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November 20, 2000

Volume 17, Issue 47

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Katz Media Group restructures

Katz Media Group is splitting off representation of Clear Channel's (N:CCU) 1,200 radio stations into a new sales structure which will be independent of Katz Radio Group (KRG). It's a move designed to assure other clients that O&Os aren't getting preferential treatment. Clear Channel has owned Katz Media Group since merging in AMFM and last year transferred all Clear Channel stations which had been repped by Interep (O:IREP) into KRG.



Meanwhile, **Stu Olds** has gotten the nod to move up from President of KRG to fill the long-vacant post of CEO

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at Katz Media Group, putting the 23-year radio rep veteran in charge of TV and Internet, as well as radio. He'll be joined in the executive suite by Senior VP Carl Butram, formerly President of Eastman Radio.

Olds' promotion 11/14 by Clear Channel Radio Pres./COO Kenny O'Keefe came a day after Katz restructured its radio rep firms to separate Clear Channel Radio Sales (CCRS) from KRG.

CCRS will be headed by President Mike Agovino, who will report directly to Olds. Also reporting to Olds is Steve Shaw, the new president of Katz Radio Group. Under KRG will be two rep companies for Katz's independent radio clients: Katz Radio, headed by President Mark Gray and Christal Radio, headed by President Tucker Flood, with both reporting to Shaw. Both Gray and Flood moved up from VP positions at their respective rep firms.



Agovino

All former Eastman and Sentry clients (except Clear Channel) are being moved into either Katz or Christal and the two rep firms have ceased to exist. Katz Hispanic Media, which has both radio and TV clients, will continue to be headed by President Laura Hagan, who will report to Olds. Katz Dimensions, the in-house sales and marketing

firm, will continue to be headed by President Bonnie Press, and service all Katz Media Group divisions. Also reporting to Olds



Butram

are Katz Television Group President Jim Beloyianis and Katz Interactive Marketing President Gerry Boehme.

Although the new Katz structure has combined five rep firms into three, the company still has five sales teams selling national spot advertising for client radio stations. Within CCRS there are three separate sales teams. CCRS Team #1 (that's how Katz is identifying each) is headed by President Bob Turner, who came to Katz when Clear Channel moved its former boutique rep over from Interep; CCRS Team #2 is headed by President Bob McCurdy, former President of Sentry; and CCRS Team #3 is headed by President Jeff Howard, who had been GSM of Eastman.

Another key executive, Katz Radio VP Bill Fortenbaugh, had already announced plans to retire at the end of this year.

Olds told RBR that Katz Media Group is in the midst of physically separating the staffs of Clear Channel Radio Sales and Katz Radio Group to emphasize to current and potential clients that their representation is being kept separate from that of Katz's parent company, Clear Channel. In

New York the two units are on different floors and similar divisions are being implemented in all but a few of the smallest regional offices.

With that corporate wall erected between the two radio sales units, Olds will be actively recruiting new clients. "I cannot imagine that any independent client out there would not want to be represented by two of the best sales organizations in the business, Katz and Christal. We've already had some calls from people who want us to come and talk with them," he said. "We have committed to our independent clients that we will not do that until we get closer to the middle of next year because our commitment is to make sure this transition goes extremely well for them and that we get them up and running and make sure there are no glitches before we go out and expand the base."

Olds says CCRS, with three



Shaw

sales teams, will have about \$900M in annual billings, and Katz Radio Group, consisting of Katz Radio and Cristal Radio, will bill over \$600M. KRG's clients include, among others, Cox Radio (N:CXR), Bonneville, Radio One (O:ROIA), Saga (A:SGA), Journal and a portion of Infinity (N:INF).—JM

Congress back in session

Congress returned to Capitol Hill 11/14 for its lame-duck session. However, only minor bills will be passed. Members were hoping to finish up business before Thanksgiving, but with the uncertainty over the outcome of the presidential election, passing major bills is impossible. "Obviously, we thought the best way to proceed was to get down to work this week and get it done before Thanksgiving. But there's a lot going on and a lot of distractions and we understand that," said **Jacob Lew**, the White House Budget Director.

