) and FORMAT (.39, -.05, .13) with the adopter period identifier terms XEMAJOR (.34, .09, .29) and XLMAJOR (.26, -.01, .17). Also nearby, but with is slightly weaker co-occurrence, is the frame FRANCHISING (.14, -.04, .50).

The frames MONOPOLY (-.33, .58, .02), COMPETITION (.10, .26, .27), PESSIMISM (.18, .40, -.06), PARTNERSHIPS (.12, -.45, .27) and EXPECTATION (.37, .22, -.01) do not appear in close proximity to any other frame or adopter period identifier term.

The frames AUDIENCE (.46, .11, -.38) and ADVERTISING (.38, .21, -.26) appear in multidimensional space to hover closely together. Nearby are PENETRATION (.38, .21, -.26) and MEASUREMENT (.43, -.05, -.46). None of these frames is shown to be relatively near any space occupied by a time period identifier term.

Those frames that do not join others at the first or second level in the dendrogram, and which also showed no proximity to other frames, were removed from further analysis. An exception was the frame PARTNERSHIPS, which was retained because of its singular connection to the XLAGG adopter period term. This interpretation is consistent with the standards applied in earlier analysis.

The second research question proposed that distinct frames would emerge and would correspond to stages in the diffusion of cable television. This analysis suggests that there are some frames corresponding to particular time periods as evidenced by clusters formed around the respective time-period identifier codes. Additional testing would add greater credence to this finding, particularly a test that could demonstrate a frame's prominence as being different from other periods at the .05 level of statistical significance. This test is applied in the next section.

Analysis of Variance. Analysis of variance (ANOVA) is a statistical model used for testing research hypotheses that involve two or more population means and tests of differences between their sample means. The research hypothesis for comparing the means among five groups would be: $m_1 \neq m_2 \neq m_3 \neq m_4 \neq m_5$; that is, the means of each group are not equal. ANOVA reports a test of the null hypothesis, that is, that the means of each of the five groups (or in this case, the mean of a frame within each adopter time period) is equal: $m_1 = m_2 = m_3 = m_4 = m_5$.

ANOVA compares observed variation within each time period with the variation between each time period. The mean squares for between and within time periods generate the numerator and denominator, respectively, in the statistical F-ratio or F-value. The F-value determines the statistical significance of the test. The greater the variation between groups, the lower the probability that the means represent the same groups.

It is not enough for our purposes to know whether or not means representing the groups differ. Post hoc statistical tests are needed to make multiple comparisons of group means to determine which means are different from others at some specified statistically significant level. These post hoc tests include Tukey's, Bonferroni's, least significant difference, and the Scheffe test. This last test is used in the current study to identify which frames' means differ among the five time periods. Scheffe's test was selected because it is considered the most conservative option.

Recall that output from the coding procedure of the articles using the 19-term search file produces a 718 row x 20 column matrix. The first column represents the article case number and then 19 additional columns, one each for the 14 frames and 5 adopter category period identifiers. Each row contains the frequency count for the appearance of a frame term in the respective articles.

Although seemingly convenient, submitting all 14 frames to ANOVA, is not an appropriate use of the statistical model. As the number of comparisons made between each group's mean frequency increases, so too does the probability of getting a false reading. For example, the comparison of all means between five groups requires 10 different comparisons. The probability that at least one of the 10 comparisons being made will be accepted as true (observed significance level of less than .05) is 29 percent. The more comparisons you make, the more likely it is that you'll find one or

more pairs to be statistically different, even if all means are equal in the population (Norusis, 1991, p. 297).

Two objective criteria and a final aggregation served to identify meaningful frames for ANOVA. Frames must (1) demonstrate stability throughout the hierarchical cluster analysis and frame mapping procedures and (2) co-occur with adopter code identifier codes. A third step completes the screening process: When possible, frames were once again combined under the conditions that their substantive themes were not compromised.

The method for demonstrating the second and third criteria have been discussed and applied at great length throughout this study. The first criterion, frame stability, can be assessed by comparing the first 14-frame dendrogram and its frame map (Figures 6 and 7) with the 19-term (14 frames plus 5 identifier codes) dendrogram and its map (Figures 22 and 23).

Stability of the clusters is demonstrated by the limited movement of clusters under the two conditions under which the 14 frames were subjected to hierarchical cluster analysis. The second condition differed from the first by the addition of the five adopter time period identifier codes. It would be expected that only the weaker (unstable) clusters would be subject to the inertia created by adding five terms which by design do not co-occur. Riechert (1996) experienced some minor shifts in clusters when adding two identifier terms. It is expected then that five identifier terms would

cause even greater shift in the clusters, but should not result in a complete scrambling of the frames. The addition of five identifier terms should be considered a test of the clusters' stability given the number and density of each adopter-period time code.

Comparing dendrograms demonstrates relative consistency between the frame clusters with a few shifts occurring in what can be considered weaker frames. The clusters formed by the frames HOMES, INVESTMENT and FORMAT remain stable with the addition of five time period identifier codes. The three frames are joined in the first dendrogram at the fourth distance from the origin and remain a single cluster until the eighth level where they are joined to PESSIMISM and EXPECTATION. This pattern is identical to that demonstrated in the second dendrogram. Note that the multidimensional spaces occupied by these terms in the frame map remain relatively constant as well. Again, some shift is expected since 19 terms would occupy different space than would 14 terms.

FRANCHISING and PARTNERSHIPS are frames that join this growing cluster at about the same distances under both conditions. FRANCHISING joins the stronger HOMES, INVESTMENT and FORMAT cluster at the 7th and 5th levels, respectively. PARTNERSHIPS shows subtle movement, being joined to the growing cluster group under both conditions at the 17th and 20th levels, respectively.

A second stable frame group is observed by the grouping of AUDIENCE, ADVERTISING, PENETRATION and MEASUREMENT. This four-frame group is

joined at or prior to the fourth distance in the first dendrogram and at the second distance after the addition of the five time-period identifier terms.

A third relatively stable frame is REGULATION, which remains distinct and does not join any other frame until the very last (25th) distance under both conditions (without and with the insertion of time-period codes). MONOPOLY, on the other hand, demonstrates rather dramatic movement after the addition of the five identifier codes. The MONOPOLY frame appears subject to the gravitational pull of the identifier terms, moving from its early alliance with REGULATION, which is consistent logically in the substantive content of the frames, to its subsequent grouping with the COMPETITION frame, a substantive cousin with arguably similar themes. And it is the COMPETITION frame which shows the greatest instability having completely flip-flopped its positions in the dendrograms and frame maps. This movement is particularly dramatic in the frame map comparison (see Figures 7 and 23).

This shift reveals weaker correspondence between a frame and a time period. This phenomenon is observed in the movement displayed by the frames MONOPOLY and COMPETITION. Thus, the two are considered the weakest of the 14 frames revealed by hierarchical cluster analysis and frame mapping in this study.

Based on a test of frame stability, most of the frames remain as candidates for further analysis. Analysis of the 19-term dendrogram (14 frames plus 5 identifier terms) provides additional guidance.

REGULATION emerges as the first frame of interest, located in the cluster created by the adopter time period codes XEADOPT (1965 - 1975) and XINNOV (1947 - 1965). This cluster, formed initially by REGULATION and XEADOPT at the first distance from the origin (see Figure 22) and then joined by XINNOV at the sixth distance, indicates that legal issues with cable television are the first to emerge in the advertising industry's framing of the diffusion of a new medium. In the case of cable television, the regulatory issues were key given the proposed threat posed by cable to the established and powerful network television industry. These regulatory issues also reflect the federal government's adjustment to new market conditions and attempts to control the growth of television. It is recalled that the emergence of cable television initially conflicted with the government's desire to bolster the development of UHF channels.

The REGULATION frame and its companion adopter time period identifier terms remain isolated and do not join any other frame until the last (25th) possible distance from the origin. The strength of this cluster suggests that the REGULATION frame is indeed representative of the earliest two adopter time periods and should be submitted to ANOVA for confirmation.

The second frame of interest is formed by the three frames of HOMES, INVESTMENT and FORMAT, joined at the first level by both XEMAJOR (1975 - 1983) and XLMAJOR (1983 - 1989). Note that the frames HOMES, INVESTMENT

and FORMAT demonstrate stability during the Frame Mapping procedures. The substantive meaning of the key component terms is interpreted to be consistent with themes and issues related to the delivery of cable television services to subscribers. The three frames are combined to create the aggregate frame: DELIVERY.

The close association between this new aggregate frame and the two adopter period identifier terms suggests that DELIVERY may indeed be a prominent and distinctive frame to identify the mid-section of the diffusion time span and should be submitted to ANOVA for confirmation.

PARTNERSHIPS is a frame worth closer examination chiefly because it is the only frame to join with XLAGG (the laggard period). This cluster does not form until the 11th distance from the origin, however, it remains isolated until the 20th distance. This association suggests that PARTNERSHIPS may be a prominent and distinctive frame to identify the final period in the diffusion time span.

The demonstrated thematic similarities and the consistently stable frame mapping of the ADVERTISING, MEASUREMENT, PENETRATION and FORMAT frames (see Figures 6, 7, 22 and 23) discussed earlier suggest that an aggregate frame is appropriate. The four are combined into a larger cluster with the frame label: ADVERTISING.

The new ADVERTISING frame does not join with any adopter time period term until the 16th distance from the origin. It is thus interpreted that despite the

strength of the frame, it does not co-occur to any degree that it can be associated with an adopter time period.

The remaining frames, FRANCHISING, MONOPOLY, COMPETITION, PESSIMISM, and EXPECTATION failed to join to any adopter period identifier term and for reason of demonstrated instability were not deemed meaningful to investigating the prominence of frames within adopter category time periods.

The steps described above served to identify three frames for submission to ANOVA to test whether these frames appear prominently among the five adopter time period groups: REGULATION, DELIVERY and PARTNERSHIPS.

ANOVA analysis demonstrates that the REGULATION frame is most prominent in the first two time periods and that their frequency of occurrence is significantly different at the .05 level of statistical testing. Figure 24 and Table 8 show the mean frequency distribution and the ANOVA results among the five time periods, respectively.

REGULATION's mean frequency of occurrence per article during the innovators time period is 18.38, followed by a mean frequency of 12.6 during the early adopter time period. These two groups are significantly different from other groups ($F\text{-ratio} = 46.31, p \leq .0001$), but not from each other. The mean occurrence of the REGULATION frame for the early majority, late majority and laggard time periods is 2.70, 2.58 and 1.36, respectively. Therefore, it appears that REGULATION is a frame

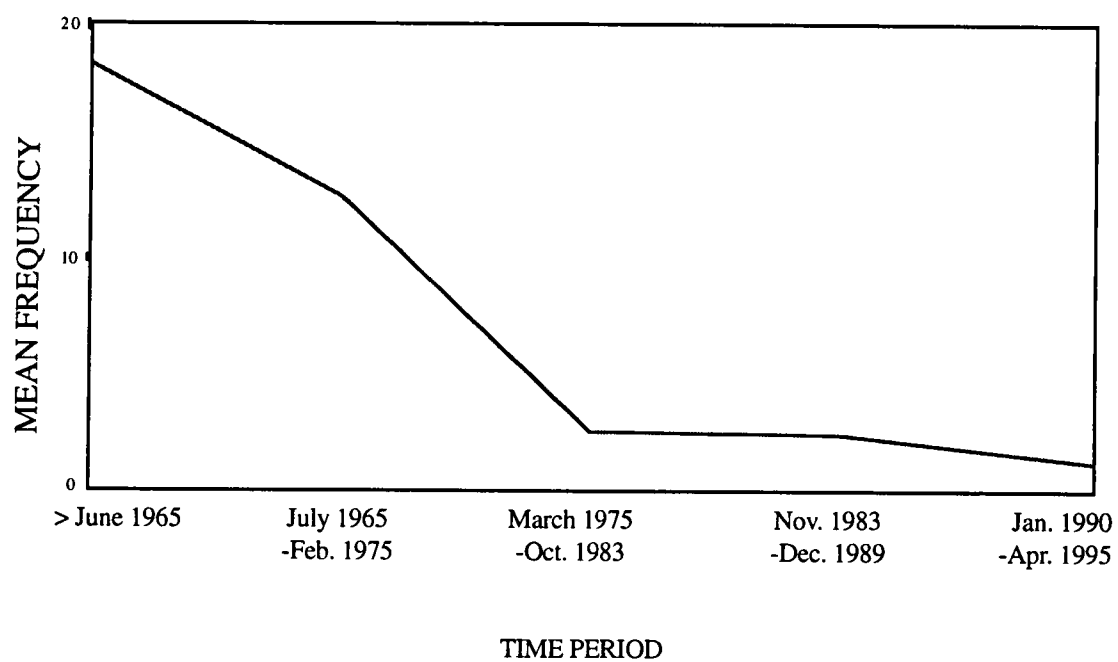


Figure 24
Mean Frequency of Occurrence for REGULATION Frame

Table 8
Analysis of Variance (Comparison of Means) for REGULATION Frame

Time Period	Mean	*
Innovators	18.38	a
Early Adopters	12.60	a
Early Majority	2.70	b
Late Majority	2.58	b
Laggards	1.36	b
F-Ratio: 46.311	F-Prob: .0000	DF: 4
*Means with different letters are significantly different at the .0001 level.		

that corresponds to the first two time periods; that is, REGULATION is the first frame emerging from the advertising trade press' coverage of cable television.

ANOVA reveals that the DELIVERY frame is most prominent in the middle two time periods and that their frequency of occurrence is significantly different at the .05 level of statistical testing. Figure 25 and Table 9 show the mean frequency distribution and ANOVA results among the five time periods, respectively.

DELIVERY's mean frequency of occurrence per article during the early majority time period is 13.13 followed by a mean frequency of 14.32 during the late majority time period. These two groups are significantly different from other groups ($F\text{-ratio} = 29.80, p \leq .0001$), but not from each other. The mean occurrence of the DELIVERY frame for the innovator, early adopter and laggard time periods is 5.24, 6.51 and 8.34, respectively. It makes intuitive sense that the frame during the greatest period of consumer adoption would focus on the hardware and production necessary to deliver cable services to subscribers.

ANOVA reveals that the PARTNERSHIPS frame is prominent in the laggard time period and its frequency of occurrence is significantly different from the second and third time periods at the .05 level of statistical testing. Figure 26 and Table 10 show the mean frequency distribution and the ANOVA results among the five time periods, respectively.

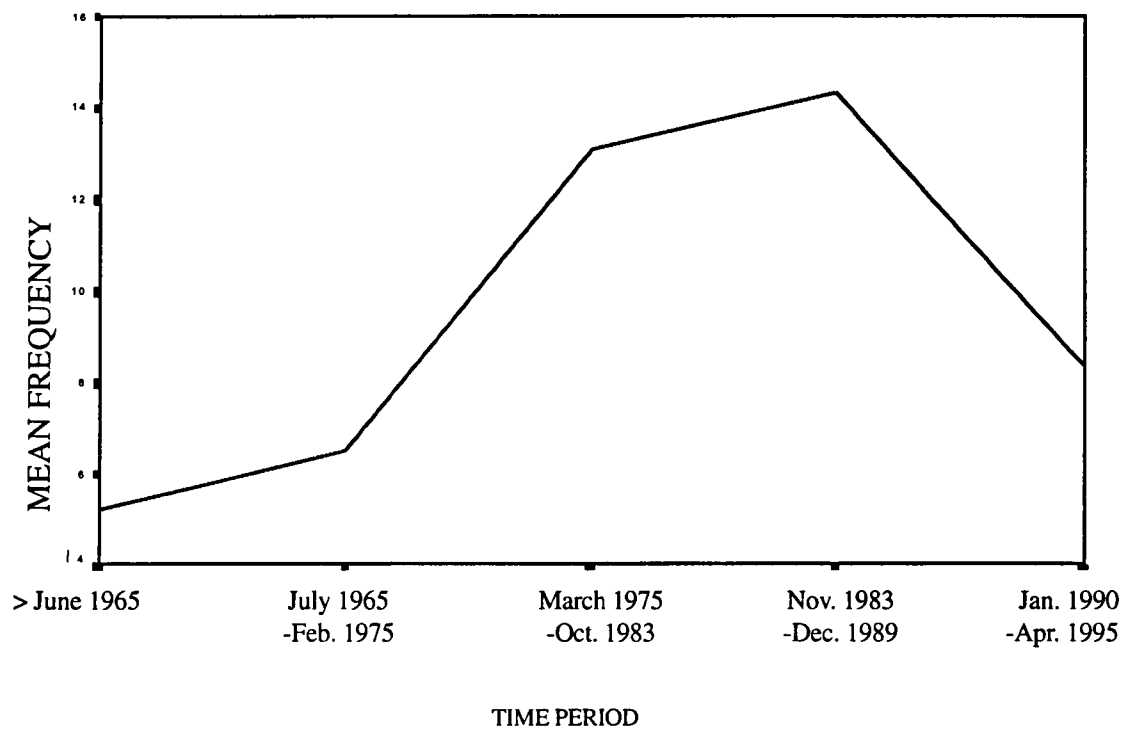


Figure 25
Mean Frequency of Occurrence for DELIVERY Frame

Table 9
Analysis of Variance (Comparison of Means) for DELIVERY Frame

Time Period	Mean	*
Innovators	5.24	a
Early Adopters	6.51	a
Early Majority	13.13	b
Late Majority	14.32	b
Laggards	8.34	a
F-Ratio: 21.798	F-Prob: .0000	DF: 4
*Means with different letters are significantly different at the .0001 level.		

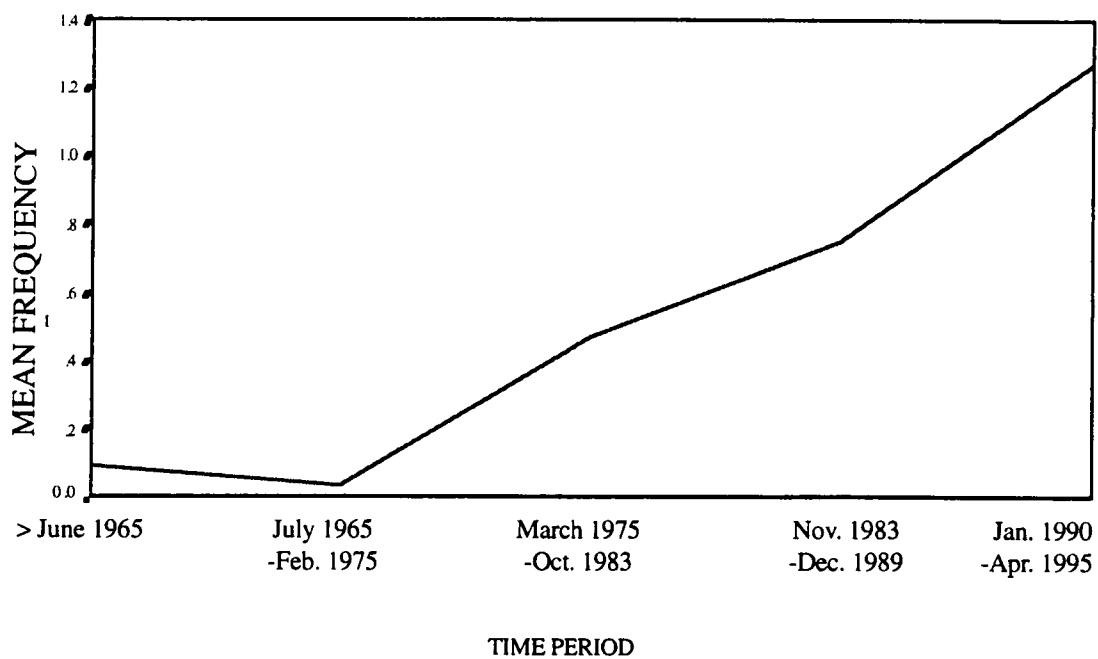


Figure 26
Mean Frequency of Occurrence for PARTNERSHIPS Frame

Table 10
Analysis of Variance (Comparison of Means) for PARTNERSHIPS Frame

Time Period	Mean	*
Innovators	.095	a
Early Adopters	.039	a
Early Majority	.475	a
Late Majority	.755	a
Laggards	1.28	c
F-Ratio: 5.272	F-Prob: .0003	DF: 4

*Means with different letters are significantly different at the .001 level.

Frame Purity Index. Despite the rigor and usefulness of the Frame Mapping method to identify frames in cable television articles, greater understanding can be supplemented by examining these frames in context. To identify those articles that best represent the appearance of the respective frames, a frame purity index (Riechert, 1996) was created by ranking the articles according to the adjusted prominence of each frame.

In this study, the frame purity index for each article is calculated by subtracting from the target frame's (e.g., DELIVERY) frequency of occurrence the respective frequency counts for the remaining frames. Because the ADVERTISING frame proved to be such a prominent and stable frame, it was used in the purity frame index calculation to maximize the representativeness of the respective articles for REGULATION and DELIVERY.

Table 11 provides the purity index calculations for the articles demonstrating the most exemplary cases for the REGULATION frame. Table 12 displays the first two paragraphs for each of the 10 exemplar articles. The entire articles are included in Appendix B.

For example, a July 1, 1968, article reports new "copyright legislation, with CATV provisions deleted, passed by the House during this Congress, but [it] is blocked in the Senate judiciary subcommittee on patents, trademarks and copyrights." A February 21, 1966 article's discussion of recent CATV activity focuses on issues such as the FCC having "asserted control only over CATV systems which use

Table 11
REGULATION Frame Purity Index

Article	REGULATION Index	REGULATION Frequency	DELIVERY Frequency	ALLIANCE Frequency
7/1/68	86	95	9	0
2/21/66	59	63	4	0
12/5/85	50	61	11	0
4/26/65	45	49	4	0
8/5/68	37	41	4	0
5/3/65	37	46	7	2
12/24/84	35	35	0	0
3/28/66	35	41	6	0
6/17/68	35	43	8	0
11/3/69	31	35	4	0

Table 12
Purity Index Articles' Titles and Lead Paragraphs for REGULATION Frame

Rank	Date	Vol.	Page	Headline	First Two Paragraphs
(1)	7/1/68	39	30	High Court Copyright Ruling Helps CATV Stance Vis-a-Vis Broadcasters FCC; Congress May Act but No Speedy Moves Are Foreseen.	The Supreme Court made it clear last week that owners of TV programming won't be protected from CATV activities unless action is taken by the FCC or Congress. In a 5-1 decision, the Supreme Court reversed a lower court and ruled that CATV systems are not required to pay copyright royalties for the programming they relay to subscribers. The decision did not extend to programming which might be initiated by CATV systems.
(2)	2/21/66	37	1B	New FCC Policy Hits CATV Growth in Cities, Aids It in Rural Areas Commission Asserts Full Jurisdiction; Seeks Congress Rule.	The FCC today moved to resolve the CATV dilemma with a plan which seeks to curb CATV in big cities and enlarge its role in small towns and rural areas. CATVs carrying out-of-town stations would be blocked out of the top 100 markets unless owners can show on a case-by-case basis that left unresolved.
(3)	12/5/85	56	24	Sparks Fly After Must Carry Ruling.	It's a tenuous peace, marked by intense competition but little overt violence. That could describe the relations between some foreign countries, and it equally applies to the relationship between broadcast and cable tv.
(4)	4/26/65	36	1	New FCC Rule Protects Stations; Restricts CATVs; Commission Says It Hopes Congress Will Help Out With New Law.	The FCC announced a series of steps today which are designed to protect TV stations from CATV competition. The full scope of the commission's program still depends on a number of factors, including congressional reaction. But as a minimum, it includes a plan to require that all CATV systems carry the local TV stations, and black out programs which duplicate those offered by the local stations.

Table 12 (continued)

Rank	Date	Vol.	Page	Headline	First Two Paragraphs
(5)	8/5/68	39	50	CATV Ruling Affects Rival Ad Attacks.	In a decision that astonished almost all of the experts and it is said, surprised even the winning party, the U.S. Supreme Court has reversed two lower federal courts and ruled that CATV systems do not "perform" copyrighted program material that they pick up from regular television broadcasts and therefore they are not infringers. Putting it another way, the CATV systems can transmit to their subscribers by wire, television programs that include, for example, copyrighted feature motion pictures without the consent of the copyright proprietor and without payment for the privilege. The Supreme Court came to this conclusion by comparing the relative roles of the broadcaster and the viewer in what it called "the total television process." Considering CATV systems in this framework, the Supreme Court majority decided that they are a part of the viewing function rather than a part of the broadcasting function. In Justice Stewart's words, "Essentially, a CATV system no more than enhances the viewer's capacity to receive the broadcaster's signals: it provides a well-located antenna with an efficient connection to the viewer's television set."
(6)	5/3/65	36	70	Broadcasters Oppose FCC Interface in Programming; Like CATV Rule.	Politics makes strange bedfellows, and so does self interest. That may be the inescapable moral in the tangled alliances that have developed from recent action by the FCC dealing with network control of TV programs and with CATV competition with broadcasters.
(7)	12/24/84	55	13	Turner Zooms in on Camera-Courtroom Fight.	With U.S. Supreme Court Justice Warren Burger adamantly opposed to cameras in federal courtrooms, Ted Turner is unlikely to convince federal judges to follow their state counterparts in allowing cameras. Nevertheless in characteristic fashion, the entrepreneur, who has established a reputation for battling strong odds, has dispatched his

Table 12 (continued)

Rank	Date	Vol.	Page	Headline	First Two Paragraphs
(8)	3/28/66	37	3	Bartley Hits FCC Control of CATV in House Hearing Protection Begets More Regulation, He Warns; Henry Defends Policy.	lawyers to ask the Supreme Court to overturn the second circuit court's decision barring Cable News Network from covering retired Gen. William Westmoreland's \$120 million libel suit against CBS Inc., Mike Wallace et al. A dissenting member of the Federal Communications Commission today warned Congress of a "Quagmire" of regulation and litigation if the commission goes ahead with its plan to assert control over community antenna TV systems. Commissioner Robert Bartley told the House commerce committee the CATV rules promulgated by FCC last month to keep CATV out of the top 100 markets "look to the economic protection of television stations, rather than looking to the public's freedom of choice."
(9)	6/17/68	39	2	High Court Affirms FCC's Jurisdiction Over CATV Systems	Efforts of the FCC to protect broadcasting from competition were upheld by the Supreme Court this week, when it ruled that FCC has the power to regulate CATV under present law. The Supreme Court ruled that FCC has authority to stop the expansion of a CATV system into a new area until a hearing is conducted to determine whether the CATV expansion would hurt regular broadcasting in the area.
(10)	11/3/69	40	3	CATV Leaders Show Mixed Reaction to FCC Program, Advertising Rule	The cable television industry appeared to have a bittersweet reaction this week to a Federal communication commission decision to require larger CATV systems to originate programming and allow them to carry advertising to help cover the cost AA, Oct. 27 Industry officials suggest that the new FCC rule imposes a new restriction on CATV, while not lifting old ones. They remain bitter over what they consider to be a freeze imposed on the industry last...

microwave facilities to relay programs from distant cities...[under] the new plan all systems will be regulated except systems with less than 50 customers, and those serving only as apartment house master antennas.”

The DELIVERY frame can be seen in a March 8, 1982, article that reports how distributors “are beginning to write contracts for any given syndicated movie, movie package or even off-network series to expire the same day or at least before a given day in all markets simultaneously. After this date, such products may be sold to pay tv because syndication contracts guaranteeing exclusivity have ended.” A November 15, 1982, reveals a typical issue in the DELIVERY frame of the infrastructure necessary to build future subscriber growth:

In a short time most of the remaining franchises will be awarded and several billion dollars worth of construction will push the subscriber number to more than 40% of television households. Also important to cable interests programmers and advertisers are the other 30,000,000 households - the potential subscribers with direct access to cable if they can be enticed to hook up to it. By 1985 the cable industry should have exposure to 80% of the population.

Table 13 provides the purity index calculations for the articles demonstrating the most exemplary cases for the DELIVERY frame. Table 14 displays the first two paragraphs for each of the 10 exemplar articles. The entire articles are included in Appendix B. A useful purity index frame could not be calculated for the PARTNERSHIPS frame using the formula described above because the frequency

Table 13
DELIVERY Frame Purity Index

Article	DELIVERY Index	DELIVERY Frequency	REGULATION Frequency	ALLIANCE Frequency
3/8/82	66	66	0	0
11/15/82	50	53	2	1
3/14/83	50	56	5	1
11/16/81	49	49	0	0
10/19/81	48	48	0	0
12/5/85	45	45	0	0
5/7/84	44	44	0	0
12/01/86	43	43	0	0
5/30/85	40	40	0	0
11/2/70	40	51	10	1

Table 14
Purity Index Articles' Titles and Lead Paragraphs for DELIVERY Frame

Rank	Date	Vol.	Page	Headline	First Two Paragraphs
(1)	3/8/82	53	S2M1	Pay TV Goes on the Prowl to Seek Old Movies.	First it vied for tv viewers, new pay tv is prowling the once uncontested domain of tv stations--the syndication program marketplace. What pay tv is seeking is older movies and movie packages to fill schedule gaps created when pay tv extended its operating hours.
(2)	11/15/82	53	52	CATV Operators Churning Over Disconnects.	Finding that viewers would eagerly buy as many as four pay tv services cable operators across the U.S. last year scrambled to add new networks to their systems. But many are panicking, now that a number of those same viewers are disconnecting some or all of the services they bought. "One out of every four consumers who subscribe to more than one pay service disconnects everything each year, and almost all who buy three or four services disconnect one or more of the channels they've purchased," said Charles Townsend, vp marketing for United Cable. "It's incredible. Can you imagine if that many loyal Heinz ketchup users stopped using that brand every year? It's very, very bad news."
(3)	3/14/83	54	2M12	Interference at the Movies?	Even though local television station profits continue to be among the strongest of any industry -- with record prices being paid for stations, attesting to the ongoing prosperity of local broadcasting -- the future picture is filled with potential interference and uncertainty. Stations, especially independents, are worried that the primary sources of programming -- their lifeblood -- are in jeopardy. The networks' push to repeal the FCC's financial interest rule threatens to curtail local stations' current access to valuable off-network programming.
(4)	11/16/81	52	S2	From Static to Success: A History	From its humble origins in the 1940s to today's 22 million subscribers cable television is finally in the ballpark of the 30%

Table 14 (continued)

Rank	Date	Vol.	Page	Headline	Lead Paragraph
					penetration figure that is the sine qua non for success in traditional television. In a short time most of the remaining franchises will be awarded and several billion dollars worth of construction will push the subscriber number to more than 40% of television households. Also important to cable interests programmers and advertisers are the other 30,000,000 households - the potential subscribers with direct access to cable if they can be enticed to hook up to it. By 1985 the cable industry should have exposure to 80% of the population.
(5)	10/19/81	52	76	Suppliers Battle for Cable; Meet Buyers.	Several "battles of New Orleans" were fought at the first National Cable Television Association/Cable Television Administration & Marketing Society software convention, and their weapons included sales spiels, ads in catv trade publications and promotional literature handed out at the exhibit booths. The movie, sports, music, children's and old tv series categories were among the most numerous at the exposition's 100 booths.
(6)	12/5/85	56	20	Program Guides Fail to Turn on Advertisers.	It sounds like the answer to an advertiser's prayers--a medium that reaches select, upscale consumers who zap commercials, watch movies on videocassette recorders or tune in commercial free tv. And the medium maintains its ad message in these prime households 30 days or more.
(7)	5/7/84	55	64	TBS Easing Sting of Rate Increases.	The Turner Broadcasting System is giving a reprieve to some cable-system operators carrying its Cable News Network or its CNN Headline News that had been bracing for a penalizing rate increase this summer. In some cases, the revised rate structure will mean those cable operators will incur only half the rate increase they had expected.