Even though Sen. **Rod Grams** (R-MN) lost his re-election bid, his bill to require third adjacent channel protection by LPFM stations is still attached to the appropriations bill for the Departments of State, Justice and Commerce. Broadcasters are all anxiously awaiting a resolution in the LPFM battle, but since a resolution passed 11/14 will keep all government agencies open until December 5th, they will have to continue waiting.—ED

People meters ready for US test

300 people in the Wilmington, DE market will be the first Americans to carry Arbitron's Personal People Meters (PPM), following a test in Manchester, England that's been labeled a success. Most of the 38 radio, eight TV stations and 25 cable TV channels in the Philadelphia area that will participate are already broadcasting the inaudible tones that the PPM records. Also, new software to eliminate the "echo effect" that

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RBR News Briefs

GEICO cutting ad budget

One of radio's most loyal advertising clients is paring back ad spending. Berkshire Hathaway (N:BRKa & b) CEO **Warren Buffett** said the company's wholly-owned GEICO insurance subsidiary would reduce its advertising budget "somewhat" because a boost in advertising in recent months hadn't snared as many new customers as had been hoped. He also noted that GEICO's ad spending would remain at an "extraordinary" level compared to its competitors in the auto insurance business.—JM

SurferNet signs Journal Broadcast stations

SurferNetwork.com, a provider of streaming, targeted audio ad insertion and content distribution for websites, announced an agreement 11/14 to stream 32 Journal Broadcast Group stations. The streaming rollout begins with Journal's four Knoxville, TN stations: WWST-FM, WMYU-FM, WBON-FM and WQBB-AM.

SurferNetwork and BroadcastAmerica.com announced a letter of intent to combine the two companies, pending BroadcastAmerica's Chapter 11 reorganization. The combined entity, BroadcastAmerica.com, will have close to 1,050 contracted streaming stations.—CM

Entravision adds directors

Entravision (N:EVC) has added two new members to its Board of Directors, bringing the total to nine. The new additions are former US Rep. **Esteban Torres**, who served 18 years in Congress as a Democrat from California, and **Michael Rosen**, a private investor and former mutual fund manager.—JM

some Philadelphia DJs have complained of is expected by 12/1. Look for the first results of the Wilmington test in early 2001, with a larger-scale test to follow throughout the entire Philadelphia radio and TV market (Wilmington is a separate market only for radio).—JM

ABC ends relationship with Drudge

A big surprise to many in the industry: ABC Radio Networks has, in effect, fired syndicated online news gossip columnist **Matt Drudge** by not renewing his 18-month contract that began

7/99. The somewhat controversial decision came down from above ABC Radio Networks President **Traug Keller**. ABC Broadcast Group President **Bob Callahan** made the decision, as reported in *The Washington Post* 11/13. The Sunday night show ends under ABC syndication next month.


Controversial? Well, the show that has been cleared in 135 markets, nine of the Top 10, was described in the *Post* story to be on the fast track to move from weekends to nightly. His show was rated #1 in the time slot on WABC-AM NY, and they want to

keep him, according to PD **Phil Boyce**, regardless of the syndicator. However, good ratings and good clearances may not be enough. ABC says the program only made \$400K per year.

ABC spokesperson **Julie Hoover** stresses to *RBR* Drudge was not fired, per se: "One of the points that really didn't come out in [*The Post*] was that we simply did not renew his contract. This really doesn't seem like a hot area to program—Sunday night Talk shows. They just don't do that well, and so for the time being, once Matt Drudge goes off the air, we'll just probably not do

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anything for a while and then consider what our options are."

But what about the mention that Drudge was slated for weeknights? "It was an idea that had been floated. Neither side was truly enthusiastic about it, including Matt Drudge. Neither side thought this was the greatest thing since sliced bread. Ultimately, ABC Radio Networks decided that evening talk shows simply were not a good business—it didn't matter if it was Sunday night or weeknights. It simply was not a good business. So the decision was made that even doing it during the week was not a good idea."