Table 14 (continued)

Rank	Date	Vol.	Page	Headline	Lead Paragraph
(8)	12/1/86	57	S1	Profit Picture Sends Operators a Clear Signal.	Cable tv enters a new age at the turn of the new year as the pricing of basic cable services is deregulated. This means that rates charged for basic services by cable operators that experience competition from over-the-air broadcasters no longer will be regulated by the government.
(9)	5/30/85	56	24	Videocassette Recorders in Operators' Arsenals.	To remain competitive with the growing array of home electronic equipment, cable TV operators are developing technical strategies designed to strengthen the compatibility between their product and home entertainment centers, especially videocassette recorders. A number of cable operators also are finding that marketing compatibility is increasing their sales.
(10)	11/2/70	41	98	CATV Looks Lie a Lusty Infant Heading into Fast Growth Era.	Community antenna TV born to provide good video reception for people who couldn't otherwise get it, will by next spring have taken its first major steps into the programming and advertising spheres. Now that advertising on CATV alias cable TV, has FCC approval during natural breaks in programming the cable men say specialization will be the name of their game. They agree that ad prices on the community -targeted medium will be below local radio and TV prices.

levels for the frame are so low compared to those of REGULATION and DELIVERY.

The calculations result in high negative values. To identify articles representing the PARTNERSHIPS frame, articles with the highest gross frequency of occurrence for the frame were selected as reported in the frequency ranking procedure described in an earlier section. Excerpts were provided in an earlier discussion, and are supplemented with the samples below:

April 10, 1989. Headline: Pay-Per-View Reserves Front-Row Seat In Programming Game; Once Heralded In '85 As Cable's Ace In The Hole, PPV Needed Better Technology And Is Finally Making In-Roads:....PPV insiders refer to the recent deal between NBC and Cablevision to place an unspecified number of hours of the 1992 Summer Olympic events on PPV as a harbinger of future growth.

Other recent PPV programming leaps include a mega-concert featuring Frank Sinatra, Liza Minelli and Sammy Davis Jr.; expanded sports coverage, including auto racing and baseball in San Diego; a new deal between Request Television and DIR Broadcasting to produce and distribute a monthly series of rock concerts -- the first regularly scheduled PPV network series.

April 6, 1992. Headline: NBC girds for Olympic PPV: Oh, the agony of the feat; Critics kicking over how TripleCast is marketed:

The biggest challenge of the 1992 Summer Olympics won't take place on the track-and-field courses or in the swimming pools of Barcelona.

It will occur on Manhattan's Sixth Avenue, where executives of NBC and its cable partner Cablevision are coordinating an unprecedented marketing effort.

June 14, 1993. Headline: Cable Leads Interactive TV Surge.

Cable TV, telephone and computer companies are scrambling to choose sides in the looming battle for dominance in the age of interactive TV.

Cable companies have emerged at the forefront of the new media revolution, but the phone companies are coming on strong. Now, a spate of planned or announced alliances is threatening to blur industry lines even further.

Cable TV and phone companies are competing to build interactive electronic superhighways that will deliver movies on demand, home shopping, video phones and hundreds of other services directly to the home. And scores of technology companies are grabbing for their share of the billions of dollars that will be spent to build and upgrade the systems.

Summary of Results.

Exploratory investigation using hierarchical cluster analysis identified 14 different frames emerging from advertising trade press coverage of cable television. These clusters are revealed in the cluster analysis dendrogram in Figures 6 and 7. Three frames emerged from hierarchical cluster analysis and multidimensional scaling as corresponding to particular time periods in the diffusion process to a significant degree as revealed in ANOVA testing. The REGULATION frame corresponded to the first two time periods, DELIVERY corresponded to the third and fourth time periods, and PARTNERSHIPS corresponded to the final time period. The implications of these findings are discussed in the next section.

CHAPTER VI

DISCUSSION AND CONCLUSIONS

This section discusses the results of Frame Mapping described in the previous chapter. Also, Frame Mapping is evaluated as a method for analyzing text.

Furthermore, this section identifies areas for improving this study, examines implications for theory and practice raised by the study and presents an agenda for future research.

Futures Rhetoric As One Of Many Frames.

The first research question suggested that futures rhetoric represents one of several frames emerging across time in the advertising press' coverage of cable TV. Conclusions from the analysis and results shed light on this question.

Concept Mapping of key terms from the cable television articles revealed 14 frames considered to be logically consistent and of substantive value (see Table 6). In order of their discussion from the previous section, the frames are briefly recounted and conclusions are drawn about the frames and their contribution to answering the first research question.

The REGULATION frame is created from the largest cluster of key terms from the Concept Mapping Analysis. It represents aggregate issues of legal and regulatory concern brought on by cable televisions interruption of the status quo world dominated

by the three broadcast networks. Advertising Age's coverage includes numerous meetings of the National Association of Broadcasters (NAB), speeches by FCC members, and others concerned with the challenge to content, revenues and profit represented by the cable newcomer.

The frames HOME, INVESTMENT and FORMAT clustered tightly together and their substantive themes relate to the infrastructure needed to deliver cable content to its subscribers. Representative articles covered the growth of cable systems, development of rate structures and content providers (or sources).

PARTNERSHIPS represents a frame of coverage concerned with the development of strategic alliances. A relatively small frame, by evaluation of the number of key terms, it addresses the resultant pooling of resources, particularly in the area of pay-per-view television.

The next four frames clustered tightly together and their substantive themes are consistent with the concerns of the advertising industry: ADVERTISING, MEASUREMENT, PENETRATION and AUDIENCE. Perhaps no other set of frames better captures the intimate relationship between the advertising industry and its dependence on audience measurement. The frames are consistent with the commercial culture described much earlier in the study. The viability of the medium is evaluated by agency principles, cable operators and media planners alike on cable's ability to deliver an audience. As penetration increased, the monies allocated to the new medium

increased and discussion about the effectiveness of such placement became a focus of the industry.

FRANCHISING emerged as a frame capturing the business and entrepreneurial side of cable television's growth. FRANCHISING clustered with the PARTNERSHIPS frame, reflecting their logical thematic similarity. As cable television emerged as a viable commercial medium, the franchising became the model of expansion for business concerns as they sought to increase their revenues and profits, both dependent on the continued adoption by subscribers.

The MONOPOLY frame is thematically similar to REGULATION but reflects a subtle distinction in the type of activity involved in cable television's legal arena. Early concerns over content piracy and audience rights reflected in the REGULATION frame give way to different issues, such as improprieties in franchise practices, access requirements and monopolistic practices created by exclusive facility ownership. This frame captures the deregulation issues that run throughout the contemporary story line of cable television emerging after its realization as a viable commercial medium.

COMPETITION captures a smaller theme of capitalistic exchange between dominant personalities and increasingly larger companies controlling the content, distribution and politics of cable television.

Finally, PESSIMISM and EXPECTATION are similar frames interpreted to represent the dialectics suggested by the rhetoric of technological determinism and

Carey's "rhetoric of the electronic sublime." The manifestation of this rhetoric is a commercial variation of the expected theme. That is, the social impact component is noticeably absent but replaced with an ongoing debate of the impact the new medium will have/has on the current communication market.

Recall that the rhetoric of technological determinism is a two-headed coin. On the one side, its rhetoric reflects a near blind faith in the power of technology (and media innovations) to empower the individual to unsurpassed heights of achievement, not to mention the democratization of communication. On the other side, the less than optimistic view is that technological innovation is an unwelcomed and harmful threat to the order of the status quo.

The variation of futures rhetoric represented in *Advertising Age's* coverage of cable television never takes on the question of the impact of the new medium on the individual or the larger cultural scene. Rather, the focus is rather on the commercial culture, a place where the audience, advertising, revenues and profits converge on a stage where the consumer is dimly seen through a cloud of legal and regulatory negotiations.

The first article to demonstrate the industry's insecurity with what to do with cable television appears in the May 18, 1964, issue: "U.S. May Leave New Developments in TV to Interplay of Market Forces." The threat to the broadcast television industry came to the forefront of industry discussion as one man's optimism

for the future of cable television was another's threat to the dominance of the broadcast world. Despite the ensuing legal battles between broadcasters and CATV entrepreneurs, *Advertising Age's* February 13, 1967, and July 10, 1967 issues demonstrated that the advertising community wasn't sure what to do with cable: "Advertisers Watch Progress of CATV in NY, Ponder Effect on TV Viewing, Three Companies Sell Hookups, Americana Waits Result of Legal Test" and "CATV Still Mostly Potentiality, But Its Possibilities Look Bright, Conference Told." Despite an article also appearing in the July 10, 1967 issue, titled, "FC&B Decides to Enter CATV: It's Exciting," Advertiser's were silent in their commentary on cable television waiting for a less risky, certainly less litigiously embattled, arena in which to embark.

The study shows that the presence of a commercial form of "futures rhetoric" is indeed present in *Advertising Age's* cable television coverage. The absence of a concern for the cultural impact of the new medium can be seen as a characteristic of the industry's intense business orientation. Advertising professionals are client advocates, not cultural advocates, and their trade publication, as one would expect, is concerned with the impact of the new medium on business culture.

This reasoning also offers some explanation of the late appearance of cable television coverage in *Advertising Age*. Public discussions of cultural impact would not be expected in a business trade publication until that impact bounds into the world of its

practitioners. It may be that the earliest discussions of cultural impact are found in general media venues whose domain covers society and culture at large.

Diffusion Time Periods Characterized by Distinct Frames.

The second research question suggested that time periods corresponding to the evolution of cable television might be characterized by distinct frames. Recall that the assumption is that the relationship between the advertising industry and the growing audience made possible by cable television is inextricably linked to the degree that the emergence of an increasingly substantial audience would cause shifts in issues concerning the advertising industry.

The application of Frame Mapping to the 14 frames demonstrated that several of the frames co-occurred with great consistency. Additionally, many of these clustering frames were thematically consistent and logically reduced to aggregate frames. As a result, the 14 frames were reduced to nine (see Table 16). Three of these frames, REGULATION, DELIVERY, and PARTNERSHIPS were demonstrated to correspond with time periods of interest to the understanding of the evolution of a new medium. These frames, having been previously discussed in terms of their component frames, are briefly reintroduced to set up a discussion of conclusions drawn from their respective relationships to specific time periods.

REGULATION corresponded to the first two time periods associated with beginning of cable television adoption by consumers. These time periods correspond to

the “innovators” and “early adopters” categories in the diffusion literature. As noted earlier, the emergence of the new communication technology posed threats to the traditional broadcasting industry. Issues related to the REGULATION theme ranged from content piracy issues to the perceived threat that “pay-television” posed to the free delivery system in place for nearly 15 years.

The government's involvement in cable television is also attributed to a matter of timing. The FCC had a great deal of political and financial currency invested in the promotion of UHF signals for broadcast television. Cable television undermined those efforts and challenged the government's view of the communications future.

The DELIVERY frame is a composite of three smaller frames, including HOMES, INVESTMENT and FORMAT. In sum, the DELIVERY frame reflects themes related to the delivery of cable television services to subscribers. Frame Mapping revealed the correspondence between the DELIVERY frame and the third and fourth time periods (“early and late majority” categories). It is natural for the documentation of a medium's evolution into commercial viability to include themes related to its growing infrastructure. Having survived legal challenges, the race for commercial acceptance demands success in reaching the potential audience. Financial investments, composition of the medium, distribution of content and the subscribers themselves become the foci of interest. What is particularly noteworthy is the trade press' shift to frames of DELIVERY despite regulatory activity that would dot the

landscape throughout the medium's diffusion. These regulatory peaks are seen in the time series plot in Figure 21. Apparently the issues are no longer of primary importance as the trade press focuses on frames of DELIVERY.

The pattern of emergence and association for the frames REGULATION and DELIVERY suggest that new media may progress through their own rites of passage. Moving from its earliest development to full commercial viability, a new medium first penetrates the existing pattern of the communications industry, forcing significant adjustments as major players resist encroachments made by the newest suitor for commercial dollars. Regulatory efforts and legislative activity serves to stabilize the market, enabling the survivors to position themselves for the impending growth into the consumer market. Delivery infrastructure makes the connection from provider to audience (or in this case, subscriber).

The sequential pattern described in the preceding paragraph is demonstrated clearly in the Frame Mapping procedures. Note that the REGULATION and DELIVERY frames do not combine until the very last distance from the origin, suggesting that they appear with the least co-occurrence in the text. The clustering and proximity in multidimensional space between the two frames and the respective adopter time-period codes supports this time-ordered conclusion. In addition, their correspondence to the particular time periods is confirmed by ANOVA (see Tables 8 and 9).

The early controversy in cable television indeed would be expected to delay or precede any serious attention to delivery issues—such as cost, hardware and content development. Indeed, turmoil that involves FCC hearings and congressional acts would be expected to diminish enthusiasm or interest in the spreading of the new medium.

The usefulness of the PARTNERSHIPS frame may be treated with some healthy skepticism. Looking at the mean frequency count for the frame across the five time periods, the mean for the PARTNERSHIPS frame is only 1.28 per article. Upon reflection, the low mean may be a result of having only three component key terms. Another influencing factor figuring in the prominence of the PARTNERSHIPS frame may be the study's article selection process. Recall that articles were first selected based on their identification by independent indexing services, including the Business Periodical Index and the ABIInform CD-ROM database. Then each article was read to confirm that the substantive focus of each article was indeed the cable television industry. This review caused some 95 articles to be rejected from the ABIInform index chiefly because the articles strayed into topical areas such as the information superhighway, telephony and other alternative services. All 95 articles rejected in this manner were removed from the final time period.

Appendix C contains the first four paragraphs from 10 articles randomly selected from the pool of rejected articles. A subsequent review of all of these rejected articles suggests that their substantive content may indeed be consistent with recent

developments in the cable industry referred to here for convenience as "convergence." During recent years, the cable industry has been anticipating the opening of what may be called a telecommunications floodgate, where regional bell telephone operating companies (RBOCs), local and national cable operating companies and others would be allowed to create and deliver alternative services. Such a watershed became reality with the passing of the Telecommunications Act of 1996, signed in to law by President Clinton on January 23, 1996. The Act has broad impact, not the least of which allows the cable television operators and the RBOCs to compete against one another in delivering Internet services such as the World Wide Web and video-on-demand.

The PARTNERSHIP frame's trend of increasing prominence shown graphically in Table 11 and Figure 26 may be a result of recent activity unfortunately removed from the domain of the study as a result of the selection process described above. Allowing this speculation to be taken a step further, the prominence of the PARTNERSHIPS frame might suggest increased business activity inherent in significant changes in the industry, a precursor to the emergence of the "information superhighway." This, however, is speculation and should be addressed with further study.

Although the ADVERTISING frame failed to combine with any adopter time period, nonetheless, it was demonstrated to be a stable and substantial frame and an important finding. Recall that the ADVERTISING frame is formed by combining the

frames AUDIENCE, ADVERTISING, PENETRATION, and MEASUREMENT.

These four frames represent a relationship that can be accepted on face validity: It is expected that the primary concern of the advertising industry in the development of a new medium focuses on the emergence of audience measurement tools. Barnes and Thomson (1985, p. RC-9) underscore this expectation with three assertions from their evaluation of the impact of audience measurement sources on media evolution, the latter two being propositions supported in their study:

- (1) Given the interdependence of the media and advertising industries in the United States, the continued specialization of the mass media is only feasible if it has the support of the advertising community.
- (2) While market- and audience-related factors may provide the original impetus for media evolution, lasting acceptance in the form of advertising support is only attained through the development of audience information sources manipulable by advertising media planners.
- (3) Change in a particular medium will be accelerated by the development and delivery of audience information sources tied to that medium.

The research questions explored in this study revealed interesting relationships in the framing of new media. A commercial variation of the futures rhetoric represents one of several frames emerging across time in the advertising press' coverage of cable TV. Additionally, time periods corresponding to the evolution of cable television can be characterized by three distinct frames. REGULATION corresponds to the

innovator/early adopter periods (1949 - Feb. 1975) suggesting that the first step in a new medium's rite of passage is wrought with regulation. DELIVERY corresponds to the to early/late majority adopter periods (March 1975 - Dec. 1989) suggesting that as the audience grew, the trade press focused on the growing infrastructure rather than ongoing regulatory activity that would continue to dot the medium's historical landscape to the present time. Finally, PARTERSHIPS corresponds to the laggards adopter periods (1990 to present) suggesting that once diffused, the trade press coverage shifts to the strategic alliances being negotiated as players position themselves for dominance and survival. The frame shifts proceeded in an identifiable commonsense manner as the consumer adoption cycle evolved.

Frame Mapping and Content Analysis.

The results of this study, specifically the application of Miller's Frame Mapping Method, hold meaningful implications for content analysis methodology. Researchers will find Frame Mapping to be a powerful tool in capturing thematic developments in text. It is particularly useful in its development of the units of analysis from the data itself rather than being externally imposed as is the case in traditional content analysis. Such a bottom-up, or data-based, flow of data to theory has long been the hallmark of qualitative research. Richards and Richards (1994) explain interplay between theoretical hunches and data-driven research:

Working 'up' from data is often presented as what qualitative research is especially about. It is done in many ways: building new understandings from "thick descriptions"; reflecting on and exploring data records; discovering patterns and constructing and exploring impressions, summaries, pen portraits. All such efforts have theoretical results. They produce new ideas and new concepts, which are sometimes linked and presented more formally as new theories. Most approaches to qualitative research also work 'down' from theory. They incorporate, explore, and build on prior theoretical input, on hunches or ideas or sometimes formal hypotheses. Many also stress the testing of theory derived from the project's data (p. 446).

Because text analysis research involves enormous data sets, it is not surprising that investigators may have been reluctant to explore new areas based on the absence of useful data management tools. The need for data-based systems with capacity for intricate manipulations is called for by Richards and Richards (1994) citing Bogdan and Taylor (1975):

...these processes involve the recognition of categories *in the data*, generation of ideas about them, and exploration of meanings *in the data* [emphasis in the original]. Because the categories and meanings are found in the text or data records, this process demands data management methods that support insight and discovery, encourage recognition and development of categories, and store them and their links with data. Ease of access to data is important to support recognition of the surprising and unexpected, construction of coherent stories, and exploration of sought patterns, as well as construction and testing of hypotheses (p. 446).

The strategies in this study, made possible by Frame Mapping, allow researchers to capture categories and demonstrate relationships between themes emerging from verbatim text in a manner resembling an outline for data-driven research described by Miles and Huberman (1994). The two researchers outlined a 13-step tactical process for generative meaning ranging from the descriptive to the explanatory, and from the concrete to the more abstract. Their treatment of these tactics is quoted at length to demonstrate the parallels of approach:

Noting patterns and themes (1), seeing plausibility—making initial, intuitive sense (2)—and clustering by conceptual grouping (3) help one to see connections. Making metaphors, a kind of figurative grouping of data (4), is also a tactic for achieving more integration among diverse pieces of data. Counting (5) is a familiar way to see “what’s there”—and to keep oneself honest.

Making contrasts and comparisons (6) is a classic tactic meant to sharpen understanding by clustering and distinguishing observations. Differentiation is also needed, as in partitioning variables, unbundling variables that have been prematurely grouped, or simply taking a less monolithic look (7).

More abstract tactics include subsuming particulars into the general, shuttling back and forth between first-level data and more general categories (8); factoring (9), an analogue of a familiar quantitative techniques, allowing the analyst to move from a large number of measured variables to a smaller set of unobserved, usually hypothetical, variables; noting relationships between variables (10); and finding intervening variables (11). Finally, assembling a coherent understanding of a data set is helped through building a logical chain of evidence (12) and making conceptual/theoretical coherence, typically

through comparison with the referent constructs in the literature (13) (p. 432).

Still in its earliest applications, Miller's Frame Mapping is not without its shortcomings. Chiefly, using the method to identify frames is a self-fulfilling prophesy. Hierarchical cluster analysis, by definition, is designed to create clusters based on co-occurrence. Therefore, the appearance of clusters by themselves is insufficient to make claims about the significance or relevance of the "themes" they represent in the absence of an emersion in the data itself by the researcher. Logical consistency in the themes must be supported by reasonable and considered examination of the data as a whole.

Although the frames identified in this study were logically consistent and based on reasonable theoretic ground, there is ample room for improving Frame Mapping as a research tool. Strengthening both the Frame Mapping and this study in particular might warrant the application of some discriminant function based on the initial frame analysis. For example, there is potential that frame analysis might ultimately help practitioners identify the stage of diffusion in which a particular new medium might be located. This can only be true if (1) the pattern of frames found in this study appear consistently across other new media diffusions and (2) that the frames are distinct enough to discriminate one time period from another.

Also, this study, and its application of Frame Mapping, does not address the question as to whether or not a frame "dominates" a time period, only that it is distinct in that time period. Comparisons between time variables and between time periods would require additional work. Adding MANOVA to Frame Mapping analysis expand the method's usefulness in this area.

Framing Cable Television and Diffusion Research Streams.

The findings of this study also represent a meaningful contribution to the diffusion of innovations literature on several counts. First, the study breaks rank with traditional diffusion research by viewing the adopter in a new light. A characteristic of the majority of diffusion studies is the individual as the unit of analysis. Coleman (1958) attributes this to the accepted assumption that if the individual is the unit of response, he or she must be the unit of analysis. The marketing and public relations literature is replete with the evidence that there are numerous key stakeholders in any business environment who must be considered in assessing the internal and external environments of a market. For new media, a principal stakeholder is the advertising industry, its practitioners and its opinion leaders. The success of a mass medium is dependent on the advertising industry's ability to recognize and use it as a delivery vehicle for its message.

This study views the diffusion process of a new medium from the perspective of the advertising industry, the other side of the commercial media coin and heretofore

ignored stakeholder in the new media diffusion process. Second, the study represents a diffusion investigation free from the restrictions inherent in survey and other "snapshot" research methods. Survey research on the diffusion process is intellectually destructive of the "process" aspect of the diffusion of innovations (Rogers 1995):

The survey method and its reliance on recall data opens the door to several problems. Most studies begin at the conclusion of the diffusion process, asking respondents to remember details across their history with the innovation. The length of time, salience, memory and other individual differences make the data suspect from the start. These studies also tend to be one-time "snapshots" of the process at T₂ (p. 124).

The use of archived trade industry articles represents a rich resource for examining the diffusion process along most of its time dimension. The present study embraces the heretofore elusive dimension of time in the diffusion process by creating a diffusion movie. As Rogers suggests, a longitudinal investigation enables greater understanding of social change processes when the spread of a new idea is followed over time as it permeates the structure of a social system (p. 98).

Implications for Theory and Practice.

The ultimate goal of a doctoral dissertation to make some contribution to theory building. This study's contribution to theory is evaluated first and then further implications for practice are reviewed.

The generation of categories, even the simplest descriptors, whether arrived at prior to data reading or by discovery of recurrent topics (Bogdan and Taylor 1975) or *in vivo* categories in text (Strauss 1987), is a contribution to theory:

Decisions are being made about what is a category of significance to the study, what questions are being asked, what concepts developed, what ideas explored, and whether these categories should be altered, redefined, or deleted during analysis. Second, decisions about what text segments are relevant to a category are never merely clerical decisions; they always involve some theoretical consideration. Third, the viewing of segments from many documents on one topic or selected topics always offers a new way of seeing data. This is the major claim of the method to support analysis, and researcher using it clearly engages in the building up of theories (p. 447).

The researcher uses at each stage expectations, prior theories, hunches, experience, and a good education (as with the theoretical determination of textual codes). The network builds up from the bottom, guided by a vision of the structure of a larger-scale network into which these small empirical gleanings must fit (Strauss, 1987).

This study establishes a framework from which to study other new media introductions. Until now, media researchers have relied on anecdotal and other less objective methods to identify patterns of new media evolution. This study introduces a subjective, quantitative method for seeing the patterns of commercial media evolution.

However, the schemata need not be forced upon future data sets, rather it could be used as a contribution to improved understanding, at the heart of which is the thesis that there are regularities to be found in the physical and social worlds (Richards and Richards, 1994). In which case, the theories or constructs that we derive—having conducted an iterative process refining cases on the basis of subsequent cases—should "express these regularities as precisely as possible" (p. 447).

By many measures, this study is a contribution to knowledge. Perhaps, Hunt (1991, p. 176), quoting Paul Surgi Speck, provides the best possible conclusion for the merits of this effort:

A science is served in many ways: by intelligent discussion and fresh proposals, by the extension or completion of previously represented theories, by the fair-minded and unflinching evaluation of current proposals, by justly protesting, blowing the whistle, and pointing out that this kingly theory or that is not wearing a shred of evidence, by sometimes synthesizing and sometimes isolation, by daring to be explicit and—ironically—by daring to be suggestive.

The practical implications of this study relate to enhancing managerial assessment that originate on two levels. The first is a result of the findings of shifts in frames presented earlier; the second is related to Frame Mapping's demonstrated ability to identify key industry issues.

As demonstrated, *Advertising Age* fulfills its industry role as a source for information specific to the advertising/media relationship. A greater understanding of

the relationship between shifts in framing of a new media during its evolution and audience size is useful in practice.

It is this potential for managerial application that drives the call for future research. For the sake of clarity, these issues are presented together here. We have evidence that REGULATION is the advertising press' first frame of cable television and, in time, gives way to a DELIVERY frame as the audience size for cable television reaches and surpasses the critical mass stage of adoption. The third and fourth stages in the diffusion process are characterized by the DELIVERY frame. The final stage in the diffusion process is weakly characterized by PARTNERSHIPS and alliances as technologies converge. The pattern of frame shifts from REGULATION to DELIVERY to PARTNERSHIPS uncovered by this study opens the door to further research as to their prevalence and sequence in the framing of other new media.

Before the above assumptions can be actionable in practice, it is necessary to discover whether the shifts in trade press framing corresponds to the growing audience in other media as well. Had such a model been available 30 years ago, an entrepreneur trying to evaluate cable television might have had greater managerial control with the understanding that the DELIVERY frame signified the reaching of the critical threshold: Cable television was here to stay.

Making such assessment of trade press and other published text is increasingly prevalent in the communications industry. From the public relations field comes such a

practice, known as environmental scanning. Environmental scanning is a contemporary heuristic tool providing early and timely identification of emerging problems and the conversion of that awareness into some significant managerial action (Neufield 1985). The technique is shared by a variety of broad management control approaches such as futures research, strategic planning, and issues management. Despite the divergence in application, the usefulness of the technique is still tied to its original intent as an “early warning of new ideas and changes that could affect [a company’s] environment (p. 40).

Futures research has been described as a “family of analytic methods largely devoted to forecasting or projecting what the future might be, including implications of potential policies and actions (Becker 1985, p. 17). Its use in business is tied to efforts to reduce uncertainty in the marketplace. The basic purpose of employing any of the tools associated with futures research (e.g., forecasting, trend analysis and extrapolation, monitoring, precursor monitoring, and environmental scanning) is the identification of trends, events and discontinuities that may exert significant impact on the firm’s long-range plans.

Issues management emerged as a discipline dedicated to “identifying issues and trends, evaluating their impact and setting priorities, establishing a company position, designing company action and response to help achieve the position, and implementing plans” (Public Affairs Council 1978, p. 8) Hainsworth developed a four-stage issue development cycle that identifies states that are similar to the life cycle of a product: (1)

origin, (2) mediation and amplification, (3) organization and (4) resolution (Hainsworth 1990, p. 33). The Hainsworth study is limited by the definition of issue as a potential conflict to the organization and its publics but lends a useful characterization of issues having a recognizable beginning and end. Ansoff describes a “strategic issue” more broadly as a forthcoming development, either inside or outside of the organization, which is likely to have an important impact on the ability of the enterprise to meet its objectives (Ansoff 1985, p. 133).

Camillus and Datta (1985) identify continuous monitoring of the environment and identification of issues as the first two steps in strategic issues management. Early efforts to identify the key functions of issues management produced three activities: issue identification, corporate proaction, and the inclusion of public affairs issues in established decision-making processes and managerial functions (Fleming (1990). Proaction intended to anticipate public-policy changes and other environmental changes has heightened interest in environmental scanning as a means of managing environmental factors that impinge on an organization.

Molitor (1990) models the process of change along an S-shaped curve with time as the independent variable and three different categories of dependent variables: (1) number of events giving rise to major social problems, (2) number of persons involved in championing an issue and (3) the number of articles or quantity of coverage published on an issue. In his 1990 work “Plotting the Patterns of Change,” Molitor

expanded his model to identify sources for monitoring and prediction that included literature bases (e.g., journals and mass media), advisory reports, and self-regulation efforts:

Written records progress from modest beginnings to the more prolix which serve to explicate parameters and refine thinking...therefore, 'early warning' about emerging problems can be obtained from careful literature search (p. 5).

Molitor's Trend Analysis Program was the earliest effort to scan publications for items that suggested change:

...ideas give birth to change in society and therefore it [is] necessary to determine as a first step where influential ideas arise and how they circulate through society to ultimate emergence as change factors. It seemed...that the most significant medium is the written word: books, magazines, and newspapers. So we needed a system of monitoring key publications that would enable us to spot, identify, evaluate, and track ideas that might shape our future world (Neufield, p. 39-40).

Neufield warns that the signals are not explicit:

Especially in the case of theoretical or perceptual changes, signals are clouded in the rhetoric or agendas of opinion influencers, stakeholders, or movement leaders (p. 48).

Environmental scanning is growing in popularity as a useful method of evaluating current and historical trends in industry environments. The data in

environmental scanning is often taken from trade publications and analysis is intended to identify thematic shifts as trend indicators. Imprecision is a problem, given that organizations typically use committees, designate individuals within the company, or contract consultants to interpret whether the literature actually reveals noteworthy changes. Frame Mapping may be a more systematic method of identifying shifts in issues.

It has been suggested in this study that the advertising trade press' framing of cable television may be different from that of other publications. For example, a commercial variation of futures rhetoric found in *Advertising Age* varied from the descriptions taken from writings of technological determinists. Future research should explore the degree to which frames differ between viewpoints, depending on whether the viewpoint comes from the entertainment industry, the consumer sector or the advertising industry (e.g., *Variety* vs. *Wall Street Journal* vs. *Advertising Age*). This type of comparison also can be made across different industry trade publications (e.g., *Broadcasting and Cable News*, *Advertising Age* and *Editor Magazine*).

The exploratory research conducted in this study served to demonstrate shifts in how the advertising trade press framed the evolution of cable television as a commercial medium. It also extended the application of Miller's Frame Mapping Method by applying the method to finding differences in frames between time periods. Finally, the

study identified theoretical and practical implications of a rite of passage in the successful diffusion of new commercial media.

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175, 29 RR 2d 1621 (1974).

APPENDICES

APPENDIX A
ADVERTISING AGE ARTICLE INDEX

APPENDIX A: List of Articles from *Advertising Age*

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31	10	5/16/60	Community Antenna May Offer Fight Telecast For Fee
34	145	10/7/63	Acquisition Of H&B RKO General's Interest In Community Antenna TV Growth
35	66	4/20/64	FCC Weighs Its Role In War Between Advertiser-Supported TV And Pay TV
35	68	4/27/64	CATV Nets Peril Broadcast Setup, NAB Tells FCC
35	76	5/18/64	US May Leave New Developments In TV To Interplay Of Market Forces
35	19	6/1/64	Still Differ, Salant Tells Collins; NAB Pay TV Views Told
35	3+	6/22/64	FCC Should Regulate Wire TV, Cox, Ford Tell CATV Group
35	82	10/26/64	Boomlet In Value Of UHF Stations Complicated By Rise Of CATV Systems
35	1+	12/21/64	Broadcasters Ponder Potential Of CATVs CBS Copyright Suit Vs. Teleprompter Filed As 'Rural' Unites Enter NY
36	1+	2/1/65	CATV Units Says NAB 'Vitiates' Agreement On 'Control Law'
36	144	2/15/65	Cleveland Groups Seek CATV Rights
36	1+	3/15/65	Report On CATV Backs FCC Plan To Assert Control
36	34	3/29/65	CATVs Imperil All Stations--Especially Those In Smaller Markets, Jacobs Warns
36	1+	3/29/65	Broadcasters Split On How To Handle CATV; United Against FCC 50-50 Plan Some Station Men At NAB Meeting Doubt
36	1+	4/26/65	New FCC Rule Protects Stations; Restricts CATVs Commission Says It Hopes Congress Will Help Out With New Law
36	70	5/3/65	Broadcasters Oppose FCC Interface In Programming; Like CATV Rule

36	44	5/10/65	Control Of CATV Needed To Protect Free Broadcasting, Taft's Rogers Says
36	80	5/10/65	Ohio Bell Enters CATV; Move May Obviate Franchises
36	1+	5/17/65	NAB Names Dille Chairman, Backs FCC On CATVs
36	1+	6/7/65	CATV Plan Aids Broadcaster, Not Viewer: Harris Says Fee Would Ignore Rural Areas Industry Must Be Preserved
36	12	7/26/65	Teleprompter, Others Boost CATV Activity
36	3+	8/2/65	Joint Ownership Of TV, CATV Is Okay, FCC Majority Says
36	16	10/4/65	Telecasters Warn FCC Of CATV Impact
36	2	11/1/65	FCC Hits NCAA Ban Of Notre Dame Game On WNDU-TV
36	12	11/8/65	CBS May Buy Into S.F. CATV
36	1	11/29/65	FCC Must Keep CATV Out Of Big TV Markets: Cox Could Be "Detrimental" Force, Commissioner Tells AA At NAB Fall Session
37	3+	1/24/66	Act Now To Curb CATV, Rogers Urges; It Helps Advertiser, Viewer: Conroy 'Free Ride' Over, Says Taft Head; Don't Freeze Status Quo, Is Reply
37	4+	1/24/66	Battle Lineup: Broadcasters, FCC Vs. CATVs, Their Friends In Congress
37	8	1/31/66	CATV May Become Ad Medium: Ford; No Definitive FCC Stand Soon: Henry
37	1B+	2/21/66	New FCC Policy Hits CATV Growth In Cities, Aids It In Rural Areas Commission Asserts Full Jurisdiction; Seeks Congress Rule
37	36	3/21/66	CATV Rules Aim To Protect Viewers, Present Vhfs New Uhfs, FCC Says
37	1+	3/28/66	CATV Expands Markets-- But Blurs 'Em: Banks
37	3+	3/28/66	Bartley Hits FCC Control Of CATV In House Hearing Protection Begets More Regulation, He Warns, Henry Defends Policy
37	31	5/16/66	Telerama Can't Serve Cleveland Suburbs: FCC Big-City Policy Bars Entering Market With Detroit Signal

37	2	5/30/66	Court Rules CATV Guilty Of Violating UA Copyright On TV
37	8	7/4/66	Ford Urges CATV Operators: Produce One Show Locally
37	3+	8/8/66	Broadcasters, CATVs Hassle In Senate Hearing
37	2	11/7/66	Move Into CATV, ANPA's Smith Advises Dailies Says Medium Already Is Creating 'Primitive Electronic Newspaper'
37	3+	11/21/66	L.A.Times' Explores CATV, Chandler Says May Offer Breakthrough In Developing 'Daily Encyclopedia,' SNPA Told
37	33	11/28/66	FCC Declines To Act On CATV Charged With Unfair Practice
38	2+	1/23/67	ARF Has Backing Of 13 Advertisers For CATV Tests Six- Month Feasibility Trial May Lead To Major Ad Effectiveness Criterion
38	30	2/13/67	Advertisers Watch Progress Of CATV In NY, Ponder Effect On TV Viewing Three Companies Sell Hookups Americana Waits Result Of Legal Test
38	23	7/10/67	FC&B Decides To Enter CATV: It's Exciting
38	23	7/10/67	Broadcasters Told CATV Waivers Pose Threat To Local TV
38	22+	7/10/67	CATV Still Mostly Potentiality, But Its Possibilities Look Bright, Conference Told
38	8	10/30/67	High Court To Review FCC's Rule Over CATV Systems
38	99	12/11/67	High Court To Rule On New CATV Case And Fairness Issue
39	1,10	4/8/68	Broadcasters Alerted To "Wired City" Plan LBJ Visit In Wake Of Withdrawal TV Talk Electrifies NAB Meeting
39	2,8	6/17/68	High Court Affirms FCC's Jurisdiction Over CATV Systems
39	30-32	7/1/68	High Court Copyright Ruling Helps CATV Stance Vis-A-Vis Broadcasters FCC, Congress May Act, But No Speedy Moves Are Foreseen
39	66	7/8/68	Stern Proposes New Name, Services For Cable TV Industry
39	50,54	8/5/68	CATV Ruling Affects Rival Ad Attacks
39	1+	8/12/68	FCC Ponders Rule Freeing CATV In Largest Markets

39	144	10/14/68	FCC Move Seen In Controversy Over CATV As Medium
39	24	11/25/68	Cleveland Ruling By FCC Seen As Setback For CATVs
39	54	11/25/68	Use Of Cable TV To Test Ads Is Lauded By Benjamin
39	83	12/16/68	Report To LBJ Said To Approve CATV As Medium
40	10	2/10/69	We'll Sell Time On CATV If Okay Is Given: Stern
40	38	2/17/69	Shifts In Copyright Rules Won't Destroy CATVs: McClellan
40	2	4/7/69	FC&B Report Shows Gains Tells Of Growth In CATV
40	2	4/7/69	4A's Backs, NAB Hits Ads On CATV
40	125	4/14/69	Let CATV Sell Ads, Justice Dept. Urges FCC
40	3	6/2/69	NAB, Cable Group Working On Policy Pact
40	3+	6/2/69	CATV-Under Wraps, Misunderstood, But Potential Basis Of Ad Revolution Marketers May Use Its Capacity To Pinpoint- If Government Says Okay
40	3+	6/2/69	Task Force Calls FCC Overzealous In CATV Control
40	2	6/30/69	CATV Convention Shows Little Interest In Advertising Possibilities Only Adman Speaker Tells Group They Need Push To Inform Advertisers
40	3+	11/3/69	CATV Leaders Show Mixed Reaction To FCC Program, Advertising Rule
40	77	12/1/69	Canada Cable TV Operators Will Require Ads To Program For Minorities: Metcalf
40	6	12/8/69	NAB Hits FCC Ruling Allowing Ads On CATV
40	2+	12/22/69	Senate Bill Aids CATV; Asks New Talent Royalties Broadcasters Call 2% Performer Pay Plan Catastrophic
41	116	3/16/70	CATV May Step In If Advertising Fails To Clear Up Pollution: Tully FC&B Exec Gets Favorable Response To Criticism Of Ads
41	8	4/13/70	CATV Should Be Utility, Group Told
41	43	5/11/70	CATV Needs Selling Bureau, Gray Asserts
41	2+	5/25/70	FCC Weighs Rule To Expand CATV; Uhf, Educational TV Would Benefit

41	4+	6/15/70	CATV Men To Learn Advertising Technique NCTA Members Told Seminars Will Teach Rate Setting, Time Sales
41	2+	6/29/70	FCC Spells Out, Offer Rules On CATV Practices
41	98-9	11/2/70	CATV Looks Like A Lusty Infant Heading Into Fast Growth Era
41	3	11/9/70	FC&B Asks Its CATV Unit To Reduce Losses
42	14	1/25/71	Ole Parr Scotch Ads Disappear From Manhattan Cable TV
42	63	1/12/71	CATV Seen Backing Into Advertising
42	200	8/30/71	Cable TV Group Issues Its First List Of Ad Standards
42	36	11/8/71	Sammons' Buy Of 10 CATV Units Makes It No.3 Owner
42	1+	11/29/71	P&G, Adtel Incident Reveals Lively Interest In CATV Test
42	4	12/6/71	Confusion Surrounds P&G's Role In Adtel Cable Test
42	26	12/13/71	Cable Men Are Optimistic On New Pact
42	34	12/20/71	Advertisers Can't Pay All CATV Bills: Whitehead
42	16	12/27/71	Future Bright For CATV, Says Study
43	8	1/17/72	FCC Grants Experimental Waiver For Adtel CATV Test Commercials
43	8+	2/7/72	CATV Moves Toward Metro Expansion
43	116	3/27/72	Canadian Cable TV Stations To Delete US Commercials
43	28	5/29/72	Matthews Spells Out What CATV Can Do To Overcome Skepticism Of Advertisers
43	28	5/29/72	Cable TV Could Greatly Improve Life, Nader Says
43	28	5/29/72	CATV System Lets Consumer Talk Back
43	2+	6/12/72	TV, CATV Factions Split On Court Ruling
43	73	8/7/72	FC&B Might Sell CATV Operations
43	37-8	9/11/72	CATV Hooking In To More Homes Than Ad Budgets, But Stations Are Wary

43	66	9/25/72	Rule: Cassettes, Cable Are No Threat To Broadcasters
43	52	11/27/72	Baruch Tells CATV To Draft Standards Now
43	1+	12/25/72	NFL Courting Cable TV With Blackout Of Home Games?
44	19	2/12/73	Sport, Movie Offering Attract Viewer To Pay TV
44	14	4/9/73	FC&B Out Of Cable TV; TCI Buys Five Franchises
44	3+	4/9/73	Lack Of Combined Data Hurts CATV Growth
44	97	5/21/73	US Must Guard Free TV From Cable, Taylor Says
44	50	7/2/73	Cable Not An Easy Buy, Agency Exec Tells NCTA
44	18	7/23/73	Pro Sports May Be Part Of Fare For NY Pay TV
44	8	7/30/73	NETS, NFL At Work On Four-Year Pact
44	1	9/10/73	Cable Men Eye Satellite, Issue Study To Agencies; NAB Mulls Ad Rebuttal
44	66	10/1/73	Quebec Cable TV Plans Worry Canadian Admen
44	2+	10/1/73	Foster, Wasilewski Lock Horns On 'Adbeat' Show
44	1	10/15/73	Print Ad Fight Looms As NAB Urges No Changes In FCC's Cable Position
44	10	11/5/73	Schary Calls Anti-Pay TV Ads By NAD 'Lies'
44	3	11/12/73	Hearings End, But Debate Goes On Between Pay-Cable, Commercial TV
44	24	11/19/73	Wiley Favors Tri-Level Regulation Of Cable TV
44	2	12/3/73	NCTA Silent While NAB's Anti-Pay Ads Holler Away
45	2	1/21/74	White House Unit To Ask Assistance For Cable TV Growth
45	76	4/29/74	FCC To Simplify Cable Rules
45	76	4/29/74	Fairness Rule Will Be Improved Soon
45	73	6/24/74	New Cable TV Network Bows July 15
45	35	9/9/74	Film Shorts Can Lure Steady Cable Viewers, Study Finds
45	24	9/30/74	Cable TV Rates Lure Retailers

45	83	10/14/74	Cable No Threat To Net TV Fare; Baruch
45	83	10/14/74	Valenti Calls For End To Film Strictures On Pay TV
46	3	2/3/75	FTC Moving To Oppose FCC Cable TV Strictures
46	4	10/6/75	ARB, Nielsen Differ On Eliminating Cable Bias
47	61	1/26/76	Growth Of Cable No Threat To TV Vets, Execs Predict
47	2+	3/29/76	Sales Boom Cheers NAB Meeting, But Cable Threat Looms
47	6	4/12/76	White House Backs Off On Cable De-Regulation
48	1+	4/4/77	NAB Ponders Next Move Vs. Cable TV
48	3+	4/4/77	FCC Milified Over Cable Ruling; No Rush To Sell Ads On Pay TV
48	3+	4/18/77	Warner To Introduce 'Participatory' TV In Columbus Cable Test
48	114	10/10/77	High Court Frees Pay Cable To Bid For Sports, Flicks
48	1+	10/31/77	Two-Way Qube TV Breaks Ad Ice
48	3+	12/5/77	Viewers Talk Back To Station As 2-Way Par Cable TV Debuts
48	3+	12/12/77	Advertisers View First Results Of Qube 2-Way TV
49	35	1/16/78	Texas-Based 2-Way TV Operator Cheers For Qube
49	57	7/17/78	Cable TV System Without The Cable Succeeding In Anchorage Market
49	3+	9/11/78	Suppliers Lining Up For Cable TV's Pot Of Gold
49	2+	12/18/78	Ads May Figure In Pay TV Future
49	3+	12/25/78	Will Turner Affect TV Pricing
50	3+	1/15/79	Producers Eye Cable As 1st-Run Outlet
50	2+	2/12/79	Superstation Phobia Dogs Independent TV Meeting
50	3+	2/26/79	Mattel Eyes Software, Cable TV Linkup
50	2	3/5/79	All That Talk Of Deregulation Could Change Syndication

50	3	3/12/79	Program Execs To Take Up Superstations
50	4	3/19/79	Superstation As Superthreat
50	3+	3/26/79	Advertisers Promise Closer Look Into Superstation Possibilities
50	26	4/16/79	Superstation Situation Still Scrambled
50	6	4/30/79	Superstation Carriers Begin Marketing Warfare
50	10+	4/30/79	Turner Lays Groundwork For Superstation Battle
50	3+	4/30/79	Local TV 'Not Threatened'; FCC Urges More Cable Decontrol
50	2	5/21/79	New Cable Net Lands Anheuser-Busch
50	73	5/28/79	Good Fare A Must For Strong Cable Future: Ferris
50	6	6/11/79	FCC Decontrol Stance Threat To TC, Nets Say
50	32	6/18/79	Adventures Of A New Cable Subscriber
50	109	6/18/79	CATV Reps Out Knocking On Advertisers' Doors
50	74	6/25/79	Agencies Take Note Of Cable's Importance
50	89	6/25/79	CATV Unit Sees Big Jump In Research
50	3	7/9/79	AC Nielsen Starts Cable Rating Service
50	14	7/16/79	Will Y&R Help WTCG Breakthrough
50	101	7/30/79	Superstations Find Progress Steady
50	38	8/6/79	Sports Spurt For Garden, UA-Columbia
50	8	8/20/79	Lack Of Cable Audience Data A Challenge To Media Buyers
50	32	8/20/79	Labor Concerned By Cable Compensation
50	32	8/27/79	Industry Watches Superstation Fray
50	52	9/3/79	TV World New Challenge For TV Guide
50	1+	9/24/79	Pay Cable Strong In 1st Nielsen Study
50	44	10/1/79	Warner To Lure Advertisers With Pay Cable TV

50	6	10/15/79	BM Going Through Basic Training With New Media
50	78	10/22/79	Channel For Women Wants Package Goods
50	3+	10/22/79	Cable Nets Gobble Up Sports Rights
50	76	11/5/79	Showtime's Free Movies Lure Customers
50	3	11/12/79	Arbitron Cable Research Move Gains Momentum
50	28	11/12/79	Will Viewers Buy Larger Cable Lineup?
50	22	11/26/79	Black Entertainment TV To Debut In January
50	10	12/17/79	Pay Cable Posts Strong Showing In Nielsen Study
50	63	12/17/79	In Search Of The Bird
50	2+	12/24/79	Bristol-Myers Explains \$25 Million Cable Buy
51	28	1/21/80	Buy Us, Too': It's Showtime For Compton
51	8+	1/21/80	What's On Horizon For Direct Sales?
51	2+	2/4/80	RKO Cable Operations Could Face FCC Review
51	3+	2/18/80	Cable TV Joins In Home Protection Systems
51	12	3/24/80	Panel Mulls Local Cable Methodology Study
51	3+	3/24/80	Cable TV And Politics Mix
51	3+	4/21/80	Getty Oil Prospects For Pay Cable's Gold
51	2+	4/28/80	Getty Cable Plan Draws Fire
51	26	5/5/80	Warner Amex High On 'Movie Channel'
51	72	5/5/80	Cable TV Pitching Big-Spending Advertisers
51	48+	5/12/80	Marketing Is Coming To Cable
51	12	5/19/80	Backe Ouster Hints Of Upcoming Clashes
51	4	5/26/80	Stores Boost Direct Mail, Eye Cable
51	24	6/9/80	Tour Guide Turner Unveils CNN
51	78	6/9/80	CNN Draws New Advertisers, Furor Over Promos

51	74	6/16/80	ESPN Staffing Up For Sept. 1 Debut
51	70	6/23/80	Teleprompter Tries To Fight City Hall
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51	22+	7/7/80	Teleprompter Hikes Also Raise Ire
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51	S2+	7/28/80	Publishers Sign For Cable TV Share
51	72	8/4/80	Rainbow, Cinemax Join Cable Crowd
51	74	8/11/80	Getty's Cable Group Hopes To Clear Justice
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51	54+	8/11/80	Cable News Sample Wins Applause
51	3+	8/18/80	Cable Books Home In On TV Guide
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51	42+	9/1/80	Plan For 24-Hr. WGN Thrills Cable Operators
51	62	9/8/80	Canada Cable Owners Rush To US
51	3+	9/8/80	Cable Rep Fight: 3M Unit's Deal Irk Competitors As All Scramble To Lure Sponsors
51	2+	9/15/80	Jankowski Sets CBS Cable Plans
51	34	9/22/80	Showtime Ready To Chase Cable Leaders
51	1+	9/29/80	Key Viewers Cool To Cable Fare
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51	3+	10/27/80	Cable Gaining On Nets
51	72	11/3/80	Canada Pay TV Party Begins, But US Operators Not Invited
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51	76+	11/17/80	Mike Dann's Look At Video Future
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51	2+	12/8/80	ABC Gets Culture: Cable Unit Goes After Underwriters
51	70+	12/8/80	Jones Leads CBS Through Cable Maze
51	50	12/15/80	CNN Evokes Tears Of Joy, Relief
51	74	12/15/80	Ferris To Back CBS Cable Bid
51	1+	12/15/80	RCTV Joins Cable Derby
51	50	12/22/80	Cable Units Ready Ratings, Ad Code
51	25	12/29/80	Tribune Makes Cable Bid
52	70	1/12/81	Premiere Not Quite Ready For Violin Encore
52	101	1/19/81	PBS Chief Slams Foes, Sees Pay Net Debut In '83
52	48	2/2/81	Why CBS Wants Cable Waiver
52	70	2/2/81	Meredith Taking Its Franchise To Cable
52	2+	2/2/81	Hearst and ABC Tell Cable Plan
52	2	2/9/81	Massive Cable Study Set To Roll
52	56	2/9/81	Showtime: We're No. 2 And So We 'Try Harder'
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52	70-1	2/23/81	CNN Hits Blocks On Tortuous NY Path
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52	18	5/18/81	California Market Tops CATV Penetration
52	3	5/25/81	Cable, Daytime Nag NBC Affiliates
52	60	6/1/81	Ayer Exec Sees CATV Boosting Alert Books
52	62	6/1/81	CATV: Good News, Bad News For Big 3
52	52	6/22/81	Cable Is Now Ready; Are Direct Marketers?
52	10	7/13/81	Cable Has Key Role In "Showdown" Bout
52	56+	7/13/81	Cable Systems Eye Lucrative Northeast
52	56+	7/20/81	Cable TV Rolls Out
52	48	7/27/81	Turner Fights Must-Carry Rules
52	48+	8/10/81	ESPN CATV Comp Sparks Rating, Reveling
52	57	8/17/81	Cable Meet Issue: Upgrading Old Systems
52	77	8/17/81	Creatives Share Blame
52	3+	8/17/81	Group W And ABC Link For Cable News
52	38	8/31/81	CBS Begins Hunt For Cable Systems
52	10+	8/31/81	Turner Rips '2nd Rate' ABC Cable Effort
52	50	9/7/81	Local Cable Ideas Abound At CTAM
52	52	9/7/81	CTAM Meet: Where's Cable Headed?
52	71	9/14/81	Things Upbeat At Music TV
52		9/14/81	Christian Cable Net Sells Alternatives
52	12	9/21/81	Cable Fights To Shuck City Hall Controls
52	68	9/21/81	BAR Cable Service Set
52	1+	9/21/81	ABC, ESPN In Team-Up Talks
52	2S9+	9/28/81	A Piece Of The Action Media Companies Bank On Sports Teams To Lead Them Into Cable Age

52	3+	9/28/81	ABC, ESPN Strike Deal Sponsors On Sport Pay Net?
52	60+	9/28/81	WOR, WGN Reluctant To Ape WTBS Lead
52	94+	10/5/81	Spotlight Falls On Cable Software
52	66	10/12/81	Meet Casts Doubts On Direct Broadcast
52	94	10/12/81	Dann Sees \$350 Million In '83 Cable Software
52	3+	10/12/81	Cable Mart Heralds Service Clash
52	6	10/19/81	CBS Cable Pulls Out The Stops In Debut
52	76	10/19/81	Suppliers Battle For Cable Meet Buyers
52	81	10/19/81	JWT Heavily Into Cable Shows
52	84	10/19/81	Future Weak For Made Cable Films
52	86-87	10/19/81	Labor Pacts Sow Confusion Over Cable
52	89+	10/19/81	Prospects Galore, News Channel Says
52	32	10/26/81	MPA Hears How To Profit From Cable
52	60	10/26/81	Print Syndicate Fare Translated For TV
52	66-7	10/26/81	USA's Three Owners Study To Pay Cable
52	sec.2 30-31	10/26/81	Consumer Poll Plugs Into Cable
52	74	11/2/81	Group W's Ritchie, Disney Talk
52	1+	11/2/81	Turner, CATA Fight Bill
52	68	11/9/81	Why Local Officials Rap Cable Systems
52	70	11/9/81	Reeves Set Custom-Made Cable Fare
52	72	11/9/81	Katz Bridges Gap With Partners Plan
52	2+	11/9/81	Cable Coalition Fights On Despite NCTA
52	2	11/16/81	Hardware For Cable Ahead Of Demand
52	2 4+	11/16/81	Rethinking Policies
52	2 S14+	11/16/81	The Cable Inter Connections

52	2/18+	11/16/81	Programmers Can Hold The Creative Strings
52	68+	11/16/81	Starting Over' A Challenge For Simmons
52	S2 1+	11/16/81	Cable TV: It's Still In A Swirl
52	S2 2+	11/16/81	From Static To Success: A History
52	S2 518	11/16/81	Agencies May Have A Big Say On Content
52	52	11/30/81	Getty Venture Chief Entertains Inquiries
52	S68	12/7/81	How A Cable Ties Together Disparate Set Of Interests
52	36-7	12/21/81	Stanton Enjoying Second Career In Cable
53	38	1/4/82	Kickoff Begins In Cable News Cup Battle
53	6+	1/18/82	Cable Outfits Hoping To Score With NBA
53	60	2/1/82	Cable Coupon Mailer Readied
53	48	2/8/82	Movies, Movies Everywhere...Often The Same Ones, Pay Cable's Lament
53	52	2/15/82	Silverman Out Stirring Up Interest In Cable Plans
53	1+	2/15/82	CBS-USA Link Hikes Event Bidding War
53	sec2 M-18	3/8/82	Pay TV Goes On The Prowl To Seek Old Movies
53	52	3/15/82	Escapade Is Blue, But Short Of Raunchy
53	14	3/22/82	New Cable Acceptance Shown At NATPE Meet
53	22	3/22/82	Multiple Units A Multiple Headache For Msos.
53	63	3/29/82	Lot Of 'Talking Heads' In Daytime Debut
53	52	4/12/82	Cable Health Net Pioneers New Ad Areas
53	48	4/19/82	Sports Take Their Positions On Cable Use
53	48	4/19/82	CATV Previews Book Subscribers
53	18	4/26/82	Miles To Wire, Promises To Keep
53	2 M13	4/26/82	Mixed Signals Riddle Picture
53	S2 14	4/26/82	Making The Viewer Connection

53	20	5/3/82	Turner Proudly Displays CNN Nielsens
53	58	5/3/82	Cable Franchise Bidding Humbles Many
53	62	5/3/82	Original Series Seen As Next Cable Trend
53	62	5/3/82	Pay TV Ads Said 'Inevitable'
53	58	5/17/82	Cable Panel Agrees On 'Lousy' Sales Job
53	46	5/24/82	TCI Dealing Tough In Upgrading Program
53	sec2	5/31/82	Cable Snafus Frustrate Franchise Contenders
53	m22+ 20+	6/7/82	Program Listings Plague Cablecasters
53	46-7	6/7/82	Denver Drama Demonstrates CATV Battles
53	45-6	6/21/82	HBO Commits To Original Product In Big Way
53	60-1	6/21/82	CBS Cable Begins To Tryout Via Texas Mso
53	sec2	6/28/82	Where There's A Will, There's A Way
53	M26 28	7/5/82	SNC Hands Out Small Bits Of News
53	2+	7/12/82	Pay TV To Try Series Programming
53	33	7/26/82	Mixed Response To Pay TV, Recession Link Some Drop It To Trim Budget; Others Say It's Leisure Value
53	34	7/26/82	TCI To Test Cable News Shows Head To Head
53	3+	7/26/82	Cable Discovers Marketing
53	38	8/2/82	NCTA Bids For Protection From Overcontrol
53	50	8/16/82	Movie Outlets Checking Into Hotel Market
53	2	8/23/82	Home Is Where The Cable Is
53	34	8/30/82	TVB On The Road With Its View Of Cable TV Cable, Cable Fact Or Fable?
53	2 M18	8/30/82	Sports Hook Up To Regional Cable
53	M10	8/30/82	What's All The Fanfare For?
53	M4-15	8/30/82	Cable Casts Its Line And Reels In Some Catches
53	44	9/6/82	Gloom Thick At CBS Cable Despite Bright Programs

			Applause, Applause For CBS Cable
53	2 M28+	9/6/82	The Cost Of Learning About Cable
53	51	9/13/82	Pay TV Market Is Reeves' Nest Target
53	3+	9/13/82	Disney, Group W Cable Split
53	1+	9/20/82	Cable TV Shakeout Begins
53	66+	9/20/82	Warner Amex's Golden Touch Tarnished In Dallas
53	50+	9/27/82	Dissension Abounds Over Control Of Cable Ads
53	65	10/11/82	CNN Gets Mileage From Print/Cable Tradeouts
53	6	10/25/82	UK Rules Not Stopping Foreign Links In Cable
53	54+	10/25/82	Former Admen Cram For 'Paper Chase' Rival
53	52	11/15/82	CATV Operators Churning Over Disconnects
53	18M+	11/15/82	Are Agencies Buying The Cable Message? Industry Finds It A Hard-To-Sell Proposition
53	2 M12	11/15/82	Charting Cable Guide-Land
53	10	11/22/82	Ad-Backed Cable Losses Mount
53	43	11/29/82	HVN Lacking Programming Pacts
53	66	11/29/82	Cable Leaders Huddle On 'Dealing With Realities'
53	M19+	11/29/82	Cable Hums With Black Efforts
53	75	12/6/82	Qube At 5--Just Hitting Potential
53	41+	12/6/82	Kahn Says Stagnant Ad Ideas Slow Cable
53	11	12/27/82	Ritchie Critical Of Cable Ad 'Postmortems'
54	51	1/17/83	New Venture Challenges HBO
54	46	1/17/83	Cable Audience Next Target For Radio
54	2M34+	1/17/83	Shaky Reception Follows Cable Marriage
54	2M3D+	1/17/83	Wizard Sharpens His Catalog's Image On Scale
54	44+	2/14/83	Playboy Cable Booking Has Canada In A Lather

54	2M12	3/14/83	Interference At The Movies?
54	42+	4/11/83	CBS Study Highlights Tiny Cable Ratings
54	1+	4/11/83	Cable Gets Serious On Ads
54	46	4/11/83	Weather Channel Forecasts Sunshine
54	20	5/2/83	Broadcasters Drafting Cable Game Plan
54	66+	5/9/83	Cable "David" Takes On Must-Carry Rule
54	52	5/16/83	Hefner Pushing Hard For Playboy Channel
54	58	5/23/83	Extra Baseball Games To Cost TV Viewers
54	34+	5/23/83	Many Eye "Newsday" Cable Effort
54	50	5/30/83	Sears Creating CATV Series
54	M16	5/20/83	Will Cable Prove Able?
54	36	6/13/83	Cableshop Scores With The Longer Ad Pitch
54	36	6/13/83	Cable's Siren Song Pierces Agency Resistance From Prune To Plum
54	16	6/13/83	CHN Narrowcasts With A Healthy Reach
54	28	6/13/83	The Medium Is Potent, If The Message Is Clear Intuition May Finally Have Found Its Niche
54	11	6/13/83	Critical Crossfire: An Industry Hazard
54	38	6/13/83	Battle Looms Over Duplicate Programming
54	38+	6/13/83	Made-For-Pay' Signals New Cable Directions
54	40+	6/13/83	Media Monopoly As Play En France
54	42	6/13/83	Advertisers Make Connections On The Videopath
54	38	6/13/83	The Ebb And Flow Of Funds
54	75	6/20/83	Cable Bill's Outlook In House Uncertain
54	1+	6/20/83	CATV Looks To Viewer Woes
54	1+	6/27/83	Busch Plans Own Cable Sports Net

54	61	7/11/83	Video Ad Potential In Europe
54	1+	8/8/83	Cable Getting Upfront Look
54	44	8/8/83	CBS Plugging Into New Role As Cable Rep
54	14M	8/22/83	Package Goods Technique Goes Cable
54	48	8/27/83	Ads For Cable TV Likely To Create Static
54	54	8/29/83	ESPN On Trail Of '88 Olympics TV Rights
54	38	9/5/83	Cable Proves Worth In Civil Rights Coverage
54	72	9/19/83	ESPN Rebounds In South Via Regional Pay Net
54	64	9/29/83	Adman Sees Pay TV Ads Easing Sports Fees
54	14M	10/3/83	Striking A Responsive Chord In Cable
54	86	10/17/83	CATV Operators Rush For Snc Substitutes
54	66	10/24/83	Turner's SNC Purchase Raises Questions
54	68	10/24/83	Turner Pulls Ones Out Of The Fire Again
54	46-47M	11/7/83	Media Departments Spearhead Cable Studies
54	44-45M	11/7/83	Still Fighting For Advertisers' Respect Eastman Cable Rep May Close Up Shop
54	74	11/14/83	Listings Attractive Despite Time Failure
54	1+	12/12/83	P&G Slates Cable Ad Hike
54	1+	12/19/83	Atari Founder Develops Revolutionary TV
54	40	12/19/83	Staying Power Key To Bresnan's Success
54	40	12/19/83	Marketing Outdraws Programming At Cable Meet
55	48	1/9/84	Baptists' Planned Cable System Seeks Ads
55	M30-33	2/20/84	Cable Bringing More Precision To The Test Offers Control Of Environment, Costs
55	52	2/27/84	Talks Resume On Local Cable Control Bill
55	50	3/5/84	Warner, WXIX Team For Interactive Spots Viewers Urged To Touch In For More Data

55	44	4/2/84	Regulation Target Of Cable Speech
55	44	4/2/84	Cable-Ready TV Sets Spurring Lawsuits
55	12	4/2/84	P&G Saving Money With Cable TV Series
55	58	4/2/84	ACTV To License System
55	1+	4/9/84	Turner's ESPN Bid Pondered
55	42	4/9/84	It's Time To Rate Ad-Supported Cable Shows
55	14M	3/12/84	Politicians Count Votes In Battle To Cable Paris
55	3+	3/19/84	Some Big Advertisers See TV Sports Clutter
55	50	4/30/84	Disney Channel Enters Its Critical Phase
55	64	5/7/84	TBS Easing Sting Of Rate Increases
55	18-19	3/12/84	Can Murdoch Rule The Skies?
55	18-19	3/12/84	Test Status Dogging German Cable
55	39-40	5/31/84	Technology, Laws Sinking Plundering Pirates
55	44-45	5/31/84	Translating Print Into Programming
55	44	5/31/84	Media Town Big Enough For Both
55	48-49	5/31/84	Advertisers And Cable: Marriage Made In Heaven
55	30+	5/31/84	Networks Stake Survival On Ad Revenues
55	48-49	5/31/84	Local Operators Don't Quite Connect-Yet
55	46-47	5/31/84	Flashiest Performer Burns Out
55	26+	5/31/84	Bursting The Pipeline
55	22+	5/31/84	Playing Up Programming Potential
55	50+	5/31/84	Discussing Dollars Makes Sense
55	19	5/31/84	Politics Cloud Cable's Outlook
55	40	5/31/84	PPV Snags Videocassettes
55	52	5/31/84	Cable Tries To Lock Up Security Industry

55	20+	6/11/84	A Nation Of C-SPAN Junkies
55	66-67	6/11/84	To The Cable TV Survivors Go The Spoils
55	1+	6/21/84	Cable Ruling Leaves Issues Unanswered
55	61	7/9/84	New Format TV Ads Expected
55	66	7/9/84	Is HBO Tightening Its Belt
55	60	7/23/84	Cable Franchise 'Settles' In San Angelo
55	48	7/30/84	CNN, C-SPAN Are Winning Ticket Frisco Thank Goodness For Cable News Network And C-SPAN
55	34	7/30/84	Wrestling's Got No Hold On Big Advertisers
55	69	8/13/84	Turner Considers Competition For MTV
55	68	8/13/84	Cable Nets Want Local Ad Bucks
55	50	8/13/84	Cable Viewers Get Left-Out Feeling
55	2+	8/20/84	CTAM Told: Expand Cable-VCR Marketing
55	48	8/27/84	Ads For Cable TV Likely To Create Static
55	18	8/27/84	Cable's New Approach To VCR
55	10	8/27/84	MTV's New Music Network May Prove Tougher Ad Sell
55	42	9/3/84	Broadcasters, Cable In Must-Carry Battle
55	87	9/17/84	USA Gongs Original Shows
55	1+	9/24/84	GF Unfolds Cable Ad Plan
55	76	9/24/84	Proserv To Extend Distribution Of Top Shows
55	6	9/27/84	Costly Direct Response TV Spot Promotes Canadian Sports Net
55	7	10/11/84	Cable Network Offers Ad Response Analysis
55	57	10/15/84	CPI Scores With Custom-Made Programming
55	44	10/22/84	Turner Turns To Movies And Music
55	68	10/22/84	CATV Deregulation Raises Basic Question

55	1+	10/29/84	Distillers Inching Toward Cable TV
55	36	10/29/84	Interconnects May Be Cable's Link To Ad Growth
55	13	12/6/84	Local Ads Hit The Spot For Operators
55	14	12/6/84	Problems Mute New Orleans Potential
55	24+	12/6/84	Texans Lone Stars For Statewide Network
55	26+	12/6/84	Indianapolis System Races For Advertisers
55	32+	12/6/84	Lifetime Seeks Provocative Look
55	34	12/6/84	Regional Sports Networks Boast Strong Lineups
55	35	12/6/84	Viewers Rate Services, Programming
55	3+	12/6/84	Cable Marketing Still A Murky Art
55	80	12/10/84	Cable May Flop Pricing Levels
55	13	12/24/84	Turner Zooms In On Camera-Courtroom Fight
56	1+	1/17/85	Showtime Eyes Qube Root
56	1+	1/21/85	CNN: Features In The Future
56	6	1/31/85	Cable Networks To Carry Direct Pitch For Phones
56	44	2/4/85	Cable Operators To Discount Multi-Channel Packages
56	7	2/14/85	Showtime Tunes In TV
56	36	2/25/85	Group W Cable Makes Peace With VCRs
56	49	3/4/85	CNN Raises Iron Curtain
56	64	3/11/85	Court Slams Cable Bidding Plan
56	60	3/11/85	Commander USA Is A Hero Of Cable Network's Ratings
56	74+	3/25/85	Lawyers Move To Unravel Cable Monopolies
56	4+	3/25/85	Proxy Fight May Stymie Storer Comeback
56	2+	4/1/85	More Cable TV Ads, But Creativity Lags
56	50+	4/8/85	Turner's Gamble: Will CNN Fly Across Europe?