The *Post* quotes Drudge as questioning ABC/Disney's motives and claims ABC's O&O stations want the controversial columnist to continue the show even without the network's sponsorship: "I see it as punishment for daring to report on ABC's activities," Drudge said in the article. "The whole notion that this is a political payback for my Web reporting is an explosive accusation, but I'm willing to make it."

Drudge had indeed dared: The *Post* reports Drudge called "ABC Monday Night Football" Executive Producer **Don Ohlmeyer** a liar; obtained the manuscript of a book for Disney's Talk Miramax "The Insane Clown Posse" imprint, saying it contained sexual information about some investigators involved in President **Clinton's** impeachment; and included Disney Chairman **Michael Eisner** as one of "the latest incarnation of vampires" who "have sucked the blood from the fourth estate, leaving behind infotainment formal-

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dehyde," in his "Drudge Manifesto" book.

RBR observation: We doubt that ABC would drop Drudge over the above issues. \$400K is not a lot of money for a net that size—weekend programming is notorious for not bringing in the bucks. What we do wonder is why ABC Radio Networks President Traug Keller wasn't the decision maker here. If Drudge doesn't self-syndicate, you will probably see another network pick him up real fast: "Matt Drudge is a talented on-air individual creating compelling radio. We would be interested if he is available. Many of our affiliates carry his program with good ratings results," Premiere Radio Networks President/COO **Kraig Kitchen** told *RBR* 11/13.—CM

Study identifies typical "streamie"

According to a new MeasureCast/Harris Interactive study, the typical streaming media consumer is a 36-year-old white male who lives in the Midwest, has completed some college and earns \$50K-\$75K yearly. MeasureCast, a provider of overnight webcast audience measurement and demos, teamed with Harris Interactive to conduct the demographic makeup analysis of streaming media users.

Of the 9,721 interviews, nearly one in six respondents

(16%) qualified as active streaming media consumers—audio or video—for at least one hour in the past 30 days. Of this group, one-fifth (20%) watch or listen to streaming media every day. More than one-half (57%) use the medium a few times per week. The study also found that overall, men (20%) are more likely to qualify as active streaming media users than women (12%).

The study also reveals that the typical streaming media consumer uses the Internet for at least eight hours a week, and that he is more likely to use broadband than typical Internet users. More findings:

- 67% of the online population is familiar with streaming media.
- Men (76%) are more familiar than women (58%).
- People with household incomes of \$50K or higher (71%) are significantly more familiar than people with household incomes less than \$50K (65%).
- The majority of active streaming media consumers will 'definitely' continue to use streaming media (75%).
- Of individuals who use streaming media every day, 92% are significantly more likely to 'definitely' continue using streaming than those who use streaming media weekly (75%) or monthly (55%).

The findings reported here are based on an August

2000 survey conducted by MeasureCast and Harris Interactive. The respondents were an online sample drawn from Harris Interactive's panel of more than 7M participants over 18. The complete study can be downloaded at www.measurecast.com/study.—CM

Citadel launches comedy format

In an agreement with Comedy World Radio Network, Citadel Communications (O:CITC) has launched the net's 24/7 Comedy format on three of its AM stations: WNSS Syracuse, KEYF Spokane and WFPG Atlantic City. Daily news, trends and commentary are presented with a humorous edge, along with original shows by comedians **Sandra Bernhard**, **Ken Ober**, **Allen Havey** and **Bobby Slayton**. Comedy World is set to have a channel on Sirius Satellite Radio's (O:SIRI) system.