56	16	4/11/85	TV Turning Over New Leaf
56	90	4/22/85	Pay TV Services Mired In First-Quarter Slump
56	119	5/13/85	Stroh Sports Its Own TV Anthology Show
56	1+	5/13/85	Boston Ventures, Execs Want More Of Their MTV
56	48	5/16/85	Byerley Feels His HBO Job Is B's Knees
56	27	5/30/85	Industry's Deregulated Forecast Is Rosy
56	16	5/30/85	USA Cable Package Commands Higher Ratings
56	26	5/30/85	Channels Answer Interactive Call
56	22	5/30/85	Sports Channels Play Into Viewers' Hands
56	14	5/30/85	Microwave Offers Alternative
56	13+	5/30/85	Serving Varied Home Entertainment Menus
56	24+	5/30/85	Videocassettes Recorders In Operators' Arsenals
56	6+	6/10/85	Cable Fights VCRs With Ppv
56	25+	7/11/85	Crossing Borders Challenges Sky Channel Spots
56	51	7/22/85	Post Boosts Circulation With Cable Guide
56	40	7/29/85	NAB, FCC May Take Must-Carry Fight To Limit
56	18	8/5/85	Cable Must Deal With Victory
56	29	8/5/85	Cable Guides Ready To Merge
56	70	8/12/85	Turner Pays Dearly For MGM
56	28+	8/26/85	No Lack Of Opinions On NBC Cable News Idea
56	81	9/9/85	ECC Forms TV Channel Language Barriers Eliminated
56	86	9/9/85	Regional Cable Sports Networks Teaming Up
56	84	9/16/85	Acquiring Minds In Cable Now Eye Group W
56	68	10/21/85	Advertising Still Confused About Cable
56	62	11/4/85	MTV's New Ads Stick With 'Irreverent Edge'

56	64	11/18/85	Cable Operators Ready To Dish Up New Twist
56	34	11/21/85	Cable Ratings Move In New Directions
56	32	11/25/85	FNN Cashes In With Nonfinancial Advertisers
56	59-60	12/2/85	TV Rivals Challenging Murdoch In Europe
56	24-25	12/5/85	Sparks Fly After Must-Carry Ruling
56	20	12/5/85	Program Guides Fail To Turn On Advertisers
56	4	12/5/85	Kay Koplovitz-A Cable Innovator Whose Legendary Bouts At The Negotiating Table Foresaw A Revolution
56	26+	12/5/85	Pay-Per-View Ventures Tale On Videocassettes
56	15	12/5/85	Industry Works To Improve Fuzzy Image
56	20	12/5/85	Spot Cable Hopes To Connect With Interconnects
57	31	1/6/86	HBO Ads Latch On To Rising VCR Sales
57	32	2/24/86	Showtime Programs Ad Blitz
57	114	4/24/86	Cable Operators Venture Into Programming
57	59	4/31/86	Foreign TV, Ads Set To Ride Cable To Sweden
57	64	6/9/86	Home Shopping Gets Push From Cable Systems
57	40	10/27/86	CBN's Shoot-'Em Ups Under Fire
57	34	10/27/86	Media Groups PAC A Wallop In '86: They Outspend Ad Groups By Far
57	12	10/27/86	Haimovitz Takes New Post At Viacom
57	S8	12/1/86	Narrowcasters Grid For Program War With The Big 3
57	S1	12/1/86	Profit Picture Sends Operators A Clear Signal
58	1	1/26/87	Merger Trend Hits TV Home Shopping
58		2/2/87	Dormitories Wired For Entertainment
58	S12	3/30/87	MSO Challenges Viewers' Programming Savvy
58	S11	3/30/87	Co-Op Promotion Pushes Products, Shrinks Bills

58	S10	3/30/87	CBN's Image Campaign Spreads The Gospel Truth
58	S8	3/30/87	HBO's Media Blast Punches Up 600,000 Installs
58	S1	3/30/87	Industry Pushing Its New Image To The Public
58	S14	5/18/87	Telecable's Retailer Hookup A Natural
58	44	6/22/87	Home Shopping Net Expands Its Game Plan
58	S14	7/13/87	ESPN Gets Chance To Show The Big Boys
58	1	9/14/87	Wright Eyes NBC Entry In Ratings, Cable
58	75	9/28/87	Explosive Promos Ignite MTV
58	S18	10/19/87	Advertisers Wired About Cable's Reach
58	40	11/9/87	Cable's Power Broker; TCI's Malone Leads His Industry Into New Era
58	44	11/16/87	PBS Sees Growing Rival In Cable
58	S14	12/7/87	New Services Need To Channel Resources
58	S1	12/7/87	Cable TV: Syndicator Wares Fill Cable Cupboard
59	S16	1/18/88	Consumers At Home With Shopping
59	S2	4/11/88	Female Audience Lifeblood Of Lifetime
59	S2	4/11/88	Turner Explodes Barrier Via TNT
59	S16	4/11/88	Koplovitz Sets Sights On Banner Year; Changes At Networks Widen Opening For USA Alternatives
59	S12	4/11/88	Marketers Take Notice Of Viewers' Discovery; Channel Moves Curiosity , Nature, Science Into An 18-Hour A Day Lab For Fresh Programming
59	S1	4/11/88	Cable Halfway Home, Picking Up Speed
59	S8	4/25/88	Travel Channel Reshapes Its Itinerary
59	12	5/2/88	ACTV Plugs Two-Way TV; Coming Soon To A Set Near You
59	52	8/29/88	Interacting With Your TV; Shows Of The Future Will Be Trouble For Couch Potatoes

59	26	9/12/88	NBC Gambles Big On Cable Project; Can It Succeed Where Rivals Failed?
59	S40	10/24/88	TV Magazines Channel Across Europe; No End To Choices For Viewers In An Era Of Deregulation, Cable And Private Outlets
60	S 24	4/10/89	Pay-Per-View Reserves Front-Row Seat In Programming Game; Once Heralded In '85 As Cable's Ace In The Hole, PPV Needed Better Technology And Is Finally Making In-Roads
60	S1	4/10/89	Wounded Networks Go For Jugular; Cable Execs Admit Attack Could Have Been Devastating If Launched Before They Became Entrenched
60	S14	12/11/89	Channeling Cable's Future; Programming Exec Fine-Tunes System Of The 90's At TCI
60	S1	12/11/89	Ted Turner Hones His Midas Touch; Cable's One-Time Maverick Presides Over Solidified Empire And Takes A Thoughtful Look At Cable's True Mission
61	17	3/5/90	Advertiser Channels On Sky Cable?
61	S8	6/25/90	Cable Gains 17.9% Growth Pace Slows, Pay Cable Is Struggling
61	3	7/23/90	Sports Channel Faces Tough Road To Survival
61	25	10/15/90	ESPN, Turner Gear Up For New Cable Era
61	43	10/22/90	TV Stations Try Newscast Sales
61	S6	11/26/90	Cable Proves It's Media's Live Wire; Biggies Direct As Much As 25% Of Ad Budgets
61	S8	12/10/90	Top Buyers Offer Frank Talk On Cable's Place In The Mix
61	S14	12/10/90	Barber May Sharpen Cost-Cutting Blade; Next Task Involves Altering Advertisers' Perceptions Of CNBC
61		12/10/90	Commercial-Free PPV An Olympian Effort
61	S1	12/10/90	Will Marketing Stop The Regulators; Systems Count On Advertising To Help Deter Legislation
62	16	1/28/91	Cable Bounds As Networks Stumble
62	43	4/8/91	Carving Out An Audience; How Three Top Cable Networks Are Building On Their Loyal Base; Baseball Throws ESPN

A Curve

62	36	4/8/91	CNN's Commander In Chief; Johnson Builds On Wartime Halo To Keep Up Momentum
62	41	4/8/91	Basically, Cable Hits A Hot Spot; But Some Execs Feel The Still-Growing Area Is Not Recession-Proof
62		4/8/91	GM Tries 'Documercial'
62	35	4/8/91	The Mother Of All Ratings Jumps; CNN Has Its Shining Moment, But Can All Those 'New Junkies' It Hooked Really Translate Into Growth
62	20	4/15/91	Local Ad Sales Surging In Cable
62	16	4/22/91	Cable TV Critiqued; Agencies, Clients Want More Data, Less Hassle
62	4	4/22/91	High Court Ruling Hurts Industry Stand On Taxes
62	3	5/6/91	A New Take On PPV, Phone, Cable Venture Offers Movie Smorgasbord
62	40	5/20/91	Turner, Actmedia Roll In-Store TV
62	17	5/20/91	Shopping Nets Ready For Face-Off
62		8/12/91	Turner Tunes In To Direct Mail
62	1	8/19/91	Cross-Media Deals Surge Into Cable; CNN-USA Today Package Leads Swell
62	S18	10/14/91	Right Place, Right Time; But Days Of 20% Are Gone, Requiring Some Adjustments
62	6	10/14/91	Cable Plots International Growth
62	28	12/9/91	Cable's Ad Allure Strong Despite Some Budget Cuts; Brands Feel Recessionary Pinch After Run Of Double-Digit Hikes
62	27	12/9/91	The Fight Heats Up In The Middle Rounds; Early Gains Are Past As Cable Learns To Scrap For Its Share Of Successes
62	27	12/9/91	Shooting For Top Gun: McKinney
63	1	12/16/91	Hasbro, Mattel Key Early Upfront; Buys Come After NBC Exits Saturday 'Toons

63	4	1/13/92	Hearst Links With Cable; Cross-Media Deal Includes Inserts, TV Specials
63	s2	2/10/92	Addicted To Research, Nick Shows Strong Kids' Lure; Agency Exec. Says Net Hits The Hot Button
64	3	3/30/92	Cross-Media Allies Dalter MTV, 'Newsweek' Couldn't Find Sponsor For Package
63	s14	4/6/92	NBC Girds For Olympic PPV: Oh, Agony Of The Feat; Critics Kicking Over How Triplecast Is Marketed
63	s12	4/6/92	Sales Software Catching Up With The Cable Boom; Mountains Of Paperwork And Viewing Slots S Serious Hindrance To Agency Buyers
63	s8	4/6/92	Cable's Seeing Double--Or More; Multiplexing Opens The Channel Logjam
63	s18	5/11/92	Return Of Ad Dollar Keeps Buyers Coming Back; Exclusive Cable Flights Now Possible, But If Price Hikes Continue, Agencies Likely To Balk
63	30	11/30/92	How Cable Bill Battle Spilled Into TV Households; Commercials Influenced High-Stakes Fight On Hill
63	26	11/30/92	Trapdoor Slams On New Channels; Clearances, Ad Support Catch All But Best Of Start-Up Cable Nets
63	24	11/30/92	Attacking The Nitty-Gritty Or Reregulation; Channel Repositioning, 'Cherry Picking' Of Shows Could Destabilize System, Dubin Says
63	23	11/30/92	Regulation; Oh, What A Tangled Web; Foes Confident Tough New Law Will Run Afoul Of The Courts
63	3	12/21/92	TV's Next Wave; What's Barry Diller Up To?
64	26	2/1/93	Directv Offers Satellite Feed Of Cable Channels
64	26	2/22/93	Fox Is In No Hurry To Deal After Last Year's Success
64	18	2/22/93	Infomercials Flowering On Cable TV; But Network Affiliates Showing 'Bedrudging Acceptance' Of Long-Form Ads
64	48	3/1/93	Ameritech To Ask FCC For Long-Distance Role
64	34	3/1/93	Doug McCormick; Attuned To Women's Issues As Lifetime Chief

64	8	3/15/93	NBC Splices New, Older Media; Recently Launched Ventures Tap Into Core Network, Station; Diversification Continues
64	4	3/22/93	DDB Needham Tries High-Tech Cable Buys
64	16	4/12/93	FCC Folly
64	s12	4/19/93	Retiering Could Bring Tears To Ratings Watchers; As Channels Get Juggled To Maximize Revenue, Basic Cable Isn't Simple Any More
64	s6	4/19/93	Your Choice Opens New Door To Advertisers; Reselling Of Commercial, Cable Fares Gives Marketers Opportunity To Buy Out Shows Totally
64	s4	4/19/93	Advertisers Hold Key To Expansion; If Viewers Unwilling To Foot Bill...Who Ya Gonna Call?
64	s2	4/19/93	Step Aside For The 500-Channel Elephant; Rules Are Changing In Giant Ad Environment
64	s2	4/19/93	The Dial Is Cast; Telcos Join Cable Battle; Barriers Dropped, Nor' Mega-Msos Will Compete Against Mega-Telephone Companies.
64	31	4/19/93	Cable Net Bargains For Laughs; Comedy Central Readies Home Shopping Show
64		4/19/93	Marketers Poised To Take Over For The Middleman; Do-It-Yourself Programming Attractive In Infomercial Age
64	8	5/10/93	Warner, QVC Go Fishing; 'Free Willy' Deal Could Require Movie Merchandising
64		5/24/93	Time Warner Hits Road Running; Ad Presentations Set For 'Superhighway'
64	s24	5/24/93	Cable TV's Ad Growth Looks To Be Leveling Out
64	3	5/24/93	CBS Defines Role As Top Leisure Bet; Network Turns On Warm, Friendly Image In New Branding Effort
64	8	6/7/93	Macy's Rings Up Home Shopping; Retailer's Cable Venture Comes As Others Rush To Show Their Wares
64	3	6/7/93	Time Warner Studying Infomercials On Cable; Could Use 'Dead Time' To Bring In Dollars
64	8	6/14/93	Cable Leads Interactive TV Surge

64	12	6/21/93	How To Zip Through 5000 Channels Program Guides Sort It All Out
64	34	6/28/93	Cable, Broadcast Spare Over Retransmission
64	12	7/12/93	Pleased To Be TV's Wal-Mart
64	3	7/19/93	FDA Rapped For Death Of Lifetime Medical TV
64	20	8/2/93	Cable Viewers Show They're Loyal; Study: Most Favor Specific Program Genre
64	1	8/3/93	QVC Ups The Ante, And Its Image; With New Q2 Network, Diller Stakes Claim For Younger Consumers
64	27	8/16/93	Prevue-Ing Cable's Future; Program Guide Positions Itself For 500-Channel Universe
64	36	8/30/93	Bells Dial Up TV; Phone Companies Cheer Cable Ruling
64	2	8/30/93	Would Warner Net Be The 5th Or 50th?
64	3	9/13/93	There's A Lot More Than 'B' In Future NBC; Cable, Interactive TV Ventures Abound
64	1	9/13/93	GM, Hachette Take TV Trip; Carmaker, Magazine Publisher
64	28	10/4/93	It's Game Time For Sega Channel; Test Will Explore Options To Avoid Cannibalizing Retail
64	3	10/4/93	Coming To Home Shopping: Apple; Redgate Deal Will Offer CD-ROM Catalogs
64	50	10/11/93	Rabbit Ears Itching To Make A Comeback
64	4	10/11/93	NBC Peacock Wings Around Globe; Acquisition Provides Huge Euro Presence
64	3	10/11/93	Cable Notches Retrans Victory; But Broadcasters Could Use New Tech To Win The War
64	52	10/18/93	Meredith Eyes Cable; Magazine Group Talking To Player Including TCI
64	28	10/25/93	Why This Merger Matters
64	s16	11/1/93	Bumps Lie Ahead On Interactive Lane; Key Variables Are Critical 'To Turn Couch Potatoes Into Couch Commandoes'
64	s2	11/1/93	Coen: It's More Of The Same For '94; Economy, Healthcare Combine To Put The Whammu On Growth

64	12	11/29/93	Q2 Puts On A New Face For Home Shopping
64	1	11/30/93	TV Shopping Plays Grinch For Retailers
65		12/20/93	RCA Beams Into Interactive TV
64	30	12/6/93	Cable Opens To Hispanic TV
64	16	12/6/93	The Pied Piper Of Convergence; Paul Kagan Puts His Money--And Others'--Where His Mouth Is
64	8	12/6/93	Ad Talk Quiet In Cable Sho's Interactive Buzz
64	40	12/13/93	New TV Channel Wants To Do Things Right
65	16	1/17/94	Your Choice Ready To Start Second Test Of TV On Demand
65	4	1/24/94	Hearst Joins Canadian Interactive TV Venture
65	34	1/31/94	Shopping With MTV, U2; Zoo TV Would Specialize In Earth-Friendly Products
65	17	1/31/94	Nickelodeon Calls On Videophones; Slime And Videogames Also Star In Cable Net's Annual Promotion
65	2	1/31/94	Time Warner Service Won't Start Quite Full
65	20	2/7/94	Job Is All Fun And Games For MTV New Media Exec; Del Sesto Interacts With Beavis And Butthead
65	s6	2/14/94	Violence Still An Issue In Kids TV; Recent Announcements Answer Some Questions But Raise Others
65	16	2/14/94	Broadcasters Cheer Hollings Bill; Senator's Plan Would Open Up Cable, Phone Markets To Competition
65	14	2/14/94	Hachette Seeks Informercial Partner For Advertisers; Plan Linked To Automobile Channel
65	20	2/28/94	What Video On Demand Can Learn From PPV; Better Marketing And Pricing May Entice More Consumers
65	22	3/7/94	Seeing Stars In San Antonio; Texas Cable System's Interactive Ads Yield Modest Responses
65	23	3/7/94	No 'Highway' Without Ads
65	18	3/21/94	Net TV's Answer To Private Label Growth

65	s10	4/11/94	What Makes Top Seven Msos Tick; Roadmap Of How Cable Highway Interconnects
65	s8	4/11/94	Adland's New Billion-Dollar Baby Infomercials Fast Approaching Lofty Heights As Revenue Generator
65	s6	4/11/94	Ad-Directed Channels A Reality; Program Around 'Passions That People Have For Various Activities'
65	s6	4/11/94	Waiting To Crack The Code For Computers
65	s4	4/11/94	Turner Original Films On Target; 'Geronimo, Earhart' Give Pioneer Head Start In Multi-Channel Universe
65	s2	4/11/94	Reinventing Cable To Find Place On Converging Superhighway Industry Must Accept That All The Consumer Cares About Is The Programming, The Service And The Price
65	18	4/11/94	Sci-Fi's Futuristic Sales Pitch; Cable TV Network Hopes New Media Will Dazzle Buyers
65	8	4/11/94	Cable's Court TV Lays Claim To 'Rich' Niche
65	45	4/18/94	Cable Execs Moan About FCC Action
65	4	5/23/94	Universal's Multiplex TV
65	8	5/30/94	Info Highway Links Computer, Cable Shows; An Advertising Age Roundup
65	s29	6/13/94	Crossing Over Time Zones An Idea To Boost Spot Broadcast Dollars Creates Skeptics
65	s14	6/13/94	Cable Creating Another Tier Niche Networks Hot As Basic Fare Goes Flat
65	26	6/13/94	Cox Cable Buys Its Way To No. 3
65	30	7/18/94	The First Baby Bell Gets A Green Light With FCC's OK, Bell Atlantic Hopes To Pull Away From Pack
65	41	8/15/94	Ostrow Leaves Agency Life For Cable
65	1	8/22/94	MTV Puts New Twist On Home Shopping
65	62	9/12/94	VH-1 Tunes Up For UK Debut Local Advertisers, Programming Are Core To Service
65	19	10/10/94	Sega Channel Sets Gradual Rollout First Test Results Prove Optimistic, But Kinks Remain As Launch Nears

65	16	10/17/94	Q2 Still Struggles To Break The Mold Spinoff Of QVC Was Supposed To Refine Home Shopping's Downscale Image
65	64	11/7/94	Joe O'Donnell Betting On 24-Hour Infomercial Net
65	22	11/28/94	Fingerhut Cuts Plans For Shopping Net
66		1/16/95	Satellite TV Networks From US Turn On Latin American Viewers
66		1/16/95	EDN Aims To Fill Business News 'Void'
66		1/23/95	Wire Turns Hot For Cable Adding Hispanic Homes; Msos Aim To Boost 20% Penetration Level Into Market's 7 Million Targeted Households
66		1/23/95	Chiat, QVC Team On Infomercials Agency To Buy Rights To Products It Peddles 1st Is Parenting Package
66		1/23/95	FSN Families Like Movies, But Are Not Eager To Shop
66		2/13/95	Business Channel Battle Brews
66		2/13/95	With Cable Link Sega Welcomes Kids To New Fraternity
66		3/20/95	Starwave Shows Its Star Power Deals With 'outside', ESPN And Ticketmaster Buoy Paul Allen Startup
66		3/27/95	Horse Sense Dictates Cable Link A Good Fit Betting Crowd Sees Home Wagering As Way To Rebuild Sport Of Kings
66		3/27/95	Hitting The Pit Stops For Surfin' Cable Dial
66		3/27/95	Fishing For Sales Through Cable Niche Players Like Lure Makers Seek Out Specialized Fare
66		3/27/95	100 Cabooses, Two Or Three Engines Channels Proliferate Finding Way To Survive Long Enough To Make The Elusive 500-Channel Universe
66		3/27/95	In New Growth Phase, Cable Feeding On Itself
66		3/27/95	Computers' Star Is Rising In TV World Advertisers Are Eager For Ventures Like Cable's New C/Net
66		4/10/95	Shifting Cable-Scape Complicates Expansion

APPENDIX B

TOP 10 ARTICLES FROM PURITY FRAME INDEX
REGULATION AND DELIVERY FRAMES

Appendix B

Complete Articles for REGULATION and DELIVERY Purity Indices

REGULATION Frame Articles by Rank in Purity Index

(1) 39:30-32/7/1/68!

High Court Copyright Ruling Helps CATV Stance vis-a-vis Broadcasters

FCC, Congress May Act, but No Speedy Moves Are Foreseen

Unknown

The Supreme Court made it clear last week that owners of TV programming won't be protected from CATV activities unless action is taken by the FCC or Congress.

In a 5-1 decision, the Supreme Court reversed a lower court and ruled that CATV systems are not required to pay copyright royalties for the programming they relay to subscribers. The decision did not extend to programming which might be initiated by CATV systems.

The question of royalty liability for CATV systems has been one of two major points of contention between broadcasters and CATV operators. The other point was settled by the Supreme Court last week, when it ruled that the FCC has jurisdiction over CATV. Both court decisions can be expected to force the FCC to tighten its regulations regarding the areas where CATV may operate.

In an effort to protect television broadcasting and the development of uhf and educational TV, FCC has had regulations limiting duplication by CATV systems since 1962, and has regulated CATV expansion into the top 100 TV markets, since 1966. Until last week, however, FCC did not have a clear indication of its right to make such regulations.

Matters involving CATV which have come before the commission have been handled on a case-by-case basis. At least one FCC official predicts that the copyright decision, in particular, will lead to a shift in the handling of CATV cases.

The Supreme Court decisions have clearly indicated that FCC is expected to control CATV, and it must develop new policies to do the job, the official said. Some kind of policy for CATV allocation must be adopted, he said. If the commission continues its "exhausting" case-by-case procedures, "there will be no commission," he added.

Another FCC official admittedly biased in favor of CATV, said he expects broadcasters to increase pressure on the commission to limit CATV. He feels the commission is likely to consider banning local program origination by CATV, except for church services or other programs not wanted by broadcasters. Presently, little programming is originated by CATV systems, but it has been considered a possible growth area for the industry.

Noting that some CATV systems are owned by, and receive vital financial support from broadcast interests, the second FCC official said the commission might be pressured to raise an anti-trust issue and require the separation of broadcast and CATV ownerships.

Broadcasting and commission efforts to hold back CATV, he charged, are apparently aimed at protecting uhf television, although much of the air space allotted uhf will never be used. The uhf stations on the air "don't have much to offer in programming," he added.

Broadcasting industry efforts to hold back CATV have been "pretty successful" at the commission, and CATV is "going to have to get some real friends in Congress before the FCC will loosen up," he said.

The problem of CATV copyright liability is unlikely to be decided by Congress in the near future, and until it acts, this week's court decision interpreting modern technology in light of legislation passed in 1909, will be the law.

New copyright legislation, with CATV provisions deleted, was passed by the House during this Congress, but is blocked in the Senate judiciary subcommittee on patents, trademarks and copyrights.

In addition to CATV problems, the copyright legislation has floundered on questions of facsimile and photo copying, computer copying and royalty payments for performing artists each time a recording is broadcast. All these problems leave "no possibility" of Senate action during this session of Congress, according to a subcommittee official.

During the past year members of the CATV industry have met with representatives of the broadcasting industry to try to work out a copyright agreement acceptable to both sides. More meetings are expected to be held.

Sen. John L. McClellan D., Ark., chairman of the patents subcommittee, has encouraged the different interests to work out a solution which might be incorporated into copyright legislation. However, government observers are estimating it will be a "couple of years" before all sides come to an agreement. They note that the Supreme Court decision greatly enhances the bargaining position of CATV.

The copyright case which the Supreme Court decided last week started in 1960, when United Artists Television sued Fortnightly Corp. because movies and cartoons owned by United Artists Television had been relayed by Fortnightly CATV systems in Clarksburg and Fairmont, W. Va., without permission.

At the time, the CATV systems carried signals of five TV stations, including three Pittsburgh stations, one in Steubenville, O., and another in Wheeling, W. Va. The United Artists Television films were licensed for showing by the stations, but not for carriage on CATV.

A lower court ruled that Fortnightly must pay copyright fees, because the CATV transmissions constituted performance; the Supreme Court reversed this decision.

Justice Potter Stewart, writing the court's opinion, said that CATV systems did not "perform" the copyrighted material in any conventional sense and, therefore, did not infringe the copyright owner's exclusive right to perform the work for profit.

"We hold that CATV operators, like viewers, and unlike broadcasters, do not perform the programs that they receive and carry," Justice Stewart said.

Although the relationship of broadcasters to viewers is more complex than the situation envisaged by Congress in 1909, "broadcasters have been judicially treated as exhibitors, and viewers as members of a theater audience," Mr. Stewart said. A line is drawn between the broadcasters and viewers, and broadcasters are treated as active performers, while viewers are considered passive beneficiaries, he said.

"When CATV is considered in this framework, we conclude that it falls on the viewer's side of the line. Essentially, a CATV system no more than enhances the viewer's capacity to receive the broadcaster's signals," Mr. Stewart said.

The lower court had concluded that the CATV systems "performed" the copyrighted material by weighing how much CATV contributed to bring about the viewing and hearing of the material, Justice Stewart acknowledged that CATV plays an "active" role in making reception possible in a given area, "but so do ordinary television sets and antennas," he said.

If "mere quantitative contribution" were the proper test for determining copyright liability in the context of television broadcasting, many people "who make large contributions to television viewing" might find themselves infringing on copyrights, including apartment owners who erect master antennas, shopkeepers who rent or sell TV sets and set manufacturers, Mr. Stewart said.

Justice Abe Fortas, dissenting, pointed out that the copyright law and its "performance" concept were not written "with the development of CATV in mind." Applying the words of the law, its legislative history and precedents to the facts in this case "is like trying to repair a television set with a mallet," he said, and recent congressional attempts to formulate copyright rules for CATV have not helped. "Congress has vacillated in its approach," he said.

Justice Stewart, in the court opinion, said, "We take the Copyright Act of 1909 as we find it" and it is up to Congress to make changes in the law.

Justice Fortas said that in his judgment the court's objective should be to do "as little damage as possible to traditional copyright principles and business relationships, until Congress legislates."

However, in his judgment, the majority of the court did not follow this objective, Mr. Fortas said. "In an attempt to foster the development of CATV" the court abandoned some of its own precedents, he said.

Irving B. Kahn, president of Teleprompter corp., one of the country's largest CATV outfits, still favors copyright legislation, despite the Supreme Court decision. "We are thrilled, of course, that the Supreme Court's decision was totally in CATV's favor," he said. "But that decision does not alter the fact that legislation, which is fair to all concerned-the cable TV industry, the broadcaster, the copyright holders and the public will be the proper and enduring solution to the copyright problem.

"Our industry committee, of which I am a member, has been negotiating in good faith with the copyright holders for several months with just that desired end in mind. I hope that the fruit of this negotiation is a bill which Congress can vote on favorably, thus enabling us to achieve very soon the fair solution we all seek."

Charles F. Dolan, president of Manhattan Cable TV, said the Supreme Court's decision relative to copyright liability will speed the growth of cable TV in New York and facilitate the development of new services for subscribers.

The head of the company, which is controlled by Time-Life Broadcast and Sterling Communications, said Manhattan Cable is "considering importing sports programs, feature films and educational programs from Philadelphia stations, that would supplement but not duplicate local programming." He added that the court action should protect subscribers against rate increases that would have been necessitated by copyright charges.

(2) 37:1B/2/21/66I

New FCC Policy Hits CATV Growth in Cities, Aids It in Rural Areas
Commission Asserts Full Jurisdiction; Seeks Congress Rule

The FCC today moved to resolve the CATV dilemma with a plan which seeks to curb CATV in big cities and enlarge its role in small towns and rural areas.

CATVs carrying out-of-town stations would be blocked out of the top 100 markets unless owners can show on a case-by-case basis that left unresolved.

In moving to keep CATV on the defensive in the big markets, FCC was attempting to maintain a favorable environment for new uhf stations, which it anticipates during the coming years as the concentration of all-channel receivers continues to increase.

Reflecting FCC's concern that CATV could become the nucleus of a nationwide pay TV service, the commission's legislative proposal includes a provision which bars CATVs from originating programs.

The commission's plan retains advertiser-supported off-the-air television as the backbone of national service, while using CATV to fill existing gaps in small cities and rural areas.

Reduced protection for small town stations lets CATV provide more program choices for residents of small communities, and represents a major retreat from the commission's long-standing position that communities should rely primarily on local stations.

The success already chalked up by CATV, and a barrage of mail from CATV subscribers, demonstrated that rural residents do not want to be deprived of program choices while waiting for FCC to find a way to bring more off-the-air service to their communities. FCC's new approach is based on recognition that residents of these areas should have access to the programs of all three major networks, and that they are not likely to get them in the foreseeable future from off-the-air local stations.

The impact of the commission's plan on stations will vary according to local competitive conditions, but in general it seems to mean that stations in the top 100 markets will get substantial insulation from CATV competition, and will have an opportunity to extend their coverage into small towns and rural areas by linking up with CATV.

Small town stations will still have an opportunity to seek extra protection from FCC on a case-by-case basis, but on an over-all basis they will be much harder pressed. The existing rule giving them 15 days' protection from duplication of their programs on CATV has been shaved to one day, and there will be no protection when they offer color programs in b/w.

FCC Chairman E. William Henry told a press conference stations will have less opportunity to delay broadcasts of network programs, and viewers will get better service.

Following a briefing by the commission yesterday afternoon, Rep. Harley Staggers D., W. Va., chairman of the House commerce committee, indicated that proposed CATV legislation will reach Congress in about two weeks, and hearing will get under way soon. Sen. John Pastore D., R. I., chairman of the Senate commerce communications subcommittee, said he hopes to get legislation this year.

FCC's action on CATV was studied this week for clues to the likely results when the commission turns to a long-range policy for pay TV later this month

Under present policies, pay TV experiments are confined to a single market. pay TV interests are asking for tests covering larger areas, but there have been indications FCC may decide to submit the problem to Congress.

Rep. Staggers did not predict the outcome of the forthcoming House commerce committee hearings on CATV. In the past, Congress has repeatedly considered the problem, but has been deadlocked under conflicting pressures from broadcasters and CATV operators.

FCC suggested that Congress consider legislation which 1 clarifies the commission's authority; 2 prohibits CATVs from originating programs; 3 determines whether CATVs should be required to secure consent of originating stations before relaying signals; and 4 decides whether they should be deemed public utilities.

FCC chairman Henry said he feels the commission "has done Congress a favor" by "putting the question at issue."

With congress deadlocked, broadcast interests had feared CATV would be able to continue its unregulated expansion into big markets. By asserting jurisdiction, FCC will slow or stop this growth, pending contrary orders from Congress or the courts. By adopting rules which encourage CATV to bring more service to small communities, while protecting advertiser-supported TV in the top 100 markets, Chairman Henry hammered out a "consensus" package which won support from six commissioner holding widely divergent views. Commissioner Kenneth Cox, who dissented, felt the rules do not give sufficient protection to stations. He said past performance leaves little reason for confidence that FCC will stand up to pressure when CATV tries to move into big cities, or to overwhelm existing stations in small markets.

Among the major elements of the plan:

Big Cities: To protect stations from CATV competition, no CATV carrying signals of out-of-town stations can be built without FCC permission. Before getting permission, owners would have to submit to hearings on such questions as 1 the potential effect of the proposed CATV on local stations and prospective stations; and 2 the relationship, if any, between the CATV and pay TV.

Elsewhere: In a major modification of policy, FCC opened the way for CATV to become an integrated feature of nationwide TV service. As a help to small town stations, FCC required that CATVs must carry all stations within whose Grade B contours roughly 70 miles the CATV is located. But non-duplication protection for local stations, fixed at 15 days last April, has been reduced to only one day, and there will be no protection if the local station carries color programs in b/w.

Jurisdiction: Until now FCC has asserted control only over CATV systems which use microwave facilities to relay programs from distant cities. other systems, which pick signals off the air and move them by wire, were unregulated. Under the new plan all systems will be regulated except systems with less than 50 customers, and those serving only as apartment house master antennas.

Disclosures: FCC will not license CATVs, but will require them to file information disclosing 1 the ownership; 2 the number of subscribers; 3 the TV stations covered; 4 the extent of program originations.

In recent weeks, Congress and FCC have been showered with thousands of letters and messages from members of the public and industry fearful that some portion of the decision might eliminate service presently available. With more than 1,600 CATV systems now in operation, and an estimated 2,000,000 homes wired, FCC has been alarmed that the rapidly expanding CATV industry may soon be in a position to bid for popular programs now available on TV stations.

Chairman Henry's "salad bowl," containing mixed concessions to both broadcasters and CATV, was sufficiently attractive so that all major contesting organizations found something to please them.

Vincent Wasilewski, president of National Association. of Broadcasters, and Lester Lindow, president, Association. of Maximum Service Telecasters, both welcomed FCC's decision to assert jurisdiction. They expressed fear, however, that FCC's rules might fail to preserve opportunities for free telecasting in small markets.

Frederick Ford, former FCC chairman, now president of National Community Antenna Association., was pleased that FCC reduced the "non-duplication" restriction. In addition, he said he welcomed the commission's decision to seek legislation.

(3) 56:24-25|12/5/85|

Sparks fly after must-carry ruling

It's a tenuous peace, marked by intense competition but little overt violence.

That could describe the relations between some foreign countries, and it equally applies to the relationship between broadcast and cable tv.

The two industries have co-existed for about two decades, competing for ad dollars, but still sharing a symbiotic relationship.

Cable companies get free programming by retransmitting over the air signals; broadcast stations receive the benefit of wider dissemination of their programming, as well as cable's improved reception.

The glue that held all this together was the FCC's 20-year old "must-carry" rule, and when a federal court declared it unconstitutional in July, the relationship took a nasty turn.

The two sides are taking increasingly bitter swipes at each other before the Supreme Court the FCC and Congress.

The must-carry rule was put into place in 1965 and 1966 by the FCC to ensure that cable systems did not preempt over the air tv stations, and the rule was amended and expanded several times.

The rule required cable systems to transmit all over the air tv signals in their primary area of coverage as well as "significantly viewed" stations, or those watched at least five minutes a week by 50% of the audience.

The systems also had to carry all stations in so-called hyphenated tv markets, such as Melbourne Daytona Beach Cocoa Beach, Florida.

The density of market areas led to a variance in the impact of this rule. While the must carry rule might require a cable system in one area to carry only four or five local stations, in others it might mandate the retransmission of 15 or 20, including the same network affiliates in two cities, thus duplicating prime time programming.

The Arlington, Virginia, cable system, for instance, has been required to carry network affiliates in both Washington and Baltimore, as well as three public tv stations.

While the must carry rule wasn't necessarily a hardship to cable systems with large channel capabilities, almost 80% of the 6,000 cable systems in the U.S. have fewer than 36 channels and almost 30% have fewer than 13. Some cable operators complained the regulation unfairly restricted programming.

But the FCC has held for 20 years that without the must carry rule, over the air stations would be at a competitive disadvantage to cable.

The hookups of many cable systems, for instance, preclude switching to a noncable over the air station without disconnecting the cable hookup. Bypass switches also do not work on many systems.

In adopting the must-carry rule, the FCC also sought to ensure that local stations were not at a disadvantage to big-time distant stations the cable system can import via microwave or satellite dish, paying only a small royalty fee.

In a brief filed before the Supreme Court this summer, the National Association of Broadcasters said, "In the absence of a must carry rule, cable systems potentially could block or impede the local broadcaster's access to enough homes to pose a serious threat to the economic viability and even to the very survival of some local stations."

Challenge to must-carry began to emerge five years ago on two fronts. Ted Turner, licensee of Atlanta superstation WTBS and the Cable News Network, argued before the FCC that the must-carry rule was an unconstitutional abridgment of free speech in that it dictated what programming a cable system must offer.

Quincy Cable TV, operator of a system in Quincy, Washington, argued that the must-carry rule was unconstitutionally confiscating its property -- that is, its channel capacity.

The FCC turned down both Mr. Turner and Quincy, and Quincy sought judicial review of the decision.

Mr. Turner joined the suit, and on July 19, the U.S. court of appeals in Washington concluded that the FCC failed to justify the constitutionality of the must-carry rule under the First Amendment.

The court ruled the must-carry rule deprives cable systems of discretion in selecting programming to offer their subscribers. But the court left open the possibility that the regulation could be redrafted to answer the constitutional questions.

Two weeks later, the FCC voted not to appeal the decision.

After pressure from Congress and broadcasters, however, FCC chairman Mark Fowler said he would consider petitions suggesting possible revision of the must-carry rule.

The NAB is now pursuing the question on constitutional grounds before the Supreme Court, which in September refused to stay the appellate court's decision.

The FCC is accepting proposals for a must carry rule that would overcome the constitutional questions.

There was a brief flurry of activity in Congress over the issue, and several members of the House and Senate proposed legislation to codify the must-carry regulation, but the question quickly became seen as a no-win issue, and Congress in effect has dropped the matter in the lap of the FCC.

The battle is now between the cable operators, represented by the National Cable Television Association, and over the air broadcasters, including the NAB, public tv interests and the Association of Independent Television Stations.

"The must-carry rule infringes fundamental First Amendment rights because they interfere with the editorial discretion of cable operators in selecting the programming to be transmitted to subscribers on their systems," said the NCTA, in a brief filed before the Supreme Court.

"Moreover, the rule gives preferential treatment and, in some cases, 'an overwhelming competitive advantage' to one group of speaker--local broadcasters--at the expense of nonbroadcast cable operators."

The NCTA says there is no reason to believe that local broadcasters will suffer financially from elimination of the must-carry rule, as the NAB has argued. Ultimately, the group says, the ruling will have little impact.

An NCTA spokesman says cable systems are unlikely to drop substantial numbers of local broadcasting stations because cable operators have found that carriage of those stations is popular with their subscribers. The NCTA, he says, has urged its members not to act hastily in dropping must-carry stations.

An NAB spokesman says the cable industry's reputation isn't exactly spotless.

"When it come to franchising agreements, you see what happens. All the cable companies promise the works, and when they get the contract, they try to renegotiate and drop service. I think the cable industry has in this area demonstrated its 'civic responsibility.'"

The NAB says a poll of tv stations taken after the federal court decision showed that many tv officials feared if their stations were dropped from cable systems they could suffer financially or even go out of business.

Representatives of 27 stations responding said they had received notice they will be dropped from one or more cable systems or will have to pay to remain on the systems.

Another worry of broadcasters is the several hundred independent tv stations expected to begin broadcasting in the next few years.

If cable systems are not required to carry these stations, they may not be able to survive, the NAB says.

Elimination of the must-carry regulation will make it extremely difficult for a would-be tv station to receive the financial backing necessary to build facilities.

In the petition to the FCC, the NAB suggested that the must-carry rule be redrafted more narrowly, perhaps by setting a cap on the maximum number of must-carry stations that smaller-capacity cable systems would have to carry; by limiting the extent to which duplicative signals would have to be carried or by more narrowly defining "local" stations.

An FCC spokesman says the agency, as requested by Congress, will issue a notice of proposed rule making late this year, possibly incorporating suggested ways in which the must-carry rule could be redrafted. Public comment then will be accepted, and the commission will consider the issue--early next year at the soonest, the spokesman says.

Until then, the troops remain in the trenches, firing the occasional shots.

(4) 36:114/26/651

New FCC Rule Protects Stations; Restricts CATVs

Commission Says It Hope Congress Will Help Out with New Law

The FCC announced a series of steps today which are designed to protect TV stations from CATV competition.

The full scope of the commission's program still depends on a number of factors, including congressional reaction. But as a minimum, it includes a plan to require that all CATV systems carry the local TV stations, and black out programs which duplicate those offered by the local stations.

FCC also announced it is considering a number of other regulatory questions associated with CATV. These additional regulations could extend to such questions as original programming by CATV, the expansion of CATV into multiple stations markets and cross ownership of stations and CATVs.

The complex issues resolved in today's rulings date back nearly three years. FCC had hesitated to act because it admittedly has serious jurisdictional doubts and there has been an effort to work out legislation which would be palatable to the broadcasters and CATV operators alike.

Negotiations between the two groups collapsed recently when broadcasters insisted that CATVs must be prevented from duplicating a program of a local station for at least 15 days before or after the local station carries it.

One reason, FCC has favored legislation is that many CATVs simply pick signals off the air, and distribute them by wire. While FCC long ago imposed restrictions on CATVs that rely on microwave stations to relay programs over long distances, the commission has hesitated to claim that it can also control CATVs that pick programs off the air without using any facility subject to FCC license.

FCC's decision today represents all out support for the broadcaster point of view. The commission says competition between stations and CATV is an uneven contest. Stations must

negotiate for the exclusive right to carry network and syndicated programs, FCC notes, while CATVs merely pick them up.

Exclusivity, authorized by FCC's own rules, is an essential ingredient of our commercial system, the FCC argues.

FCC cites the commercial implications for small market stations and the uhf stations it hopes to get onto the air in the near future:

When a cable system brings to a station's market additional signals which would not be readily available in the system's absence, it introduces competition for audience attention, and audience attention is the basic commodity that a station sells to advertisers.

Technically, FCC took two actions today:

The first represents a ruling that all CATV systems served by microwave relays or by common carriers will be required to adhere to FCC's rules to protect local stations. This represents a final decision, and it will go into effect as the relays and carriers apply for license renewals during 1966.

The second action stretches the Communications Act to assert jurisdiction over CATVs which pick programs off the air and transmit them by ground wires to individual subscribers. FCC acknowledges it has previously questioned its authority to do this, but it says it is now convinced that the act is supportable, because it is necessary to protect the commission's plan for nationwide TV service.

This assertion of jurisdiction over the off the air systems is voiced in a notice of rulemaking. FCC says it wants comment on this within 60 days.

The commission said it still welcomes congressional guidance, and it hopes Congress will decide to settle the matter with legislation. Meanwhile, however, it states that it intends to handle the jurisdictional issue regarding the off the air CATVs with the greatest possible speed, and to let the other issues in the new rulemaking proceed at as more leisurely pace.

The commission's complex formula requires CATVs to carry all stations that put a B Grade signal into the community they serve, unless one or more of the stations duplicates the programs carried by another local station which provides a better signal, or unless the CATV already has more local stations than it can carry.

The equally complex duplication formula seeks to protect station exclusivity wherever it exists within the B Grade signal contour of the local station. While the CATV cannot duplicate the local station in the area where that station has exclusivity, the CATV is not required to protect the local station in the areas where the local station is already duplicated by another TV station.

For the most part, FCC split 4 - 2 in undertaking the project, with Commissioners Lee Loevinger and Robert Bartley both expressing concern over the effort to assume jurisdiction over off the air CATVs and to prohibit duplication of local stations for 15 days before or after local broadcast.

With uhf and the various supplementary services such as CATV translator and booster stations, FCC says there is a good likelihood now that the U.S. will soon be able to provide four commercial services and an educational service for viewers everywhere. But the commission says this service must be based on local outlets and local services, and not on a handful of superstations and a nationwide network of wire.

Up till now, FCC says, CATV has inflicted relatively little damage, but the danger is increasing.

FCC notes that rating services are making an effort to measure the CATV audience, and that advertisers at all levels are becoming conscious of it.

"It is highly probable that national advertisers will in the future take much greater account of CATV operations and that estimates of adverse impact upon stations will become increasingly real.

Advertisers normally view duplication as waste for which they will not pay, and network affiliations and rates are based on the amount of unduplicated coverage a station can provide. As advertisers become aware that the purchase of big city stations may include coverage of secondary markets, it is likely that they will react.

(5) 39:50-418/5/681

CATV Ruling Affects Rival Ad Attacks

Sidney A. Diamond

In a decision that astonished almost all of the experts and it is said, surprised even the winning party, the U.S. Supreme Court has reversed two lower federal courts and ruled that CATV systems do not "perform" copyrighted program material that they pick up from regular television broadcasts and therefore they are not infringers. Putting it another way, the CATV systems can transmit to their subscribers by wire, television programs that include, for example, copyrighted feature motion pictures without the consent of the copyright proprietor and without payment for the privilege.

The Supreme Court came to this conclusion by comparing the relative roles of the broadcaster and the viewer in what it called "the total television process." Considering CATV systems in this framework, the Supreme Court majority decided that they are a part of the viewing function rather than a part of the broadcasting function. In Justice Stewart's words, "Essentially, a CATV system no more than enhances the viewer's capacity to receive the broadcaster's signals: it provides a well-located antenna with an efficient connection to the viewer's television set."

Justice Fortas was the only dissenter. His opinion written shortly before he was nominated to be Chief Justice starts with a sentence that invites quotation and undoubtedly will be repeated many times in differing contexts. He wrote: "This case calls not for the judgment of Solomon, but for the dexterity of Houdini." That remark was prompted by the fact that the law under which CATV operators were claimed to be committing copyright infringement had been passed back in 1909, when television was not more than a topic for science fiction writers.

Non-Infringing Uses Encouraged: What bothered Justice Fortas was that, to use his own words again, "The operations of CATV systems are based upon the use of other people's property." The New York Times said in an editorial that the decision "comes close to legalizing a form of piracy." The majority of the Supreme Court reached that result by construing the 1909 work "perform" in such a way as to exempt the CATV operators from any copyright responsibility.

The policy considerations underlying the decision are quite clear from the majority opinion. Justice Stewart points out that the law does not give the copyright proprietor control over all uses of the copyrighted work. It lists certain specific exclusive rights including the right to "perform" and, if a person puts a copyrighted work to a use that is not on the list, he is not an infringer. But which way should the interpretation lean in a doubtful case? Justice Stewart tells us indirectly in a footnote by quoting, with evident approval, Professor Kaplan of Harvard Law School: "Use short of infringement is to be encouraged."

This kind of policy statement has a familiar ring to those who follow the trends in Supreme Court decisions. The theory appears to be that copyrights and patents are monopolies that constitute exceptions to the general rule of free competition and therefore must be narrowly construed. If something is not protected by a patent or a copyright, everyone is free to copy or use it without legal liability. This ultimately is in the best interests of the general public, according to the theory, because the free flow of ideas is not inhibited and competition is increased.

Critics of the extreme version of this theory are disturbed because the Supreme Court has left little if anything that can be done to stop what traditionally has been considered unfair competition.

Sometimes this takes the form of copying a distinctive design feature that the public has learned by exposure to associate with a specific manufacturer, so that the consumer is misled or deceived by the imitation. Sometimes it takes the form of appropriating the results of someone else's services, perhaps by electronic means as in the CATV situation, and using them as one's stock in trade, a practice variously known in the legal literature as "reaping where one has not sown," "living by the sweat of another's brow" or more simply, "taking a free ride."

Not Inventive Enough for a Patent: Just four years ago, the Supreme court severely limited the possibility of obtaining legal redress for this kind of unfair competition in a pair of decisions that dealt with "knock-offs" of lighting fixtures. These were the kinds of devices, the Supreme Court said, that could be protected by patents if they were sufficiently inventive in character. Since they failed to meet the tests of patentability, however, they could be copied freely. This kind of copying is to be encouraged as a matter of federal policy, so that it cannot be halted by court order under state law.

Professor Oppenheim of the University of Michigan law school already has called attention to the doctrinal relationship between the Supreme Court's approval of this kind of copying and its approval of the CATV system's free ride on the material broadcast by television stations. The same principle explains the ruling of the federal court of appeals in Boston in the "Paladin" case, in which the originator was denied any relief because the printed calling card he distributed by the thousands—which carried the name "paladin" the slogan "Have Gun Will Travel" and the characteristic chess knight design—could have been copyrighted, but it wasn't. This, according to the court, made the whole concept available for copying by anyone.

Traditional Ethics Lose Meaning: The Supreme Court decisions of four years ago, the lower court decisions like "Paladin" that have applied the same basic rules and now the CATV decision all point in the direction of justifying types of behavior that in the past have been characterized as commercial piracy. Coming, as they do, at a time when advertising has been getting increasingly bolder in mounting direct attacks against competitors, these decisions are likely to encourage further breakdowns in traditional standards of business ethics.

Many observers believe that the pendulum has swung too far and that the new looser definitions of what constitutes unfair competition will not, in the long run, be in the best interests of business or the consuming public. It obviously is too soon to tell whether the pendulum will swing back again, possibly with the help of a proposed new federal statute dealing specifically with unfair competition.

Meanwhile, the CATV decision also is affecting the long overdue revision of the copyright law. There is very little incentive now for CATV operators to support a new copyright statute; they are better off relying on the Supreme court's interpretation of the old one.

There are other interested groups that have indicated less than complete satisfaction with the copyright revision bill passed by the House of Representatives and presently stalled in the Senate judiciary committee. If these groups should oppose revision, the new law may be delayed still further. At the moment, it is clear that final congressional action cannot possibly take place during the current session, which means that fresh bills have to be introduced when the next Congress convenes in 1969. The U.S. then will have the dubious distinction of living with a 60-year-old copyright law, probably the oldest in the world.

(6) 36:7015/3/651

Broadcasters Oppose FCC Interference in Programming; Like It in CATV Rule
Stanley E. Cohen, Washington Editor

Politics makes strange bedfellows, and so does self interest.

That may be the inescapable moral in the tangled alliances that have developed from recent action by the FCC dealing with network control of TV programs and with CATV competition with broadcasters.

The commission's proposal to restrict network ownership of TV programs is supposed to provide more bargaining power for advertisers and program producers. If advertisers and program producers welcome this commission move, they are keeping their opinions to themselves.

Most advertisers who are expressing themselves are siding with the networks. The commission's proposal, they say, is unworkable, and a dangerous invasion by the government of the

program area. The Association of National Advertisers presently is trying to reach a consensus upon which to base an official policy toward the proposed rule IAA, April 29.

The opposition that has developed against the so-called 50-50 rule is causing considerable amusement in some FCC quarters, for a substantial number of experienced FCC staff members were skeptical from the beginning.

After an early draft of the proposal was leaked to interested parties last January, the opposition within FCC collapsed. "Anyone who was against it was tagged as 'pro-network'," one of the "I-told-you-so" faction says.

To them the 50-50 rule is an act of futility, like the long struggle to end option time. "In the option time fight, networks screamed as if the world would end. Now option tie is gone. Has anything changed?

"The 50-50 rule might move the chips around--reduce network profits, make program producers more prosperous, give advertisers more bargaining power," they contend. "But programs would be the same.

"It is really not a matter of public interest. Perhaps networks do exercise undue power over advertisers and program producers. Why not leave it to the Justice Department?"

At the meeting of the American Association of Advertising Agencies, last week, most participants agreed that FCC's 50-50 rule tampers with the existing scheme of things.

Meanwhile, here in Washington, broadcasters have been praising FCC for stretching the Communications Act to cover a finding that TV stations should be protected from the competition of community antenna TV systems.

In the strange alliance that has developed over the CATV issue, Maximum Service Telecasters, which speaks for some of the industry's leading members, hailed the decision to assume jurisdiction over CATV as "significant progress in the public interest."

But former FCC Chairman Frederick Ford, now chairman of National Community Television Association, felt the decision showed that FCC is "broadcast oriented," with a "built-in bias in favor of the status quo."

In order to establish control over CATV, FCC abandoned all legal inhibitions and explored new legal frontiers. Mr. Ford was amazed that broadcasters would encourage such a development.

"No group has been more zealous in trying to protect itself against unauthorized assumption of control and expansion of jurisdiction by the commission than the broadcasters," he lamented.

Now that the commission has taken its stand, there will be strong pressure for Congress to intervene. In the maneuvering on Capitol Hill, the commission and the broadcasters will be in the same corner.

In many respects, the commission's decision to assert the right to impose restrictions on CATV is an act of desperation. For five years, Congress and FCC have circled the crib. Now the baby has passed through adolescence, and the commission is trying to establish ground rules which should have been established a long time ago.

Until relatively recently there has been hope that broadcasters and CATV operators could unite behind mutually acceptable legislation establishing a statutory basis for regulation. As they remained deadlocked on the basic question--where TV stations should be protected from direct CATV competition--FCC finally felt compelled to cut the knot.

Commissioner Lee Loevinger who dissented, thinks the country will eventually pay a fearful price if the broadcasters leave the question to FCC by default.

In order to assert control over CATVs, the commission had to find a way to work its will on consumers who buy communications services from common carriers. In the CATV decision, FCC developed a theory that the carrier can be forced to require that its customers accept FCC's restrictions.

Mr. Loevinger points out that every business and almost every citizen gets service from the telephone company and other common carriers. "If this jurisdictional foundation is sound for CATVs, the commission may, by precisely the same technique, impose its regulations on theaters or

newspapers, on stock brokers or taxicabs, indeed on any business or person that needs and uses the services of a communications common carrier," he warns.

He thinks broadcasters will be particularly sorry that they have asked FCC to forbid CATV to duplicate" the programs carried on local TV stations.

"What the majority adopts here," he wrote, "will beget future problems and more control."

He cites a variety of situations where problems may arise because local stations demand non-duplication, then fail to carry the programs which the CATV blacked out.

"Will the commission permit these programs to be taken off CATV at the whim of the local station owner without insuring that he does carry them? It seems unlikely to me that the majority will be willing to do this. However, I doubt that those broadcasters who now clamor for a commission rule on non-duplication will welcome this new ground for commission regulation of their programming," he said.

(7) 55:13|12/24/84|

Turner zooms in on camera-courtroom fight

With U.S. Supreme Court Justice Warren Burger adamantly opposed to cameras in federal courtrooms, Ted Turner is unlikely to convince federal judges to follow their state counterparts in allowing cameras.

Nevertheless in characteristic fashion, the entrepreneur, who has established a reputation for battling strong odds, has dispatched his lawyers to ask the Supreme Court to overturn the second circuit court's decision barring Cable News Network from covering retired Gen. William Westmoreland's \$120 million libel suit against CBS Inc., Mike Wallace et al.

Robert Ross, TBS vp general counsel, tells me he figures the appeal has only a 10%-to-20% chance to get on the Supreme Court's calendar. In the event four justices vote to hear the appeal, the prospects for a win are even sligher.

And, of course, the first round of Westmoreland versus CBS will be over by the time the High Court would hear the CNN appeal.

Live from state court

CNN already has telecast more than 300 hours of live proceedings from state courts. We remember most vividly the New Bedford-Big Dan's Tavern gang rape, but the CNN cameras also were there for the Dan Rather and Carol Burnett libel cases, the battle over Groucho Marx's estate and a Miami murder case against a policeman.

Mr. Turner is young enough to care about the future. He revels in setting precedent. How could he resist taking a swipe at the federal court barriers against tv, the medium to which most 20th Century Americans turn to keep up with world happenings?

Should the Supreme Court agree to hear his appeal, Mr. Turner's company will spend an estimated \$300,000 to \$400,000 trying to establish tv's First Amendment right to access to the news being made by the third branch of our government.

At the very least, the Turner people seek to spark a public discussion that eventually will shift the tides of judicial opinion their way.

Mr. Ross argues there are crucial, long-term constitutional issues raised in the request to cover the trial to find out whether the Vietnam War commander lied to his President or whether CBS News lied about the general.

When we talked about the CNN appeal, to be formally submitted by Feb. 2, Mr. Ross said several significant sociopolitical considerations had been touched on but not fully analyzed in the lower-court decisions.

He maintains the clearly established constitutional and common-law right of the public to attend a trial is trivialized if it is limited to the physical access to the courtroom. He questions whether the court can constitutionally shut out tv if the presence of no-longer intrusive cameras and other

equipment has no adverse impact on the fair administration of justice, as determined by the judge in charge.

Mr. Ross asks whether the courts don't have a duty to modernize their rules in response to changing sociopolitical needs. He asks whether the courts should not be required to apply the "same balancing tests" to their own actions as they have historically to other branches of government.

Bother to judges

Should the Turner people get their wish, the Washington nine will weigh their request on its own merits and not simply cite the federal courts' out-of-date strictures against cameras.

Most active federal judges don't want the added bother and expense of televised trials, according to the latest check by the Judicial Conference of the U.S. In a survey, 78% of the judges agreed with Chief Justice Burger, who reportedly has warned that cameras will never enter the Supreme Court while he is there.

In turning down the most recent access request from 28 leading media companies, a committee for the ad hoc judicial conference was antagonized by one of tv's most obnoxious habits: Covering complicated stories in brief snatches and talking over what is going on in a news event.

The committee said state court experience indicates the public gets to see a minute or 1 1/2 minutes at most on the evening news from a trial that may have lasted weeks.

Judge Pierre Leval would have welcomed the cameras in the Manhattan court where he presides over the Westmoreland case if he felt he had the authority. Although he turned down CNN, he provided its lawyers with some striking arguments for the appeal to the High Court.

"Not mere voyeurism"

Judge Leval, who runs a tight ship himself, argued that Americans, whose lives are greatly affected by what happens in the courts, should have the opportunity to see how they function.

He suggested that for busy people, a two-week trial could be fairly condensed into one or two hours of informative film.

"The public interest is thus not the mere voyeurism that emerges for a sensational murder trial. It is a response to a rare debate and inquiry on issues of highest national importance," Judge Leval said of the Westmoreland trial.

"It could even be reasonably argued that the filming of this trial is more important than its decision: Historians and commentators on the war and on the press will not accept the verdict of the jury and the rulings of the judge as definitive," he said. "They will seek lessons and conclusions by analysis of the witnesses' testimony."

People in general are definitely interested in Gen. Westmoreland. When I sat in during the general's first day on the witness stand, young men of military age stood along the walls when there were no seats left in the small room. How incongruous for tv to be shut out of lawsuit about tv.

Judge Leval believes tv coverage could help restore public confidence in the courts. "We are told that the public today holds judges in rather low esteem," he said in his brief turning down CNN's entry request. "We are assumed to be lazy, biased and venal. Recognizing that I do not qualify as a neutral observer, I am persuaded this view of the federal judiciary is seriously mistaken. Perhaps this results from lack of public familiarity with court proceedings."

CNN undoubtedly will go into court citing studies from the more than 40 states with experience in televised trials.

Proponents of court coverage pull out the records for Arizona, California, Florida, Hawaii, Louisiana and Washington to argue there is no evidence to show the judicial process has been adversely affected by sight and sound coverage when there are clearly established guidelines to keep the judge in firm control and the electronic media unobtrusive.

Lindbergh precedent

Chief Justice Burger and other opponents of tv trial coverage can cite precedents for the lockout. Eyewitnesses say radio broadcasters and newspaper and newsreel photographers made a media circus out of the Lindbergh kidnap trial in the 1930s. Billy Sol Estes' fraud conviction in Texas in the early 1960s was reversed on the grounds that the cameras had prejudiced his right to a fair trial.

Federal judges have been letting videotape players into their court sessions on a regular basis to introduce evidence, but that seems to be about it. Thier ban against cameras appears to be rock solid.

(8) 37:313/28/661

Bartley Hits FCC Control of CATV in House Hearing
Protection Begets More Regulation, He Warns; Henry Defends Policy

A dissenting member of the Federal Communications Commission today warned Congress of a "Quagmire" of regulation and litigation if the commission goes ahead with its plan to assert control over community antenna TV systems.

Commissioner Robert Bartley told the House commerce committee the CATV rules promulgated by FCC last month to keep CATV out of the top 100 markets "look to the economic protection of television stations, rather than looking to the public's freedom of choice."

He spoke after FCC Chairman E. William Henry emphasized what he termed "unfair" aspects of CATV competition with broadcasters. Chairman Henry expressed fear CATV will destroy the system of "exclusivity" that exists in the market for TV programs; will wipe out many stations now serving small communities; will curb the prospective growth of uhf in larger markets; and will become the basis for nationwide pay TV.

Commissioner Bartley had a word of caution for broadcasters, "Economic protection of broadcasting begets greater regulation of broadcasting," he said. He contended the majority's judgment is based on too many "ifs."

"The fears expressed in the 1950s that the marginal small-market stations would meet disaster and demise were greatly exaggerated," he recalled. "Fears that loss of audience would reduce their revenues so much they would go dark have not materialized, in spite of the growth of CATV in their areas.

"So long as the large-market stations were merely increasing their audience potential through the extension of CATV, one heard little complaint from them. But now that they are facing some program competition in their own local markets, they too are looking under the bed for ghosts. They seem to take the position that hey do not oppose the entry of a new TV station in their market to compete with them--Oh, no! But do they fear the importation of competitive programs from another market? Oh, yes!"

He said FCC's plan to pass on CATV entry into the top 100 markets on a case-by-case basis will involve an "insurmountable" administrative burden. The CATV controversy already has consumed untold man years in debate and deliberation, he commented.

"If the commission's proposals concerning CATV are adopted, I see these staggering expenditures multiplied many fold."

While he dissented from FCC's effort to keep CATV out of the top 100 markets, he agreed that Congress should act to prevent CATV from becoming the basis of pay TV.

Concurring with the commission majority, he said he recognized that CATV systems would build audiences by distributing programs picked up from TV stations, and that his initial circulation would then provide a base for pay TV operations. The answer, he said, is to adopting a law preventing CATVs from originating any programs of their own. In this way they will function only a antenna systems, and there will be no need for extensive activity by the FCC.

Commissioner Bartley's minority view was aired as the battle over CATV moved to Congress, with the House commerce committee opening its hearings on CATV control legislation.

Chairman Henry said FCC feels it already has authority to regulate CATV, but prefers to have Congress pass a law spelling out the commission's authority.

Under the bill favored by FCC, he said, the commission will see that CATV develops as

a "supplement" to the nationwide TV service, but states and communities will retain authority over such local problems as rates and franchises.

Chairman Henry said unregulated growth of CATV leads to practices which are "unfair" to broadcasters. Defending a portion of FCC's rules which require CATVs to carry local stations, he said in some instances CATVs have "cut off" local stations from access to CATV subscribers. "This kind of CATV operation is patently destructive of the congressional and commission goal of allocating TV channels in different areas and communities," he told the committee.

Other major portions of FCC's rules prevent CATVs from simultaneously duplicating programs carried in prime time by local stations.

Without this form of regulation, he said, CATV would endanger the structure of program exclusivity which governs the TV program marketplace.

"The industry competes and pays high prices for programming on the open market," the FCC chairman explained. "It has developed a system of exclusive rights that are bargained for and paid for.

"CATV does not compete in the marketplace for the programming which is the staple commodity it sells to its subscribers.

"On its distant city signals, the CATV often brings into the local community the film package or the network program for which the local station has bargained and obtained exclusive local rights. The local station is thus deprived of the valuable rights for which it paid, and for which it has competed in broadcasting's marketplace."

He was challenged by Rep. Walter Rogers D., Tex. , who is sponsoring legislation prohibiting FCC from regulating "the reception" of radio signals.

"Isn't it true," Rep. Rogers interrupted, "that broadcasters peg their advertising rates on circulation figures which include CATV audiences, but don't pay the CATV anything for distributing their programs?"

Rep. Rogers contends FCC's plan to regulate CATV represents an effort to control "the reception" of radio signals. But chairman Henry said FCC views CATV as a system of "distributing" signals, rather than a device that "receives" them.

(9) 39:2-16/17/68|

High Court Affirms FCC's Jurisdiction Over CATV Systems

Efforts of the FCC to protect broadcasting from competition were upheld by the Supreme Court this week, when it ruled that FCC has the power to regulate CATV under present law.

The Supreme Court ruled that FCC has authority to stop the expansion of a CATV system into a new area until a hearing is conducted to determine whether the CATV expansion would hurt regular broadcasting in the area.

The decision on FCC jurisdiction, which may slow the growth of CATV in major markets is one of two important issues in a dispute between broadcasters and CATV operators. The other issue is whether CATV systems should pay royalties for copyrighted movies and other entertainment and network owned programming which the systems relay to their subscribers.

The copyright issue has yet to be decided by the Supreme Court, but both sides are hoping for some ruling on June 17, the court's final day before summer adjournment.

Vincent T. Wasilewski president, National Association. of Broadcasters, said the decision on the FCC's jurisdiction over CATV confirmed what the NAB has "always believed." The decision "will serve to reduce the areas of conflict between broadcasters and CATV operators," he said.

Frederick W. Ford, president, National Cable Television Association., said he prefers to withhold comment until the court decided the copyright issue.

Attorneys for the CATV group were not entirely discouraged by the Supreme Court decision, however. They pointed out, for example, that the ruling gives cable operators ammunition against regulation by state public utilities commissions.

The Supreme Court decision unanimously reversed a ruling of the ninth circuit court of appeals. The case evolved from the complaint of a San Diego station that the importation of Los Angeles signals by CATV systems would adversely affect the station's audience size and advertising revenues.

FCC ordered a hearing in July, 1966, to explore the impact of CATV expansion on broadcasting and particularly uhf development, in the San Diego market. FCC ordered the CATV systems not to extend their services to new areas before the hearing. The CATV operators went to court, arguing that FCC did not have jurisdiction over CATV.

Writing the court's opinion, Justice John M. Harlan noted that in 1959 FCC had concluded that CATV is "related" to interstate transmission but it refused to regulate CATV simply "upon assuredly adverse consequences for broadcasting." FCC sought congressional action to "clarify the situation," but no legislation was passed.

In 1962, FCC reevaluated the situation and decided that the "likelihood or probability of CATV's adverse impact upon potential and existing service has become too substantial to be dismissed."

At that time FCC imposed two rules on CATV systems: 1. They must transmit the signals of any station into whose area they bring competing signals; and 2. they cannot duplicate the programming of such local stations for 15 days before and after local broadcast.

In 1966 FCC prohibited CATV operators from importing anymore distant signals than those already being imported into the top 100 TV markets, unless importation was found to be in the public interest.

Justice Harlan said that the Federal Communications Act cannot be viewed "so restrictively" that it does not apply to CATV. CATV operators had argued that they are neither broadcasters nor common carriers and, therefore, were not covered by the law. "We have no reason to believe" that the law does not cover "all interstate communications by wire or radio." Mr. Harlan wrote.

The system of local broadcasting which has been fostered by the commission and approved by Congress included the subsidiary goals of "significantly wider use" of uhf channels and existing educational channels, Justice Harlan said. "The commission has reasonably found that the achievement of each of these purposes is placed in jeopardy by the unregulated explosive growth of CATV," he added.

To categorize CATV activities as intrastate "would disregard the character of the television industry," Mr. Harlan said. Although some systems intercept and transmit signals within a single state, "we may take notice that television broadcasting consists in very large part of programming devised for, and distributed to, national audiences," he said. Thus, the CATV systems, "ordinarily employed in the simultaneous retransmission of communications, have very often originated in other states. The stream of communication is essentially uninterrupted and properly indivisible," Mr. Harlan said.

(10) 40:311/3/691

CATV Leaders Show Mixed Reaction to FCC Program, Advertising Rule

The cable television industry appeared to have a bittersweet reaction this week to a Federal communication commission decision to require larger CATV systems to originate programming and allow them to carry advertising to help cover the cost AA, Oct. 27

Industry officials suggest that the new FCC rule imposes a new restriction on CATV, while not lifting old ones. They remain bitter over what they consider to be a freeze imposed on the industry

last December when the FCC proposed that larger systems should be required to obtain retransmission rights from program owners and that importation of distant signals by outlying systems should be restricted.

At present, CATV systems must receive FCC approval to carry any signals from distant stations. Several major question, including the importation of distant signals and cross ownership of CATV and other media, are still before the commission.

The industry has always had the power to originate programming and sell advertising industry spokesmen argue. However, with the new FCC rule, all systems with more than 3500 subscribers must originate programming by Jan. 1, 1971.

The question of advertising has been handled by the commission on a case by case basis in the past. There has been only one case where the FCC ruled that a system could not carry advertising. The ban, involving a San Diego system, was upheld by the Supreme Court and helped establish the FCC's authority over cable television. The FCC staff admits that the San Diego case must now be restudied, in light of the new rule.

In the FCC ruling on CATV originations and advertising, the commission said it would feel compelled to oppose any proposal aimed at preventing CATV systems from leasing channels to others for program originations or from interconnecting on a regional or national basis for any purpose.

The commission is known to be taking a new look at its ban on microwave transmission of CATV program origination, considered a major block to cable networking. Some observers, both in and out of the CATV industry, look upon a proposed merger between H&B Communications, Los Angeles, and Teleprompter Corp., New York as a first step toward a cable network.

The commission's new rule preempts the power of local governments to regulate programming when authorizing a cable system to operate within its jurisdiction. This provision has greater impact in New York, where the city has restricted the types of movies which could be shown on CATV.

The new rule, FCC stressed, would allow CATV to carry advertising to help defray the cost or originations. However, the FCC made clear, it expects a service different from television to grow out of CATV programming. The commission said it would allow commercials only at natural breaks in programming. Although natural breaks was not defined the FCC staff believes this to mean such times as the beginning or end or actual intermission in a movie-or time outs during a sports event. Programs could not be interrupted by commercials at the whim of the cablecaster, FCC said.

This limited use of advertising would not affect broadcast revenues to the same degree as unlimited CATV commercials might, the FCC said, while it offers advertisers a new and different outlet in terms of size and selectivity of audience.

The National Association. of Broadcasters, which has fought against program originations and advertising on CATV, did not comment on the new FCC rule.

However, Martin Firestone, counsel for the All Channel TV society ACTS which represents small broadcaster's said We're disappointed. There's no question about that. He said ACTS plans to ask the FCC to reconsider its action. ACTS has long had the position that cable which can carry advertising has a significant unfair, competitive advantage over local radio and TV stations, since they already have subscriptions as a revenue base, he said.

DELIVERY Frame Articles by Rank in Purity Index

(1) 53:sec2:M-1813/8/821

Pay tv goes on the prowl to seek old movies
by Bob Marich

First it vied for tv viewers, new pay tv is prowling the once uncontested domain of tv stations--the syndication program marketplace.

What pay tv is seeking is older movies and movie packages to fill schedule gaps created when pay tv extended its operating hours.

Showtime and Home Box Office, for instance, started 24-hour schedules in the past year and reached for vintage theatricals to bring into the new slots.

Many program distributors, besieged by pay tv buyers for movie products, are no managing their program inventories to permit sale of one-time syndicated movie staples to pay tv.

Distributors are beginning to write contracts for any given syndicated movie, movie package or even offnetwork series to expire the same day or at least before a given day in all markets simultaneously. After this date, such products may be sold to pay tv because syndication contracts guaranteeing exclusivity have ended.

This contrasts with the once widespread practice of having license periods vary market by market for a given syndicated program.

Under the old system, license period expiration dates were staggered and continued to be staggered as new deals were made market by market at renewal time.

The old staggered inventory system was geared to maximize syndication market program sales. The growing trend to impose common expiration dates forsakes some near-term syndication dollars in hopes of making more lucrative pay tv sales in the long-term.

"Everything we own has a common cutoff date," said Robert Morin, Twentieth Century Fox Tv senior vp domestic syndication.

"We've been doing this in a small way with a few pictures for some time," he continued. "We've freed up a lot of production now but we're waiting to see which way is the best way to go in the program sales marketplace.

"It may be to pay tv, it may be to proposed dbs [direct broadcast satellite service], I don't know," he said.

In one example of Fox's common end date policy for the near-term, Mr. Morin said a package containing almost all of Shirley Temple's vintage pictures will be freed from syndication at the end of 1985. Mr. Morin said the Shirley Temple package had been subdistributed by National Telefilm Associates but is reverting back to Fox.

Mr. Morin is also keeper of perhaps syndication's hottest property, "M*A*S*H," whose syndication contracts will all expire by the end of 1989. However, for every year "M*A*S*H" continues to produce new episodes for the network--and there have been rumblings that the cast may now end the CBS-TV series in spite of high ratings--its syndication cutoff date will be pushed back one year, Mr. Morin said.

Tv station executives say they've been offered reduced rates to allow a pay tv "window" in the middle of a syndication license period by at least one distributor. That offer appears to have been rejected "because they offer little except syndicated exclusivity now anyway," said a station executive.

While pay tv's competition for syndicated programming may seem to be a completely ominous development for tv stations, some bright spots emerge.

Regarding the trend to shorter license periods "some stations may love it because the first run of any movie is more valuable than the 10th run," Mr. W. Randolph Reiss, Paramount Television Domestic Distribution president said.

"Pay tv exposure--particularly with the newest movies--has made prices stations are paying more reasonable in general," said Steven Bell, vp general manager of KTLA, Golden West Broadcasters' Los Angeles independent.

A select few classics from Hollywood's heyday, even after many pay tv exposures, "still hold up in syndication," Mr. Bell added. "If you rest them enough, I don't think you can get too burned. This younger generation is far more movie oriented than the generation before it."

Among the drawbacks are that tv stations, accustomed to amortizing license fees on early runs of multirun contracts and showing large profits on the final runs, will find shorter movie license periods troublesome, said Paramounts' Mr. Reiss.

Earlier exposure on pay tv means tv stations buyers "have to be thinking of superstations, subscription tv and pay tv," said Barry Thurston, vp programming of the Field Communications tv station group, San Francisco. "But I think movies are still an excellent investment at this time."

From the program distributors' vantage, "I think the thing they're realizing is that pay tv turns a movie back to them after a short time," said Ronald Krueger, a vp at syndication consultant TelCom Associates.

"There's none of this seven runs over six years you have in syndication," Mr. Krueger said.

"They might sell it to SelecTV in January, Showtime in February and whoever in march. Pay tv may run a title many times but it's usually over a short period of time, after which it can be sold elsewhere," he said.

What pay tv covets most is classics of Oscar-winning caliber "They never get dated" or interesting movies of a genre, although not necessarily Oscar winners, that can be presented in a thematic package, Mr. Krueger said.

Leo Gutman, who heads a syndication company bearing his own name, said his thematic "Mr. Moto" films, starring Peter Lorre, and Charlie Chan and Sherlock Homes movies are getting pay tv nibbles.

Mr. Gutman has always had common end dates for each syndication title or package but he insists "I just like to have things neat and orderly."

Neatness apparently has its rewards.

The Entertainment Channel pay cable network said it has licensed 14 vintage Sherlock Homes films starring Basil Rathbone and Nigel Bruce exclusively from Mr. Gutman for two years, starting in January, 1983.

Serendipity is credited for the best known pay tv deal for well worn syndicated movies--MGM Television's musical classics licensed by Home Box Office and Showtime. Involved were titles from MGM's Lion I and II packages.

MGM Tv was blessed with common end dates because those movies were leased to United Artists to subdistribute a decade ago when MGM was raising money to build its casinos.

When UA returned the movies, they were free of the syndication marketplace "and we decided to create a window for cable before returning them to syndication," said MGM/UA senior vp domestic distribution Joseph Tirinato. MGM acquired UA and those casino operations were spun off into another company in the meantime.

Despite new momentum in pay tv program sales, there are some distributors who resist instituting common end date policies.

"At most distributors, syndication and pay tv sales are in completely separate departments," noted a tv station executive. "There's a conflict between the departments and the result sometimes is that common end dates aren't used by the syndication department."

Clamping down with common end dates usually costs some syndication revenue in the short term, a sacrifice some distribution executives seeking maximum profit on the next quarterly balance sheet will refuse to bear.

"Tenures in this business are perceived to be short," said one program executive.

While distributors try to keep common end date practices quiet for fear of angering tv stations, the changed movie buying habits of the big three tv networks is well known. Networks are shunning large movie packages that distributors unloaded in the past in favor of buying individual titles.

This means fewer theatricals are getting network airings, but the cream of the crop that do are usually telecast more than the two runs that were traditional in the past.

Fewer theatrical titles going to network comes at a time when shares earned by

theatricals on network have slipped in the ratings.

"Networks are now buying more than two runs so that picture can't be turned around and sold in syndication quickly," said Mr. Thurston of the Field stations.

Network telecasts--which used to be considered vital to "legitimize" a movie for the syndication market back when two network runs was the norm--are now being sidestepped by some distributors.

MCA Tv pioneered direct to syndication skipping network but not pay tv a year and a half ago for Oscar winner, "The Deer Hunter" and later, theatrical loser, "Sgt. Pepper's Lonely Hearts Club Band."

While syndication attention is mostly fixed on older theatricals sought by pay tv, it should be noted that a handful of made-for-network tv movies are also making their way to pay tv.

"From our point of view--and we've bought two so far--it's definitely an experiment," said Showtime director of acquisitions Jim English.

"The Gathering" and "Elvis," the latter earned a 40 share opposite theatricals in a hotly competitive, February, 1979 telecast are Showtime's tv movies acquired from Worldvision.

"But then everything going on here is an experiment," Mr. English said.

"A few years ago Kung Fu movies would have never been aired but we decided to try them recently," he said. "They did very well for us--better than we expected. Of course, they certainly weren't 'Rockys.'"

Pay tv seems willing to experiment and certainly will introduce new innovations after trial and error in this decade. As a result, the tv program marketplace can be expected to experience more turmoil in coming years.

(2) 53:52111/15/821

CATV operators churning over disconnects

Finding that viewers would eagerly buy as many as four pay tv services, cable operators across the U.S. last year scrambled to add new networks to their systems. But many are panicking, now that a number of those same viewers are disconnecting some or all of the services they bought.

"One out of every four consumers who subscribe to more than one pay service disconnects everything each year, and almost all who buy three or four services disconnect one or more of the channels they've purchased," said Charles Townsend, vp marketing for United Cable. "It's incredible. Can you imagine if that many loyal Heinz ketchup users stopped using that brand every year? It's very, very bad news."

According to Doug Wenger, Director of marketing, Storer Cable, "Selling subscribers multiple pay services is no problem; retaining them is. When we finally got around to looking at it, we realized a lot of it was never sticking."

Said Jerry Maglio, vp marketing, Daniels & Associates, "Disconnect rates have increased excessively. So much so that some operators are reevaluating their plans to introduce new services."

Poor marketing, false expectations and too much similarity between pay tv services are what cable operators blame for the rise in the number of subscribers who either downgrade to fewer pay channels or disconnect service entirely.

"People disconnect because we don't market correctly. There's been a complete breakdown between consumer and operators," said Jeff Knight, vp marketing, Times Mirror Cable TV.

"Many operators don't watch the stuff themselves," he added. How are they going to teach consumers to use it? The industry had been using the spaghetti method of marketing -- throwing everything up against the wall then waiting to see what sticks, and a lot of it wasn't."

In acknowledging their lack of marketing sophistication, however, a number of operators recently went back to their drawing boards. And now they are returning with a number of new strategies aimed at stemming subscriber downgrades and disconnects.

For starters, many operators, convinced that less will mean more in the end, are not trying to sell each subscriber as much as they once did. "We used to try to sell each consumer up to five pay services. Now our goal is to sell no more than three," Mr. Wenger said. "If you sell a subscriber everything and he downgrades you have nothing left to sell him, and the chances of selling him the same thing again are remote." Moreover, if a customer is sold everything, there is a greater chance that he'll downgrade in four to five months. The Storer executive added that the removal service call costs the cable operator.

In addition, the more services a subscriber takes, the greater the expectations. If those expectations are not met, the unhappier the subscriber more likely to drop everything, Mr. Townsend believes.

Another new marketing tactic that is being implemented is "program packaging."

"We're packaging services together and pricing them in such a way that downgrading to a lesser number of pay channels does not offer that great a savings," noted Agit Dalvi, corporate director of marketing, Cox Cable. A subscriber may not think a service is worth \$8, but if he is only paying \$5 Mr. Dalvi added.

Times Mirror Cable is another proponent of the program-packaging concept, but in addition to packaging, the company has initiated what it calls its "Dimension" program. All 68 of Times Mirror's variously named systems have been packaged with a common name, "Dimension," so that they can share the same print, tv and radio advertising umbrella. The company also has created its own "Dimension" program guide, and Mr. Knight believes the guides are its best retention tool.

Several executives at Daniels & Associates and others have formed a new company, American Cable Connection, to offer cable operators franchises for retail stores where consumers will be able to buy cable services, microcomputers, videodiscs, videocassette players and tv sets. Because trained professional will be selling the services and consumers actually will get a look at what they are buying, the company believes its stores will help curtail disconnects and downgrades.

Cable operators reported that the most frequent subscriber complaint concerns the duplication of movies on different pay networks, a grip the pay tv programmers continually try to refute with surveys of their own.

"The pay services will tell you that only 10% of their programming is duplicated on other networks, but they don't tell you that the 10% represents the big movies that 90% of the subscribers buy the services for," Mr. Townsend said.

He added, however, that duplication does have some benefits, such as viewing time convenience. Cable operators, he said, need to develop ad campaigns that accurately reflect that benefit.

In any event, the major programming services are fine-tuning their programming with more exclusive sports, movies, series and specials in an effort to create a more unique identity. It is not yet known whether these efforts and the new marketing strategies will pay off by getting subscribers to stick with the multiple pay tv services they buy. But Mr. Maglio was probably on target when he said, "We have an awful lot to learn to make it work. Many of us will; some us won't."

Ad-backed cable losses mount

Nearly 20 networks will lose an estimated \$150 million to \$200 million this year in gambling on the future of cable tv advertising. They are conceding those losses now as each struggles to survive until cable becomes a major advertising vehicle.

But before that happens, the nation's urban markets must be wired. In the interim, advertising executives and media analysts say a good many ventures will fail as CBS Cable did. Those that don't will end up losing sizable dollar amounts before turning profitable.

Many ad-supported cable networks have failed to meet revenue projections this year. While the Cable Advertising Bureau is projecting industry ad revenues of between \$225 million and \$250 million for 1982, ad executives and media analysts believe a more realistic figure is in the range of

\$150 million to \$175 million. Moreover, the bulk of those revenues will go to superstation WTBS, the only cable network making a substantial profit.

The shortfall has been blamed on a bad economy, unrealistic projections and 20% rate increases by the broadcast networks, leaving few extra ad dollars.

As an infant medium, however, cable's struggle is a precarious one. In order to stake claim to what a company thinks will become a viable concept, it must get into the act now or someone else will. And to sustain that concept until advertising revenues can, networks must maintain low production costs.

"It would be a lot easier if you could start a network in 1990, but the world doesn't work that way. It's going to be a very rocky road," said Gordon Crawford, media analyst for Capitol Research, Los Angeles.

"Everyone is losing money right now," adds A.G. Becker analyst Anthony Hoffman, "but they're all losing with the expectation that their competition will go away. Right now, advertisers are throwing money at cable because they'd like to see it make some inroads in order to keep a lid on the rising cost of network tv. They know they are paying too much," he said.

Furthermore, as the number of cable networks getting into the act increases, the more confused advertisers get and the less eager they are about moving into new ventures. Cable ad revenues this year will top 1981 revenues by about \$50 million, but many potential sponsors are more inclined now to take a "wait-and-see attitude," said Ira Tumpowsky, vp group supervisor at Young & Rubicam.

The glut of ad-supported cable networks, offering everything from 24 hours of live weathercasting to around-the-clock health advice, also has created a fierce fight for space on cable systems. That being the case, new cable networks, unlike their predecessors, cannot offset any of their losses by charging cable operators for carrying their services. On the contrary, most new services have had to woo operators by paying them a per subscriber fee or offering marketing dollars. These competitive tactics even have forced some of the older networks to cut rates or offer compensation.

In addition, the recent copyright ruling increasing cable operators' fees by nearly 4% for imported distant broadcast signals might prompt operators to rechannel those funds to cable networks.

Entertainment & Sports Programming Network already discontinuing its payments to cable operators and may consider charging them for the service if excessive losses -- expected to hit \$20 million this year -- continue to mount. USA Cable Network, which had announced a phaseout of its charge to cable operators, also is reconsidering that move.

But while cable programmers would like to see more support from cable operators, they more readily accuse advertisers of a lack of commitment to their cause. "Agencies are still trying to buy cable like broadcasting. It's a different medium and they aren't using any creativity in it," said Ron Castell, vp marketing for Group W Satellite Communications, a partner in Satellite News Channels.

Those who don't support cable now for what it can be in the future, Cable Health Network president Jeffrey Reiss warned, will end up paying a high price for the medium's ability to deliver "a targeted, upscale and more loyal viewers.

For now, however, several agency executives don't see the value in spending dollars to create original messages for tiny narrowcast audiences. "We're trying to reach as many people as possible for the smallest amount of money," said Len Sass, vp corporate director of network tv programming, Kenyon & Eckhardt. "If something creative appears on one of the networks and nobody sees it, it might satisfy our creative director, but that doesn't move product," he said.

Yet Madison Avenue maintains it's eager to see cable prosper. As Hadassa Gerber, senior vp at McCann-Erickson, put it, "We want cable to survive. We're losing broadcast network shares, but we can't support 20 channels."

(3) 54:213/14/831

Interference at the movies?

Even though local television station profits continue to be among the strongest of any industry -- with record prices being paid for stations, attesting to the ongoing prosperity of local broadcasting -- the future picture is filled with potential interference and uncertainty.

Stations, especially independents, are worried that the primary sources of programming -- their lifeblood -- are in jeopardy. The networks' push to repeal the FCC's financial interest rule threatens to curtail local stations' current access to valuable off-network programming.

First-run syndication programming remains a high-risk venture with only a few program suppliers besides Paramount the only really viable players.

Finally, stations fear that pay-cable services such as Home Box Office, Showtime and The Movie Channel are eroding the performances of current movies and seriously threatening the availability of the future product. While there has been much said and written about the financial interest rules and first-run programming, pay tv's impact on local movies in syndication has become a heated topic of discussion. Most stations view pay tv as another link in the distribution process. Not too long ago, a station could buy rights to a movie after it had played at theaters and on network tv.

Now there is another tier: Movies are sold to the pay channels, which drives up prices and draws away audiences. Everything a station manager hears indicates pay tv is a threat to his business. Even the networks appear to be intimidated by the pay services and are pulling back from movies.

In fact a positive future for movies in local broadcasting is actually being enhanced by the networks reaction to the presence of pay tv. The networks are buying fewer movies and taking fewer runs, which is amazing considering that if the pay tv channels proved anything, it is that Americans have a healthy appetite for movies. So how can the networks relinquish their most valuable programming? Why give up on movies when the network rating declines have not been great as, for example, the declines for situation comedies or drama series? Recently NBC would not allow HBO to outbid it for the rights to the series "Taxi" yet it won't bid competitively for movies.

With all of this negative reinforcement many stations managers find themselves in the "me too" syndrome. The other guy is worried so I should be too. There is only one thing wrong with this line of thought - it isn't based on reality.

While pay tv is changing the economics of movie syndication to the point that many syndicators are having difficulty justifying the sale of their film properties to stations at all the stations should not passively give up on movies. To back away from this proven product and follow in the footsteps of the three networks is absolutely foolhardy. Abandoning movies because their impact might be dissipated by their exposure on pay tv is quite simply unnecessary panic.

To begin with movies are still performing well for local stations - especially independents. Ratings across the country are higher this year than in the past as stations continue to learn how to better schedule their movie packages and develop more effective promotions.

Stations are allowing themselves to become victims of media hype over the exposure problem on the pay channels without investigating the facts. The entire pay tv universe is approximately 20 million subscribers with HMO and Cinemax taking the lion's share and The Movie Channel and Showtime dividing up most of the rest.

However because there is a high duplication factor in pay services the actual number of different pay tv households is estimated to be closer to the 12 million or 13 million level. Therefore a movie running on network tv only delivering a 15 to 20 rating would reach more homes than the entire "real" pay tv universe. In addition no movie ever reaches the potential audience of a pay channel.

Bearing this in mind isn't it unusual that when a syndicator offers to a station a movie that had three network runs instead of five he gets little additional attention for this property? However, if that same syndicator offers a movie that had not been sold to pay tv he would be much more successful in clearing the title and in generating more dollars for it from the station. As noted the facts simply do not support this emotional reaction on the part of the station.

Another thought to bear in mind is that while the pay tv universe may be increasing the total potential audience that can be exposed to a movie will be shrinking as the pay services inevitably move

closer to title exclusivity. HBO has been saying privately that within 18 months to two years all of its movies will be exclusive to its own service.

When HBO's exclusivity becomes fact the potential pay tv audience for any one particular title - even taking into consideration future growth - will be far less than the current 20 million subscriber universe.

Another factor will be that for independent and affiliated stations alike there will be less exposure for syndicated movies - so these titles will be fresher to their viewers.

Local stations through better scheduling and promotion can still gain the maximum value from movies. To be sure this reality will be played out in a different economic framework.

At Paramount we have begun offering our latest movie package -Portfolio X - on a three year license term instead of the traditional five to seven year term. Given the lucrativeness of selling to pay tv a movie syndicator has no alternative.

The pay channels can pay more for the rights to a title they will own for only six months to a year than a local station can pay for a title they traditionally owned for five to seven years.

Paramount developed the shortened licensing period for one main reason: We want to keep the syndication marketplace alive for movies. If stations lose their access to film programming - which for independents are often the greatest source for revenues - and are then hit by the repeal of the FCC financial interest rule at a time when fewer hit series are coming off network the impact on local broadcasting could be devastating.

Our position is to sell to pay tv and to syndication however for a shorter license period. The solution will probably cost us money as we could make more just selling to pay tv but we feel a stand needs to be taken.

We also believe and our research substantiates that stations do not need the full seven-year term. Station usage of movies during the last years of its contract tends to decline drastically. At the same time that we are asking stations to pay the same or even higher rates for the shortened contract, we are willing to allow them more runs.

With proper scheduling and usage a station can get more runs from a movie in less time than is currently the case. Stations realize that duplication of audiences in different dayparts is often very low. Showing a movie in daytime in July would probably not duplicate much of the audience that watched in the previous June during prime time.

The reaction from stations to the Paramount plan has been very positive although some stations do not want to be the first to break with the old way of conducting business. Others are more aggressive and realize Paramount is trying to be a realistic partner in the new marketplace.

Still others are as always slow to respond and will come around only when the industry pulls them along. Stations have to stop reacting emotionally to the threat of pay cable.

They cannot afford to walk away from movies unless they are also willing to walk away from the millions of loyal movie viewers that will be forced to turn to pay tv to satisfy their film appetites.

(4) 52:S2:2211/16/811

"From static to success: A history"

From its humble origins in the 1940s to today's 22,000,0000 subscribers cable television is finally in the ballpark of the 30% penetration figure that is the sine qua non for success in traditional television.

In a short time most of the remaining franchises will be awarded and several billion dollars worth of construction will push the subscriber number to more than 40% of television households. Also important to cable interests programmers and advertisers are the other 30,000,000 households - the potential subscribers with direct access to cable if they can be enticed to hook up to it. By 1985 the cable industry should have exposure to 80% of the population.

Cable television has become big news and big business.

But these signs of success did not come easily to the cable industry. And its history is the kind of story that should be filed under the category of American innovation and enterprise.

Technology and tenacity:

A combination of technological advances and industry tenacity has accounted for cable's success to date. Its phenomenal growth is all the more noteworthy when one recalls the obstacles it has overcome. Early bribery scandals serious economic recession denial of pole access by telephone utilities and burdensome Federal Communications rules that restricted the number of signals and types of programs carried.

Elimination of the FCC rules alone is credited with much of cable's recent marketplace gains. There were battles in the courts at the FCC and on Capitol Hill over many of these regulations. In the copyright area, for example, the industry had to persuade Congress to create a compulsory license for tv signals retransmitted by cable systems enacted as part of the 1976 Copyright Act and then cable had to fight to keep that license intact against the notion of retransmission consent.

These battles pitted a fledgling cable industry against the most powerful interests in the motion picture, sports, broadcast and telephone industries. That cablecasters succeeded stemmed in part from their persistence, their persuasiveness and their image as an underdog - a group of small "mom and pop" systems.

But this fight over copyright and other differences is far from being over.

In fact until the 1970s cable was largely an assortment of small unrelated systems predominantly located in rural areas and serving tv viewers who wanted a better quality signal. Now the cable business and hence the image has changed. In the process cable may well have reached a high water mark in its efforts to achieve a desirable balance of deregulation and protection in cable policy.

The burdensome FCC program and access rules were eliminated; efforts to impose a separations policy fizzled; the compulsory copyright license is intact; telephone company competition in cable service is still limited to rural areas; state regulation is manifested essentially in basic service rates and access requirements; alleged improprieties in franchise practices are not adversely affecting cable companies; franchise fees are capped and pole attachment rates are quite attractive.

Some have argued that any company that owns the transmission facilities has an inherent monopoly and, as with utilities but unlike broadcasters, the same company should not determine what programs are transmitted.

That is, there should be a separation between facility and information.

While the industry pressed its regulatory case technology delivered explosive new market opportunities. In 1975 Home Box Office tapped the capacity of RCA's Satcom I satellite to deliver its pay tv service giving birth to satellite connection. The connection provided cable with its crucial program link and is currently delivering a variety of new program services to cable systems across the country.

As earth station costs continue to drop and multiple reception on a single earth station becomes feasible signals from numerous satellites will be received simultaneously by a cable system. At least 20 new satellites will be launched through 1985 more than doubling current capacity.

At the same time new cable systems can deliver up to 100 channels and are capable of two-way communication. While two-thirds of the existing systems have 12 or fewer channels many are planning to expand their capacity significantly.

The intense interest in these new satellite channels by cable system owners, entertainment programmers, broadcast and other information providers suggest that cable subscribers will have access to a diverse number of choices. Until now most of the attention focused on the entertainment program services that cable delivered. In the future the expanded channel and satellite capabilities will be wedded with computer technology to deliver nonentertainment services such as burglar and fire alarm protection, utility meter reading and adjusting and most important information services such as electronic newspapers, banking, mail and shop-at-home services.

The marketplace test

With current technology capable of delivering this wide variety of program and service options the test of cable's mettle will come in the marketplace.

Cable is not the only industry aware of the new services and able to capitalize on technological advances. Nor for that matter is it alone in its uncertainty over which services the public will want and how best to market them.

The broadcast industry is developing its options with the conventional tv networks quite active in new programming areas and in developing alternative delivery options.

These include joint ventures with other entities or as implied by the CBS applications for a direct broadcast satellite berth and for a waiver of the cable ownership rules, ownership of alternate delivery mechanisms. Many broadcast group owners are in cable and they're exploring other options.

Further a variety of recent FCC initiatives are based on the premise that the information diversity will increase the number of program distribution vehicles. Specifically co-located subscription television stv licenses are now authorized while multipoint distribution services mds , low power television lptv , direct satellite to home broadcast services dbs , cellular radio and digital termination systems dts are now possible or in the cards.

This alphabet soup of transmission entities is designed to provide the potential subscriber with alternative sources of program services. While each service argues that its competitors will be short lived it is more likely that there will be a continuing broad-range menu of competing options.

Old regulatory saw

Hence cable operators will probably need a variety of market approaches that appeal to subscribers and advertisers.

Otherwise it might have its services "picked off" by the specialized carriers.

Ideally deregulation would leave all the factors of success to the market. But as with most issues deregulation is not complete.

While staving off its competitors and building a complement of programs and services cable will doubtlessly wage a continuing regulatory and legal effort. That effort is like to include preserving gains that have been made, staving off traditional competitors and issues, such as copyright amendments, and dealing with a wide variety of new unresolved issues.

Cable's major competitor in the marketplace, American Telephone and Telegraph, is also its major antagonist in regulatory legal and legislative circles. The merger of traditional technologies and services is nowhere more aptly illustrated than in the looming struggle between AT&T and virtually every other communications and data entity.

AT&T controls more than 80% of the telephone equipment market, owns the largest equipment manufacturer and largest research entity Western Electric and Bell Laboratories and controls more than 90% of the long distance revenues and most metropolitan local telephone networks.

Until recently the business of telephone equipment and service meant something different from entertainment or information or data processing. This is no longer the case.

The future telephone may be a computer and tv as well. The same information can be delivered by terrestrial or satellite broadcast or by wire or optical fiber.

A recent New Jersey court decision opened significant portions of the information data and telecommunication markets to AT&T, and the company is already reorganizing itself to take advantage of these new opportunities.

Faced with a competitor with such market penetration and diversity cable has identified a number of essential measures designed to ensure that AT&T will compete fairly.

The FCC has advocated these safeguards and the Senate has passed telecommunication legislation. The House is expected to take it up shortly.

The industry would preclude AT&T from acting as a publisher or originator of information or from providing traditional cable services such as retransmission and pay tv. It would require other services such as the computer and delivery mechanisms for Videotech to be offered only on a fully interconnected basis and through a separate subsidiary that meets requirements designed to set it arm's length from its parent.

Added to cable's difficulties with AT&T is its vulnerability to state and local regulation. While cable has achieved significant federal deregulation it is still subject to local franchising and often to local or state basic rate and access regulation.

Local regulators are bound to be inclined to step in where the federal government has left off, particularly where an important source of potential revenue is involved. Because its competitors would not be regulated similarly, cable would be at a market disadvantage.

These remaining tiers of regulation could also involve questions over First Amendment rights. Coaxial cable and optical fiber systems will be delivering more and more of the information and if regulation of cable service persists and it will barring federal legislation litigation will have to define the relationship between free speech, publishing in its electronic form and rate and program regulation.

Another unknown is whether organized objections to cable programs such as blue movies could lead to franchise restrictions or other regulatory retaliation.

Compounding this potential problem is the tradition of programming regulations such as the fairness doctrine which is justified on the basis of the scarcity of broadcast licenses. It remains to be seen whether cable's channel abundance will result in access abundance or whether a different type of scarcity the ability to obtain access will develop.

Another consideration is what would happen should the industry find itself unable to deliver on its current franchise commitments. Given the intense competition for franchises cable systems are often agreeing to unrealistic terms such as low basic rates, more capacity than may be used, free public and municipal services and rapid construction schedules. With continually escalating construction costs and the high cost of money many operators might not be able to fulfill their franchise contracts.

The high demand for capital is one reason observers say for the increased consolidation of cable system ownership by multiple system owners mso . It is also why there has been a proliferation of friendly buy-ins of msos by large moneyed companies such as American Express.

The motivation on the part of these merging companies as with all cable enthusiasts is that notwithstanding the problems the regulatory uncertainties and the difficult competition ahead, the opportunities are there for those who understand what is happening.

(5) 52:76|10/19/81|

Suppliers battle for cable meet buyers

by Maurine Christopher and James P. Forkan

Several "battles of New Orleans" were fought at the first National Cable Television Association./Cable Television Administration & Marketing Society software convention, and their weapons included sales spiels, ads in catv trade publications and promotional literature handed out at the exhibit booths.

The movie, sports, music, children's and old tv series categories were among the most numerous at the exposition's 100 booths.

Movies.

Showtime used the gathering to announce the acquisition of Filmways' "Blowout," starring John Travolta, with the summer '81 theatrical release slated for an early summer 1982 cablecast. Warner Amex's Movie Channel, meanwhile, boasted that it is closing the subscriber gap with the No. 2 pay cable network, 1,500,000 homes to Showtime's 2,000,000-plus.

Home Box Office told systems operators its plans to build on the 7,000,000-plus subscribers it now has, generating "lift" new customers while reducing "churn" consumer switches to other services or dropping out of pay . The network, which had 280 movie and specials titles in 1978, expects to end this year with 490 and said next year's move to 24 hours daily will be filled with 560 titles, and fewer reruns.

Almost half those titles will be exclusive to HBO, thanks to original productions and extensive movie prebuys. Among the exclusive titles systems were told to expect are "Endless Love,"

"The Great Muppet Caper," "American Werewolf in London," "Flash Gordon," "Carbon Copy" and the forthcoming "Ragtime," "On Golden Pond" and "Sophie's Choice."

Universal Pay Television and Janus Films joined other movie distributor here AA, Oct. 5, with Universal's 1982 titles led by "Bustin Loose" and "Nighthawks" and Janus touting the original "Blue Lagoon." New World TV said "Breaker Mourant" is among the major buyers.

Domino Productions, Los Angeles, offered systems three newly produced movies and said it is seeking co-production deals.

Many of the films showcased here came from tv syndicators, and included many titles made for the commercial tv nets. Viacom Enterprises, New York, added some offnet movies to its catv package, noting they first must complete their network syndication runs. "Playing for Time," for one, will not be available till fall '83, given its CBS repeat and syndication reruns. "Ohms" is another made-for-CBS movie, written by Gene Case of Case & McGrath.

Metromedia Producers Corp. was here trying to get systems to buy the 13-hour "I, Claudius" now in syndication after a public tv stint, the "Wild Times" and "Roughnecks" miniseries it put into first-run syndication a while ago, and a dozen old U.S. tv series dubbed in Spanish. Another syndicator, NTA, offered 310 offnet "Bonanza" episodes and touted a package of old Republic movie serials as having helped inspire the "Raiders of the Lost Ark" motion picture.

Exhibiting under the NATPE banner were Fremantle, MGM TV, Telepictures noting its new "Honky Tonk Heroes" six-part special marks its first co-production geared "for all venues" from commercial to pay to home video and Syndicast Services bringing its barter approach to catv.

Sports.

Home Box Office touted its periodic big-bucks fight nights as a good subscriber lure via free previews, such as was done with the Oct. 3 Marvin Hagler and Mike Weaver title defenses.

USA Network, meanwhile, boasted that it has the top "live, prime time major league sports" roster, led by baseball, as ESPN cited it 12,000,000-subscriber reach, long sponsor list and 24-hour event lineups and Black Entertainment Television stressed its black college football coverage, with Mobil a major account.

USA Network vp Jeff Lawenda said Procter & Gamble and Gillette representatives were among those visiting its suite from the advertising agency client side. They are showing increased interest in the USA schedule, he said, something that others at USA thought might be due to the net's acquisition by Time Inc. and Paramount Pictures. That also might have influenced the at-convention decision by Harte-Hanks cable division to sign five Houston area catv systems to carry USA Network, some as of Oct. 10. Already reaching about 9,000,000 homes, USA stands to add 200,000 potential homes within two years under this agreement.

Music

Various musical services were locked in a contest for system bookings, with Warner Amex's MTV: Music Television and Video-Music Channel the established sponsored services. USA Network is adding "Spotlight" new acts and "Live from the Lone Star Cafe" to its Night Flight rock movie late night package, with Mr. Lawenda expecting that to push the series to the \$2,000,000 billings level, J.C. Penney, Pepsi-Cola and Miller Brewing are among the Night Flight buyers.

Heartbeat Media, New York, pulled out as an NCTA/CTAM exhibitor but is said to be aiming for a first-quarter start, if it can get transponder space. With MTV limiting its format to new wave and album rock, Heartbeat is leaning toward a broader musical mix and older demographics, sources added.

In still other music-related activity, LBS Video has sold an Ian Hunter concert to MTV and is hawking "Mink DeVille at the Savoy" for cablecasting.

Donny Osmond, who forms Night Star Productions to package music specials for catv and syndication AA, Oct. 5, was at the convention, browsing the booths to see what was available.

Children's fare.

Warner Amex's commercial-free Nickelodeon and USA's sponsored Calliope remained the services to beat, but HBO positioned its Cinemax service as having strong family and children appeal; already it has topped 700,000 subscribers in potential reach.

Agency for Instructional Television's 26-week Good Stuff service is set for a Dec. 5 start via U.S.A. said the ex-CBS special "The Lion, the Witch & the Wardrobe" is due for cablecast on the CBN Satellite Network as a Dec. 9-10 two-parter. LBS Video touted several kiddie specials for cable usage, as did Satori Productions best known for its "adult" Private Screening service, which now claims 125,000 subscribers, while Far West Laboratory's Multi-Cultural Children's Television, San Francisco, put 28 series on the catv market.

A spot check of other exhibit areas showed the following activity:

Play Cable, the Mattel Electronics/General Instrument Corp. joint venture for catv, was among the most crowded suites after hours as attendees tried their hand at the videogames. Execs said Mickey Mantle has completed commercials for the new service, with Lansdowne Advertising placing the catv buy.

RCTV officials downplayed the role of advertisers in their upcoming Entertainment Channel pay service, taking their cue from earlier remarks made by Arthur Taylor in New York. RCTV may well begin sans sponsors a la ARTS, they said, or with a lesser commercial load than originally planned, RCTV's main thrust will be systems clearances, they added.

Christian Broadcasting Network execs demonstrated samples of their wake-up stanza, daytime serials and talk shows. This Virginia Beach-based network is going aggressively after advertising, having switched over this fall to a general family program schedule, mixed with a Sunday lineup of paid religion. Among the latest CBN program buys are two country, music series, "Sing Out America" and "Nashville RFD," produced by Nashville's Top of the Chart. The same producer sold the "Nightlife" series to Modern Satellite Network, also for an October start.

Southern Satellite Systems chief Ed Taylor headed the delegation to pitch his own Satellite Program Network as well as WTBS, Atlanta, on which SSS serves as resale carrier. There were cassettes demonstrating the schedule in SPN's suite plus live SPN pickups from Westar III. One of the come-ons: Cut-rate volume prices for small earth stations about \$3,600.

Post-Newsweek Distribution's Allan Peris, recently promoted to head Post-Newsweek Productions, and a staff of four were here with some things new like the George Frankle comedy half-hour series AA, Oct. 5 and "Sonya," starring Detroit psychologist Dr. Sonya Friedman, plus something old, "Agronsky & Co." available in markets where the show has not been syndicated to an over-the-air tv outlet.

Weather Channel has eight multiple systems operators, including Cox and Storer, booked for this round-the-clock national and local weather service, effective this spring. That translates into a potential 2,500,000 homes. Charter affiliates with 10,000 or more homes will get a free \$6,000 Weather Star unit to provide bottom-of-the-screen readouts of local conditions. With that comes a key-board for a local ad crawl.

Besides using their hospitality suites to wine and dine prospects while offering a comfortable setting in which to view sample programming reels, companies like USA Network and CBS Cable took some business and press contacts on Mississippi River cruises aboard a sternwheeler.

Scores of producers or distributors bought ad space in publications distributed free at the convention, as a way to call attention to their exhibit presence. One company got a jump on the rest, HBO. Its agency, Ted Bates & Co., bought an outdoor board visible on the highway leading to the convention hotels near the Superdome. The copy, visible on the highway from the airport, called systems' attention to not only HBO but its Cinemax service.

(6) 56:20112/5/851

Program guides fail to turn on advertisers

It sounds like the answer to an advertiser's prayers--a medium that reaches select, upscale consumers who zap commercials, watch movies on videocassette recorders or tune in commercial free tv.

An the medium maintains its ad message in these prime households 30 days or more.

Sounds like magic? That's the way the publishers of cable viewer guides promote their products. But despite these attributes, cable guides aren't making it in the competition for national advertising or for cable operator acceptance.

Cable tv audiences should be good advertising targets. They spend a minimum of \$10 each month for basic service, and many spend three and four times that amount for premium channels, indicating willingness to use disposable income for entertainment.

And cable operators should be good markets because they all have schedules that need to be communicated.

Yet two national cable guides have folded in the past two years, and only one cable guide has been successful in attracting national advertising. Even that magazine, the Horsham, Pa.-based Cable Guide, published by TVSM, has just begun to sell advertising to its fullest potential, executives say.

The digest-size Cable Guide next month will introduce a new rate base circulation of 6 million, 70% of which is in the country's top 30 markets. The magazine is distributed by more than 500 cable system operators.

Most publications with that kind of rate base would not have trouble generating advertising, but cable guides are unusual creatures, says Robert Dallas, TVSM's national ad manager.

"We didn't even go after Madison Avenue until we had 3.5 million subscribers," he says.

This year, the publication's first actively pursuing national accounts, advertisers include Philip Morris Inc., American Telephone & Telegraph, Eastman Kodak, Mitsubishi, the Magnavox division of North American Philips Corp., General Foods and General Electric. "We'll do \$4 million to \$6 million this year in consumer advertising," Mr. Dallas says.

Cable Guide, which charges \$49,500 for a four-color inside page, also estimates it will receive about \$4 million in pay tv ads and about \$1 million in advertising from cable networks.

Cable Guide goes to press every month with 52 pages of color, an amount comparable to TV Guide. The magazine also will start using perfect binding next month.

TVSM is by far the most successful of the handful of national publishers. Some of the cable guides have no national or local advertising and many lack the slick look preferred by big advertisers.

Many guides would like to follow Cable Guide's lead, but the cable publications business is very competitive.

"Most research indicates there are at least 2 1/2 sources of programming information available to the average cable household," says Lou Pirnik Jr., director of marketing for TV Host, a cable guide publisher based in Harrisburg, Pa. These sources include an operator-provided cable guide, TV Guide and the local newspaper.

Cable guides come in a variety of forms, including single magazines designed for a national audience such as Cable Guide, customized publications designed for specific systems such as TV Host and bill stuffers such as the new Premium Channels by Premium Channels Publishing Co., Bayshore, NY.

An increasing number of guides are sold, rather than given, to subscribers.

"This industry defies ultimate description," Mr. Pirnik says.

TV Host is available in three formats from which the operator can choose, varying in size and editorial content. TV Host has a circulation of about 1.3 million. Advertisers can segment their buys by cable system for about \$24 per 1,000 circulation. However, the magazine is just beginning to see some national advertising, Mr. Pirnik says.

Cable View, a New York-based publisher, has stayed alive by customizing its publications for individual operators.

Cable View prints everything: Bill stuffers, a magazine-style guide for Storer Communications in New York a multiple system operator with 1.5 million cable subscribers

nationally and a four-color, all-glossy extravaganza for Colony Communications, an mso in Providence, RI, with 213,000 subscribers.

The company publications have a combined circulation of 5.3 million, including bill stuffers with no feature editorial content, and charges about \$20 per 1,000 circulation.

Jerry Lyonnaise, Colony's national sales manager, says the magazine "helps us in marketing our premium services" because a top-of-the-page grid displays the premium channel schedule. "And we know subscribers are using it because they're paying for it."

About a quarter of Colony's basic subscribers and more than half of the premium subscribers take the magazine, and Mr. Lyonnaise says Colony is pleased and sticking with it. "We used to mail out four guides to some customers," creating logistical problems and high postage costs. "We are now making some money on the magazine."

That's the goals of every operator and publisher, and most believe the prospects in the field are good.

"Why was Time Inc. ready to spend \$110 million?" asks Mr. Dallas, referring to the media conglomerate's TV-Cable Week, a weekly that ceased publication last year after losing nearly \$50 million in its short life. "They were after a huge market."

The demise of TV-Cable Week was a shock to the cable guide industry; the publication had one of the greatest launches in history, with lots promotion and lots of promise. But the operators didn't buy it, and 18 months after the magazine's death, the publication remains an active topic of conversation.

"If TV-Cable Week flew," Mr. Pirnik says, "we could have coat-tailed their efforts. We were excited that Time was making a major commitment to this industry and were hurt that they went belly up in less than six months."

"Their major mistake," Mr. Dallas says, "was that they thought the thing could be consumer-driven and turned their backs on the operator. Their first cover featured a network show!"

Operators were also resistant because they expected the Time Inc.-controlled pay channel Home Box Office to be favored over competing channels.

The costs, about \$30 a year, was too high for the operators to bear and too difficult to pass on to subscribers. More successful products, such as Colony's CableView, cost subscribers only \$1 a month, which includes a small profit for the operator.

Industry leaders weren't very surprised by the October announcement that Atlanta-based Cox Communications the fourth largest mso with 1.5 million subscribers, was suspending publication of On Cable magazine with the December issue.

On Cable was an exception to most cable guides, and its editor and publisher, Peter Funt, struggled to differentiate the 8 1/2 by 11 in. On Cable from other cable guides by paying greater attention to consumer needs and features.

In an interview six months ago, Mr. Funt said, "We don't consider ourselves to be in the cable guide business." Though the magazine functioned as a guide, he said, "We're in the consumer magazine business. Others simply supply printed material to cable operators, they see advertising as gravy, but remain in the marketing support business."

On Cable's circulation 1.5 million, but five years after the magazine's 1980 birth, the competition was getting tougher. "Five years ago," Mr. Funt says, "you could convince operators to spend 50 cents a month for a quality magazine. But the whole mood has changed, and those same people--or, "more likely, their successors-- want to pay 15 cents, or do without a guide altogether."

Also, On Cable never broke into the New York market an area that would have helped solidify its position as a marketing tool, industry sources say.

Competing publishers also say On Cable's consumer-oriented approach alienated operators. For example, On Cable panned Cable News Network for firing veteran journalist Daniel Schorr. "This turned off the operator," Mr. Dallas says, "and had little value to the consumer, who doesn't know what ancillary services like CNN are anyway."

Consumers need and want a guide, Mr. Dallas says. "They connect the guide to the service," he says. "Their mental connection is "This is the cable system telling me what's on this month. And our research shows that they want more information on the cable service. They're confused, deluged and want to understand what the services are. They want an easy-to-use guide."

TV Host's Mr. Pirnik agrees. "The cable guide is to cable service as a telephone book is to a telephone. It's provided as part of the service, and it encourages subscribers to use the service."

On Cable's other major problem was its cost. Though Mr. Funt was proud of his \$5,000 covers and professional copy, the operators, even those selling subscriptions, were tentative about committing to an expensive product. While ad pages were increasing with national advertisers such as R.J. Reynolds Industries, American Express and Citibank, the magazine couldn't sell enough national ads to break even, Mr. Funt says.

On Cable charged about \$20,000 for a four-color inside page on a rate base of 1.4 million.

"You cannot have a cable guide that isn't profitable," Mr. Pirnik says. "Maybe that's an oversimplification, but a lot of people in this industry have lost track of that. Ultimately, despite Cox's capital, On Cable cost too much to produce."

As the shakeout in cable guides continues, both operators and advertisers can expect some bargains, though advertisers will not be likely to find many prospects with large national Circulations.

One potentially attractive cable guide strategy is the network that offers advertisers several options from a broad geographic base. The Cable TV Magazine Network in New York, for example, links 16 cable guides and tv publications and has nearly as big a rate base as Cable Guide, says sales manager Harvey Oshinsky.

Even the smaller Cable TV Guide Network offers a rate base of 2 million by tying together the guides for many msos. The Cable TV Guide Network charges about \$19,000 for a four color inside page.

Using networks means understanding more than circulation numbers, Mr. Oshinsky says.

"You can really pinpoint by using them [cable guides]; the whole New York area of dominant influence may not be as important to an advertiser as one particular segment of it," and by advertising in one guide that serves one system, advertisers can hit the desired segment, he says.

National advertisers, however, seem not to have a clear idea of how cable guides can be used in this way, publication executives say. Until they do, cable guides as an advertising market remain more promise than practice.

(7) 55:6415/7/841

TBS easing sting of rate increases

By Diane Mermigas

The Turner Broadcasting System is giving a reprieve to some cable-system operators carrying its Cable News Network or its CNN Headline News that had been bracing for a penalizing rate increase this summer.

In some cases, the revised rate structure will mean those cable operators will incur only half the rate increase they had expected.

The modified rate card going into effect lessens the cost burden on operators who no longer have the channel capacity to provide either news service as a basic free offering to subscribers. However, the complex rate structure discourages cable-system operators from placing either CNN or its headline service on a tier.

The Atlanta-based broadcaster announced recently that operators who have fewer than half their total subscribers taking CNN or its headline services on a tier will be charged on a per-subscriber basis. A new rate card announced last November, which was to go into effect in July, would have required operators offering either news service on a tier to pay Turner for 100% penetration, regardless of the number of subscribers.

"Under the Modified rate plan, cable operators will never pay for more than double the number of subscribers they have getting either CNN or the headline service on a tier," said a Turner Broadcasting spokesman. "We're backing down a little, but we think the end result will be losing fewer subscribers than we had figured by having to increase our rates."

Many operators complained bitterly to Turner Broadcasting about the inequities of the new rate structure, constructed to ensure the profitability of the news services. Ted Turner, the company's founder and chief, met with many of the operators over the last five months. He wants to maintain his cable services -- Cable News Network, CNN Headline News and superstation WTBS -- as basic, ad-supported offerings.

About 15% of the subscribers to CNN and Headline service receive the services on a tier. WTBS continues to be offered as a basic, free service to most cable subscribers. There are 4,764 cable systems carrying CNN and another 1,155 carrying CNN Headline News.

The revised rate structure was put in effect May 1 for all new CNN affiliates, and July 1 for all existing CNN-affiliated cable operators.

Cable operators continuing to offer all three Turner services as part of their basic package to subscribers will abide by the new rate card announced last November.

Under the newly revised rate-option agreement, operators carrying 24-hour CNN as an additional tier service will be charged 30¢ per subscriber household if they also are offering WTBS as a basic free service and CNN Headline News on any level.

Operators carrying CNN as a tier service will be charged a monthly 36¢ per household if they carry WTBS as a basic service but not offering CNN Headline service. Those offering CNN on a tier will be charged 44¢ a month per household if they decline to carry WTBS or the Headline service.

Turner Broadcasting also is offering three similar new options for its CNN Headline News.

In November, Turner announced that the cost of its CNN Headline News would be raised from a monthly 5¢ to 20¢ per home for new clients. However, systems that carried all three of Turner's cable services as part of basic cable service would continue to get the headline service free.

(8) 57:S1112/01/86I

Profit picture sends operators a clear signal

By Wayne Walley

Cable tv enters a new age at the turn of the new year as the pricing of basic cable services is deregulated.

This means that rates charged for basic services by cable operators that experience competition from over-the-air broadcasters no longer will be regulated by the government.

"Now we'll have to do business a whole different way," says Margaret Durborow, vp marketing/programming, United Cable, Los Angeles, the nation's eighth largest multiple systems operator.

Depending on how cable operators react to the freedom to set basic and pay-cable rates, the future of the premium services, particularly Time Inc.'s Home Box Office/Cinemax and Viacom's Showtime the Movie Channel, hangs in the balance.

These movie-driven channels helped attract millions of subscribers to cable tv during the boom years in the early 1980s. But now that they are being challenged by videocassette recorders, movie rental outlets, cable's new pay-per-view services and a penny-wise consumer, the drawing power of commercial-free cable has dwindled.

"With the duplication of product, high prices and the increased competition from videocassettes, deregulation could be the death knell for premium services," says Jack Heim, exec vp business development, sales and affiliate marketing at New York-based Showtime.

"Three or four years ago most people needed cable tv for good reception. The basic service back then cost \$8. Pay cost \$10. It had luster. It was the first place to see movies on tv without commercials.

Pay was worth more than all the basic cable channels combined. That's no longer true. The vcr has destroyed the previous value of premium services. We have to change that," Mr. Heim says.

To survive, the pay services have taken the offensive. They -- Showtime the Movie Channel and HBO/Cinemax -- are fighting for exclusive movie contracts, dropping prices and stepping up production of original pay tv series, specials and sporting events.

Both HBO and Showtime spent millions on aggressive marketing and promotional campaigns such as "The HBO Knockout Fall" and Showtime's "Heat Is On" to attract new subscribers this year.

However, is that enough to keep things going growing?

"The future of the premium services is the big question," says United Cable's Ms. Durborow, "We see an extensive softness in the premium services marketplace, and it could become more of a support system than a primary attraction."

The advent of pay-per-view, cable's new weapon against the videocassette rental market, also looms as a big threat to the future of movie-driven channels.

"Pay-per-view means we have to establish criteria for using shelf space as does any retail business," says Ms. Durborow. "In the past we'd load up with premium services because it was the way to increase profit margins," she says, "but pay-per-view revenues for cable operators exceed that for the premium services."

"In the future I see multi-pay-per-view channels on each system offering different types of movies. After all, we are a convenience-driven society. What can be simpler than pay-per-view?"

"My exercise today is to look at what every channel gives and adds in value and how important the service is to subscribers. Will the premium channel survive? I have faith in Time Inc. and Viacom to do what's necessary to create valuable services," she says.

Both Time Inc. and Viacom have taken a cue from The Disney Channel, the fastest growing pay service in the U.S. Launched in April, 1983, the service already has 2.5 million subscribers and boasts that it is now the main source of revenue growth for the entire pay tv industry.

"Disney has other benefits besides movies," says Stephen Fields, vp consumer marketing at Burbank, California-based Disney. "With family shows, children's programming and exclusives, whether they be specials, series or movies, it's a unique bundle of entertainment the viewer can't get anywhere else."

The Disney Channel has offered cable operators incentives to lower the channel's subscription price. It has often given free previews to basic cable subscribers, and it has used numerous joint marketing campaigns to promote itself. Once the new kid on the cable block, the service is now on the cutting edge with HBO and Showtime picking up from its lead.

"We knew we had to fix our product," says Showtime's Mr. Heim. "We've done that with exclusive movies, original series and more. Now we've got to adjust the cost and do the marketing to help people understand the value of each channel," he says.

HBO and Showtime's hard sell to the cable operators has also worked, as most have agreed to price reductions to help keep pay-service subscribers.

"We can't simply burden our subscribers by upping prices for everything," says Craig Ehrlich, vp development, Falcon Cable Television, Pasadena, California "And we can afford not to because advertising sales is proving itself."

Last year, according to Carmel, California-based Paul Kagan Associates, a tv industry analyst, local cable operators across the country brought in an estimated \$139 million in advertising revenue. This figure could rise to \$187 million in 1986.

At the same time, annual cable tv advertising billings could reach \$948 million this year compared to 1985's estimated \$767 million.

This compares to the three-network revenue projection of \$8.7 billion. But by 1995, Kagan Associates sees ad-supported cable networks grossing \$2.8 billion with another \$1.2 billion generated by local systems.

"[Growth in ad revenues] is a big step toward moving cable into the mainstream," says United's Ms. Durborow. "But we also have lots of other challenges. We need to mass-market cable so it becomes the norm.

"We'll have to be real, live marketers. We used to be guaranteed a profit. Now we'll have to be market-sensitive, get a handle on price value and run the business more efficiently."

That doesn't sound impossible. Some businesses, such as banking and airlines, have flourished under deregulation; others, on the other hand, have stumbled and never recovered.

"Cable technology has to be more user friendly and become transparent. The telephone is a perfect example of that. Instead of becoming more complex, it has to be easier and I think it will," says Ms. Durborow.

(9) 56:24/5/30/85I

Videocassette recorders in operators' arsenals
Compatibility-it's a new marketing tactic.

To remain competitive with the growing array of home electronic equipment, cable TV operators are developing technical strategies designed to strengthen the compatibility between their product and home entertainment centers, especially videocassette recorders.

A number of cable operators also are finding that marketing compatibility is increasing their sales.

According to Catherine Rutkowski, director-technical services for the Washington-based National Cable Television Association., cable operators always have recognized that cable service must be compatible with whatever other electronic equipment subscribers have in their homes. But as new, more affordable generations of vcrs have been marketed, the need for clear-cut compatibility has become essential.

According to research compiled by the Cabletelevision Advertising Bureau; New York, cable subscribers are generally more affluent than nonsubscribers; they are much more likely to purchase electronic equipment for the home than nonsubscribers, and they expect the equipment to be compatible with their cable service.

Studies project that this year, consumers will spend \$900 million to rent videocassettes for home viewing, according to Bradley Johnston, vp engineering, Group W Cable, a division of Westinghouse Broadcasting & Cable, New York. Group W Cable is the third largest multiple system operator in the country with about 2 million subscribers.

So consumers obviously are willing to make a hefty investment that they don't want devalued by a maze of compatible equipment, industry experts agree.

At the same time that the VCR industry is expanding, the market for basic, advertiser-supported cable is also.

Daniel L. Richie, chairman-chief executive officer, Westinghouse Broadcasting, says advertiser supported cable was, in 1984, "the only sector in all of television to grow in audience share-up by no less than 30%."

One important force behind this increase is the spreading penetration of cable.

Nearly 44% of U.S. TV households had cable service in 1984. At the current rate, cable services are adding about 300,000 households a month, which means penetration by 1990 could reach 58% of all TV households.

As cable companies realize that their subscribers' entertainment centers invariably will contain VCR, they are realigning marketing strategies.

According to Group W's Mr. Johnston, current cable marketing trends lean toward how easily cable services work with a consumer's other home entertainment equipment.

Otherwise, he says, "Group W would be seeking to make itself compatible with other manufacturer's products. But we're not in that business; our business is satisfying our customer, whatever sort of equipment he has. It's a subtle difference, but important, because it keeps our attention focused on our customers."

At American Television & Communications Corp., the second largest MSO with about 2.4 million subscribers, a similar emphasis is evident in the evolution of its own ad tag lines. Until recently, ATC was very product-oriented, says Steven St. Marie, vp marketing and programming.

To illustrate, he quotes a former ATC marketing tag: "Television is worth watching," a slogan that clearly highlights TV as a product, he says.

"But compare that to the new tag. 'Everybody loves something about cable,'" which he says is intended to emphasize cable as a service.

"We're marketing ourselves as retailers of a service, not retailers of a product. So as a service industry, we're trying to serve our customers as well as we can, and that includes making sure our services are compatible with what our customers need," he says.

This philosophy is also present at Warner Amex Cable Communications, New York, which has 1.2 million subscribers. Warner Amex assists consumers in connecting new VCR, according to John Charlton, senior vp sales and programming.

Like many of his colleagues, Mr. Charlton stresses the need to be "customer friendly."

Warner Amex's marketing strategy is designed to demonstrate that "we're not [viewers'] adversaries in any way, and that no matter how complicated their own setup is, we still want to be sure they're getting high-quality viewing pleasure unimpeded by technical difficulties," he says.

The simplest way to do that, he says, is to eliminate the problem before it begins by offering technical assistance to customers in their homes.

According to David Wilson, vp marketing and customer services for Viacom Cablevision, Denver, his company is taking similar, basic steps toward heading off customers' potential problems. Viacom is the nation's 10th largest MSO with about 785,000 subscribers.

For example, Mr. Wilson says, Viacom Cablevision of Long Island offers a videotape that explains wiring techniques. Viacom Cable of Cleveland offers written material covering the same subject, he says.

But efforts such as this will be unnecessary in the future if the hopes of the NCTA are realized, Ms. Rutkowski says. Four years ago, the NCTA and the Electronic Industries Association, the trade association for manufacturers of electronic equipment, agreed to set up a task force to investigate the technical problems underlying compatibility.

"Engineers and research-development people from both associations have been meeting on and off for about the past four years now," Ms. Rutkowski says. Reports on some of their findings will be released at the NCTA conference June 2-5 in Las Vegas.

The task force's main target is to get marketers and system operators to agree on a single interface design to make connection simpler.

Because these technical problems have not been ironed out, the NCTA and the EIA also are co-sponsoring a task force whose goal will be a statement to be attached to merchandise in stores, advising consumers to consider the capabilities of their local cable systems and their current equipment before purchasing new equipment, she says.

Compatibility encompasses more than technical issues. Perception is also important.

"Consider a subscriber who has just bought a VCR and doesn't realize that he can't watch one premium channel at the same time he wants to record off another premium channel, without paying for two connections," Group W's Mr. Johnston says.

After spending a lot of money for a VCR, the subscriber will not feel he's getting his money's worth from his cable, he says.

So according to cable executives, the task is to show the public that cable service and vcrs go hand in hand. A number of cable operators are working to convey this concept.

ATC, for example, has introduced the "cable store" in Shreveport, La., and Orlando, Fla. Located in major malls, the nearly 2-year-old stores offer cable-related merchandise such as MTV: Music Television t-shirts and ESPN baseball caps. A subscriber may also pay a bill there and change service.

In addition to these cable services, the store also offers prerecorded VCR movie tapes for purchase or rental, as well as a line of vcrs for rental only. Prices are reduced for subscribers.

Mike Hugunin, president of Cablevision of Shreveport, an ATC subsidiary, says the cable store is designed to enhance customer service.

"There was some concern, not just here, but in industry generally, that VCR and tape rental would erode demand for cable service," he says. "But this has not occurred. A high percentage of those who belong to the store's video club are also cable subscribers."

Another company testing the perceptual compatibility of vcrs and cable is Denver-based Jones Intercable, the 18th largest operator in the nation with more than 460,000 subscribers.

As of May 1, Jones offers new service in four test markets: Oxnard, California; Jefferson County, Colo.; the Cedarburg and Grafton areas of Wisconsin, and Wapauca, Wis.

For \$44.95 a month, the new service offers basic cable, a choice of two premium channels out of HBO, Cinemax, Showtime, the Movie Channel and the Disney Channel and a VCR.

Jones Intercable will offer General Electric vcrs, model 6010, normally retailing for \$499, with this new service. After three years, the subscriber will own the VCR.

"This test is an aggressive step to respond to the current demands of the home-entertainment marketplace," says Glenn Jones, Jones Intercable president.

"Our decision to go forth with this test marketing comes after lengthy research and integrates both the current popularity of vcrs and our desire to bolster pay service retention."

However, Jones officials have no clear-cut expectations as to how the marketing of vcrs and cable will increase sales. But, like many other cable companies searching for ways to capitalize on the compatibility of cable and vcrs-and improve profit ratios-Jones executives believe such pilot projects are needed if the cable industry is to carve itself an even larger niche on the shelf of consumers' home entertainment centers.

(10) 41:98-9/11/2/701

CATV Looks Like a lusty infant heading into fast growth era

James P. Forkan

Community antenna TV born to provide good video reception for people who couldn't otherwise get it, will by next spring have taken its first major steps into the programming and advertising spheres.

Now that advertising on CATV alias cable TV, has FCC approval during natural breaks in programming the cable men say specialization will be the name of their game. They agree that ad prices on the community -targeted medium will be below local radio and TV prices.

Between now and April 1 the FCC's deadline for mandatory live local program origination for systems with 3500 subscribers or more some 300 affected CATV operators of a total 2350 will be scrambling for program ideas and for advertisers to help defray the expenses. The number of hours, so far at least, is up to the individual systems.

Some in the CATV industry had favored a 5000 subscriber minimum like Television communication Corp.'s president, Alfred Stern, or 10,000 like National Cable TV Association chairman Ralph Demgen, which would have affected only about 50 or 100 systems, respectively.

While most systems are waiting till spring, some, like Manhattan Cable TV and TV communications, are running advertising already.

The FCC also has ruled that TV station owners who operate CATV systems in the same market must sell one or the other within three years and that the TV networks cannot have cable investment after August 1973. Still undecided is whether CATV systems can be owned by companies with radio and publishing properties. Broadcasters account for about 32% of CATV owners, print men about 10%. As yet, the FCC has not set a ceiling on how much on CATV owner can control.

The FCC has proposed that systems in the top 100 markets be allowed to import up to four distant commercial TV signals into their market, and that local uhf stations be allowed to sell advertising on those programs; the commission would like to see these systems pay 5% of their subscription revenues to Corp. for Public Broadcasting.

Not only has CATV come a long way in 20 years from simply improving reception of distant TV signals for homes hooked by coaxial cables to a master antenna, but it has edged up from 14,000 subscribers in 1952 to 4,500,000 of which the top seven systems alone have more than 2,100,000. With cable now selling interference-free reception for homes even in big cities, Quantum Science Corp.'s Samson Science Corp. research subsidiary predicts 5,000,000 paying customers by year's end and 28,000,000 hooked to 4390 systems by 1980. It also sees skyrocketing CATV subscription and ad revenues by 1980. It also sees skyrocketing CATV subscription and ad revenues by 1980. A.C. Nielsen Co.'s statisticians have estimated that the 3,729,000 CATV homes as of last November represented 6.4% of the total U.S. TV households AA, April 13 .

Subscribers pay an initial hook-up charge and then a monthly maintenance fee, generally about \$5. As channel capacity and cable services increase, Samson researchers say, the average monthly fee will hit \$5.75 in five years and \$6.50 by 1980. Connection fees, too, will grow, due chiefly to the growth of color TV set sales and original cable programming. Teleprompter now charges about \$10 for installation and \$6 per month for the first TV set, with \$2 for each additional set. It waived the connection fee during early October to lure subscribers for its newly gained Knicks and Rangers home games, provided they paid for two months of service in advance.

Regional ad dollars Big: The local and regional advertiser's dollar will be more important than the national, as has long been contended by execs like Irving Kahn, Teleprompter Corp.'s president/chairman; Charles Dolan, Manhattan Cable TV president; and Edgar Smith, CATV vp, Time-Life Broadcast. These will include retailers, restaurants, banks, theaters and newspapers. In 1968, Frederick Ford, then NCTA president, stressed CATV is not competing with broadcast TV for the same ad dollar," but rather is a natural alliance for a merchant...with no reason or desire to pay coverage beyond his own community. Mr. Ford predicted in 1966 the FCC might make CATV originate programming and carry ads.

Many observers expect cable TV-which uses non-station channels on the TV set-and the new video cartridges to cut into broadcast TV's audience within a few years. Faith that CATV will make money has been evidenced by the investments of such communications conglomerates as Cowles Communications, Cox Cable Communications, Downe Communications, Gannett CO, General Electric Co., Golden West Broadcasters, Gulf and Western Industries, LIN Broadcasting Corp., Media General, Meredith Corp. with Avco Corp., RKO General, Screen Gems, Scripps-Howard, Storer Broadcasting Co., Time Inc., Television Communications and Westinghouse Electric Co. Howard Hughes, who owns Hughes Sports Network, has a sizable interest in Teleprompter whose merger with H&B American gives it 129 systems in 29 states.

Foote, Cone & Belding is the only name in its field with a CATV interest. Katz Agency, whose Katz Radio and Katz TV subsidiaries represent commercial broadcasters, is the sole rep. Katz foresees no conflicts with its clients, said Kenn Donellon, director of industry relations. We might well represent a cable system where we're not repping a broadcaster, or we might do so for one of our clients who owns cable, he added, but it's too early in the game to say now.

Programming Plans: One way to enter cable programming is to buy a programming company, and that's what Teleprompter and Sterling Communications did. TPT purchased Filmmation Associates, which produces TV commercials and cartoon series like CBS-TV's Archie and Sabrina and

the syndicated Superman cartoons Sterling acquired Allegro Film Productions, industrial informational film maker:

Filmmation, according to John Barrington, vp advertising and pr, TPT, will produce program for its systems. It will also produce commercials for its local cable advertisers and systems "that haven't the commercial resources themselves to do voice-overs and opening and closing billboards. Asked about using syndicators' programs he told AA, We'll generate much of our own programming but the door's not closed to syndication. Mr. Dolan said Sterling views Allegro as a possible source of supply.

Sterling's Manhattan Cable TV and TelePrompTer's Teleprompter Cable TV division here each have 20,000 subscribers and are already well involved in live local origination. Last summer, Time Life Broadcast and Sterling exchanged stock, leaving Sterling full owner of Manhattan Cable and Time-Life as 44% owner of Sterling. Time Inc.'s Time-Life Films and Time-Life Video subsidiaries will produce relatively inexpensive cable shows.

Manhattan Cable programming includes "Town and Village news, and tickets for tonight entertainment guide. Uptown Manhattan's tpt exhibits community report, critics at large, government in action, Columbia U. and Harlem sports, Irish football games, Daytona 500 auto racing and Leslie the Shreve kiddie series. Teleprompter will present Garden events, including the Knicks' pro basketball and Rangers' hockey home games. Goodson-Todman Productions' CATV division also will carry these games on its Elizabeth, NJ system.

Although Messrs. Dolan and Barrington view their sports shows as their strongest ad lure for the local distributors of traditionally sports-minded regional and national sponsors, Mr. Kahn sees CATV as after more than ad dollars: We must establish dialogs to ascertain what our communities want and need...We must face up to the realities of ghetto programming, ethnic programming, controversial hot potato programming and the whole spectrum of community relations.

Elsewhere, as Lawrence Walz, National Broadcasting Co.'s vp administration for CATV services expressed it, CATV programming will run the gamut from being adventurous to simply coasting, without an FCC definition as to quantity. Two NBC systems-one in upstate NY and one California-will program under ten hours a week initially by April Mr. Walz said, with ad time likely to be sold "in certain time slots" and in certain shows e.g., local sports.

Here are some other companies' program plans: Triangle Publications-A new communications division, containing Triangle's CATV properties and seventeen has four of its 32 systems working on local ideas to comply with the FCC. It leans toward the ad concept of built-in presented by billboards, much like educational TV's allowable credits citing grants from Sears, Roebuck & Co. and Xerox Corp. Some of Triangle Stations' sports specials, advertiser-syndicated to commercial TV, have already been carried on CATV systems, a spokesman said, but without sponsor identification. The latter will start next year, he said adding, We've had endless inquiries about our syndicated programs from our own systems and others.

Down Communications-Richard Galkin, president of the Downe Broadcasting division, reported that systems in Joplin, Mo., and Canton, Oh., will start originating one hour daily. There may be a Ladies' Home Journal-inspired cooking and fashions series for cable, done in a cheaper format than planned for Downe network TV specials by Wolper Productions, he added. Most program suppliers will move into CATV hesitantly he felt, and they will lose money initially.

FC&B Cablevision-The company on five its California systems including Newport Beach, Sunnyvale, Oceanside and one in Colorado, now originates about five hours daily. Shows include Sunnyvale's Almanac interview opus and Oceanside's What's Happening Oceanside?" and Capt. Cable. The latter, a kiddie series, will be used on all FC&B systems by 1971.

TVC-Its Pittsfield, Mass, system has been originating programs and selling ad time since February. Programs include the Inquiring Reporter and a country music opus, both daily and a 15 minute talent show twice weekly. Advertisers include restaurants, clothes and record retailers, realty companies gas stations and a regional brewer. TVC said McDonald Corp.'s Pittsfield drive-in hamburger restaurant advertised a giveaway on its system exclusively and had strong response.

Reeves Telecom Corp.-Reeves has canceled plans to use CBS Enterprises local format package because of corporate changes. Shortly before leaving as Reeves' broadcast catv division president in late September, Fred Walker said the systems in Huntsville and Gadsden, Ala., had planned to accept ads but that ad and programming plans were up in the air.

Program Suppliers Appear: Among the new companies organized to sell shows to cable video are R Associates and International Tele-Cable Productions. Other companies, including Monitel Inc., and Filmtation, will provide advertising-related services as well as programming. Established programmers and syndicators like United Artists TV, Triangle and Time Life Films see some new business possibilities in CATV. Some of the program suppliers bidding for the cable trade include:

CBS Enterprises, which has not disclosed any buyers of its package plan, will provide local systems with basic scripts, graphics, camera instructions, sound effects props and set designs for Crosstalk and three other half hour shows and for the one hour For Women Only show. CBS Enterprises, including CBS syndication and licensing operations, now is under Viacom International, the spinoff operation formed after the FCC ruled the TV networks must get out of both cable ownership and domestic syndication.

At NBC, Mr. Walz said, It's unlikely that the network would follow suit since we're in on a much more modest scale than CBS. NBC's cable operations, begun like CBS in 1966, are under the aegis of the NBC-TV stations division and include five systems with 20,000 subscribers; Viacom's 12 systems list about 150,000 customers.

International Tele-Cable, in which Pawtucket, R.I. based Hasbro Industries has a major interest, will peddle formats for local CATV programming. Hasbro's \$50,000 cable test buy, begun last month, is a relatively light allocation spread over 30 cities for a year or more.

Modern talking Picture Service, NY, whose library contains over 59000 sponsored films has distributed some to CATV. Bruce Thomas, eastern sales manager, said: We haven't actively solicited cable yet other than some of the larger systems. A shortage of prints keeps us from promoting them too much. Bank of America's California film has run on 50 CATV systems as well as on 200 local TV station, he said. Others which have appeared on cable include Buick's 1968 Buick Open tournament film, Prudential Insurance's The name of the Game is baseball, Volkswagen of America's The way of the Ship, Kemper insurance's The dangerous years and coming Glass The world in you kitchen: Far Eastern Cuisine.

R Associates, Cincinnati, founded by Jerome Tad Reeves to produce only cable programs has produced its first daily half-hour series, devoted to cooking, a popular CATV show topic. Mr. Reeves formerly produced Taft Broadcasting's Dennis wholly show. Besides Parsley, Sage, Jani & Love with author Jani Gardner, the company will offer CATV other network quality programs that have appeal to local and regional advertisers, Carl Trunk Jr., R's president, said.

CATV's Ad picture: CATV's low prices and neighborhood focus make it an attractive buy. Among Manhattan Cable's sports advertisers have been American and Eastern Air Lines, American Express, Colgate-Palmolive, General Mills, Gillette, Miles Labs, RJ Reynolds Industries and Shell oil co. Another, F and M Schaefer Brewing Co., backs its cable schedules with posters in 80 cable wired taverns announcing CATV is shown here.

Monitel Inc. has sold time to seven national advertisers: Black and Decker Mfg. Co., CPC International, Campbell Soup Co., Carnation Co., General Foods, RCA Corp. and Readers Digest which owns a minority interest in the new company.

Other producers plan to sell potential advertisers differently. Nicholson-Muir Productions, Larchmont, NY program packager, hopes its CATV series will be pre-sold to sponsors who will underwrite production and distribution costs. Advertisers are being solicited for its Video Encyclopedia series on children's stories, black history, safety, self defense and ecology. Each half-hour will have four commercial positions, two for the underwriting sponsor and two for public service messages or locally sold spots.

Lad Electro-Systems, Hicksville NY is pushing in store advertising via closed circuit TV monitors which can double as security surveillance systems. Alfred Call, president, Sonic-Ad Corp.,

Farmingdale, NY called his client's system POP-TV and said advertisers can buy commercial minutes or time for short program. Joseph Lazar, Lad President is aiming sales presentations at cigarette, drug and liquor companies initially.

Two-way cable's promise: Communications between cable operator and subscriber will enable wired TV to be used for at-home shopping commercial testing and program ratings. That is the prediction of such companies as Teleprompter, Manhattan Cable, TVC, FC&B cablevision, television testing co. and subscription TV inc. Stv, south Pasadena, California, and Jerold Corp., Philadelphia see CATV being used for electronic mail delivery, facsimile publication and various security systems.

Advertisers are using FC&B systems to test commercials, according to Louis Scott, FC&B Cablevision's president. Paul Murphy, vp Television Testing, is ready to supply a 200 woman, four market in home CATV sample for advertising studies.

Armchair shopping is the cable concept about which CATV men are most enthusiastic currently. Manhattan Cable and Teleprompter will be testing this by 1971 and hope direct at-home shopping via cable will pass the experimental stages within three years.

APPENDIX C
RANDOM SAMPLE OF REJECTED ARTICLES
FROM ON-LINE SEARCH

Appendix C

Sample of Articles Matched by Cable TV Index Search But Discarded from Study
Based on Irrelevant Focus; First Two Paragraphs Provided.

DATE: 08/19/91

HEADLINE: MasterCard multiplies;
New retail partners join MasterValues promotion
By Gary Levin

MasterCard International is adding six retail partners to its ongoing MasterValues program this fall in the company's most aggressive promotional campaign to date.

The move comes as MasterCard executives strongly denied persistent rumors of a strained relationship with agency Lintas:USA and maintained they don't plan to put the \$ 45 million account up for grabs.

DATE: 08/12/91

HEADLINE: BK picks Mickey; Disney promotion leaves McDonald's out
By Scott Hume and Cleveland Horton

Burger King Corp. has crowned its strategy of linking with well-known brands by signing a promotional deal with Walt Disney Co., a longtime partner of rival McDonald's Corp.

The alliance starts its first promotion in November. That six-week holiday effort will be tied to the release of Disney's new animated feature "Beauty & the Beast," according to Burger King marketing materials obtained by Advertising Age.

DATE: 08/12/91

HEADLINE: Hachette prepares cross-media foray
By Scott Donaton

Hachette Magazines wants to stress corporate ad sales and develop strategic alliances with other media companies, and has hired two well-known industry veterans to spearhead the effort.

Paul DuCharme, 44, Grey Advertising's respected VP-director of print media, is joining Hachette in the new post of senior VP-director of corporate marketing.

DATE: 07/29/91

HEADLINE: Bell ruling rings alarm; ANPA gets ready to fight against new phone services
By Christy Fisher; Contributing to this story: Steven W. Colford, Kate Fitzgerald Allison Fahey and John P. Cortez.

A decision by U.S. District Judge Harold Greene last week allowing regional telephone companies to offer information services -- such as news by phone -- that would compete with newspapers is triggering a huge battle.

The American Newspaper Publishers Association, which has long feared the

phone companies, said it would fight the ruling. Newspapers will be "devastatingly affected should the regional Bell operating companies enter the same marketplace," said Terry Maguire, senior VP-general counsel of the ANPA.

DATE: 10/31/94

HEADLINE: Diller makes a case for his next big idea smart agents are the future, qvc chief says.

By Scott Donaton and Bradley Johnson

Barry Diller watchers may be wise to get to know smart agents.

The charismatic QVC chairman, whose big ideas tend to set off tremors from Wall Street to Hollywood, believes smart agents are the latest panacea of the new-media world.

Mr. Diller last week confirmed he is likely to leave QVC-which is developing its own smart agents-before yearend if the sale of the home shopping network to Comcast Corp. and Tele-Communications Inc. goes through. But whether he winds up running CBS or doing something else, his enthusiasm for smart agents is sure to follow.

DATE: 09/28/94

HEADLINE: Hellbent for the digital highway; Nowhere are Leaders just that as in telecommunications

by Kate Fitzgerald

U.S. long-distance telecommunications marketers are heading for the digital information superhighway, ready or not.

MCI Communications Corp. drove this idea home with its strange but riveting network TV spot last January for "networkMCI," in which 11-year-old actress Anna Paquin ("The Piano") chatted up provocative notions about the future of digital communications.

DATE: 09/19/94

HEADLINE: CBS, VIACOM may reunite NBC sale rumor mill hits high gear, Iger advances at ABC.

by Joe Mandese

CBS and Viacom are actively involved in merger discussions, Advertising Age has learned.

Such a deal would make Viacom the undisputed multimedia powerhouse. It would also be somewhat ironic given that Viacom was created 24 years ago when the Federal Communications Commission's financial interest and syndication rules forced CBS to divest its program ownership and distribution assets.

DATE: 9/5/94

HEADLINE: 5 Hottest Radio Markets 4 Washington

by Steven W. Colford

As a radio market, Washington enjoys a wealth of positives-affluent audience, extensive commuting and distinct ethnic population segments. But more than anything else, it enjoys being the nation's capital.

Silicon Valley will pitch and yaw like a roller coaster through economic boom

and bust, but the federal government remains a constant; in the best of times, it's busy and growing, just like in the worst of times. When economic signs are bad elsewhere, they're so-so in Washington; when they're good elsewhere, they're great in Washington.

DATE: 07/29/91

HEADLINE: Rustling up jeans ads; Major marketers gallop into fall on new campaigns by Pat Sioan and Marcy Magiera; Christy Fisher contributed to this story.

It's back in the saddle again for jeans ads.

Levi Strauss & Co. begins the bulk of its back-to-school advertising this week, when it breaks an estimated \$ 20 million, yearlong campaign for 501 jeans on network, spot and cable TV.

DATE: 8/1/94

HEADLINE: Retailers open doors wide for co-op nearby out-of-home venues notch the deals.

by Riccardo A. Davis

Marketers are snuggling up to retailers to build out-of-home co-op advertising.

Del Labs' Sally Hansen division and Levi Strauss & Co. are among national brands pooling increased ad dollars with local retailers by using outdoor boards, transit shelters and bus panels to drive in-store traffic and advertised specials.

DATE: 07/18/94

HEADLINE: CAROL WRIGHT HEATS UP COUPON WAR

by Kate Fitzgerald

Carol Wright, whose face has graced Donnelley Marketing's direct mail coupon programs for more than 20 years, has a new, competitive gleam in her eye.

Hammered last year by rising competition and pricing pressures, the Oakbrook Terrace, Ill.-based Carol Wright program has recently gotten a face-lift and this year is testing new distribution channels.

DATE: 07/18/94

HEADLINE: TV set maker will build boxes, too.

by Bradley Johnson

If Thomson Consumer Electronics has its way, consumers in the future will have their pick of interactive-ready TV sets-and they'll pick a Thomson brand.

Thomson, the leading TV set marketer in the U.S., made a move into the interactive arena last week through a joint venture with Sun Microsystems, the world's top seller of computer workstations.

DATE: 07/15/91

HEADLINE: Media reassess as boomers age

SERIES: Second in a series, Next: A mini-baby boom a-borning?

by Scott Donaton, Contributing to this story: Joe Mandese, Alison Fahey and Christy Fisher.

Jann Wenner's Rolling Stone had to make a key decision: whether to age along with its readership, graying baby boomers who viewed the magazine as a voice of their generation, or to abandon them in favor of a new crop of teens and college students.

The magazine greedily chose both, a decision VP-Associate Publisher Dana Fields now credits for Rolling Stone's continuing success.

DATE: 05/02/94

HEADLINE: Speed & ease drive store of the future;

Package goods to come from on-line service as grocery to focus on fresh food
by Jeffery D. Zbar

The year is 1998. A busy executive returns from a harried day at the office to a house full of hungry kids and a kitchen full of dinner opportunities, the latter thanks to a high-tech grocery system that lets consumers shop in a variety of quick and easy ways.

To keep her kitchen stocked and shopping time minimal, she orders package goods from an on-line service at her office.

DATE: 04/25/94

HEADLINE: BRACING FOR D-DAY + 50;

Media, marketers will be among the thousands commemorating start of Allies' W.W. II invasion

by Leah Rickard and Jeanne Whalen, Contributing to this story: Joe Mandese, Marcy Magiera, Ira Teinowitz and Dan Lippe.

They'll be coming by the thousands -- by air, land and water -- to occupy a stretch of beach in northern France on June 6.

It will be the 50th anniversary of D-Day, and the events are building to what could become one of the biggest commemorations of one of the fiercest battles in history.

DATE: 04/11/94

HEADLINE: Dose of reality cools off info superhighway deals

by Joe Mandese for bureau reports.

An Advertising Age roundup

Construction of the information superhighway has shifted from a hyperbolic vision of digital bits and bytes to a pragmatic view of reality bites.

The reality check comes from the collapse of several big financial deals in the telecommunications industry, particularly last week's undoing of a \$ 4.9 billion joint venture between Southwestern Bell Corp. and Cox Enterprises, as well as a federal judge's rejection of AT&T's \$ 12.6 billion bid to acquire McCaw Cellular Communications.

DATE: 07/15/91

HEADLINE: Golf Boom fits carmakers to a tee
by Raymond Serafin and Cleveland Horton

Golf is the boom sport of the 1990s for auto marketers.

As growing numbers of Americans head to the links, automakers are close behind sponsoring tournaments and touring pros, and arranging local golfing events.

The demographics of golfers -- affluent and highly educated, with baby boomers and women leading the recent growth -- are just part of the lure. Marketers say many golfers care passionately about the game, opening them up to emotional attachments to brands associated with the sport.

DATE: 3/28/94

HEADLINE: Ramming head on into owner loyalty; For Dodge, breaking Ford-Chevy chokehold on pickups means heavy emphasis on features
by Kim Kinter

Chrysler Corp. executives thought they had a winner when they introduced their completely new Dodge Ram full-size pickup truck last fall. But they also realized it would be a tough sell.

In addition to promoting the new Ram's features, Chrysler faces the challenge of capturing consumers in a market notorious for brand loyalty.

DATE: 3/21/94

HEADLINE: Setbacks on the superhighway; A status report on who's testing what in 1994, the year of interactivity
by Kate Maddox

Although the interactive age has suffered several setbacks in recent weeks, 1994 still will be the year we start to see the first glimmers of its potential.

Despite the failure of the historic Bell Atlantic/Tele-Communications Inc. merger and the delayed launch of Time Warner's Full Service Network, few doubt interactive TV will eventually become a viable business.

DATE: 3/21/94

HEADLINE: Publishers embrace new-media projects; But will have to wait several years to see return on investment
by Debra Aho

The interactive gold rush is on for magazine publishers, but it will be a long time before they strike it rich.

Nearly every major publishing company has installed an interactive "guru" whose job is to guide the company into online services, CD-ROMs and, eventually, interactive TV.

VITA

VITA

Dale A. Brill began life in Joliet, Illinois, on November 3, 1964, born to Mildred and William Brill. His father entered the U.S. Air Force before graduating from high school to serve in the Pacific Theatre during World War II. His mother graduated from Harper High School and waited for her future husband to return from war. Learning was always a priority for all four of Millie and Bill's sons.

Between 1964 and 1996, Dale sat in classrooms in Lockport, Illinois; Winston-Salem, North Carolina; Springfield, Illinois; Clemmons, North Carolina; Hickory, North Carolina; and Knoxville, Tennessee. He was educated in Ely, Minnesota near White Iron Lake; Vic Crews' baseball field in Lewisville, North Carolina; Lutheridge in Arden, North Carolina; the Theta Chi Fraternity House at Lenoir-Rhyne College and Catawba Memorial Hospital, both in Hickory, North Carolina.

In August of 1992, he entered The University of Tennessee, Knoxville and in August, 1996, received a Doctor of Philosophy degree in Communications. He is presently employed as an Assistant Professor of Communication at Boston University.