"We're testing it—we like the product, we thought it was a unique niche format concept," Citadel COO **Bob Profitt** tells *RBR*. "We think that there might be a market for this. They've got a good marketing campaign. If all goes well, we would certainly look at other markets where we might pick it up."—CM


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Format preferences are a regional thing

While News-Talk stations boast more listeners nationwide than any other format group, that is not the case in the South, where it ranks only #5. #2 Adult Contemporary swings on a tight pendulum, finishing either #1, #2 or #3 in all six RBR-defined regions. To the contrary, Spanish stations, which are #6 nationwide, have a wide arc, rising to #2 in the Pacific but sinking to #14 in the Mid-Atlantic.

RBR's six regions are set up to be roughly equal in the number of total listeners. All are roughly between 21M-26M. Stats used for this study are P12+ weekday AQH numbers from the Arbitron Fall 1999 survey, compared to information from the RBR Source Guide database. The index shows how the format performance in each region compares to the national total. An index of 100 means it equals the national average, above 100 means it exceeds it and vice versa.

RStns refers to the number of rated stations in each format group; UStns refers to the number of unrated stations. Note that, because of the difference in city sizes, the Northeast needs only 642 stations to reach over 20M listeners, while the South requires 1,659 stations.—DS

Format Groups

Fmt	Rnk	Full name	Also includes
NTS	1	News-Talk	Sports, Bus
AC	2	Adult Contemp	Hot AC, Soft AC
CHR	3	Contemp Hit	Top 40
Ctry	4	Country	
Urb	5	Urban	Rhythmic Oldies
Span	6	Spanish	Ethnic
CIRk	7	Classic Rock	Classic Hits
Rock	8	Rock	
Old	9	Oldies	
AltV	10	Alternative	Modern Rock
Stds	11	Standards	MOR, Easy
Rel	12	Religion	Gospel
SmJz	13	Smooth Jazz	Jazz
Clsc	14	Classical	
Other	15	Other	Child, Variety

Source: Arbitron, RBR Source Guide database

Northeast

States: Connecticut, Maine, Massachusetts, New Hampshire, New York, Rhode Island, Vermont

Rated stations: 437

Unrated stations: 205

Top 25 metros: New York (1), Boston (8), Nassau-Suffolk (18)

12+ population: 21,802,232

RBR observation: News-Talk wins three of the six regions. This is one of them. Not only do Alternative stations outdraw straight and Classic Rockers, it even beats out Country. In fact, this is the worst part of the country for Country. The coasts are most congenial to Classical and Jazz, although the latter category doesn't quite match its national rating here.

Rank	Fmt	RStns	UStns	Rating	Index
1	NTS	74	40	19.3	128
2	CHR	41	1	16.4	140
3	AC	69	21	15.8	109
4	Urb	18	4	8.6	83
5	Span	14	24	8.0	118
6	Old	35	10	6.3	117
7	AltV	26	9	5.8	132
8	Ctry	39	17	4.4	40
9	CIRk	31	6	4.1	72
10	Rock	24	1	3.2	59
11	Clsc	7	3	2.6	173
12	SmJz	7	1	2.3	92
13	Stds	34	25	2.1	66
14	Rel	17	34	1.0	40
15	Other	1	9	0.0	0

Source: Arbitron, RBR Source Guide database

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Mid-Atlantic

States: Delaware, District of Columbia, Kentucky, Maryland, New Jersey, Ohio, Pennsylvania, Virginia, West Virginia

Rated stations: 755

Unrated stations: 248

Top 25 metros: Philadelphia (5), Washington (9), Baltimore (20), Pittsburgh (22), Cleveland (24)

12+ population: 22,692,776

RBR observation: One of two regions led by AC stations, followed by News-Talk. Urban is strong and Country does well, but Spanish is almost non-existent. Look for that to change a little bit as Mega Media clusters in Washington and Philadelphia begin to take hold.

Rank	Fmt	RStns	UStns	Rating	Index
1	AC	112	16	16.0	110
2	NTS	122	54	14.4	95
3	Urb	53	4	14.1	137
4	Ctry	112	36	12.6	116
5	CHR	48	5	9.0	77
6	Rock	40	1	8.1	150
7	Old	58	16	6.2	115
8	CIRk	49	3	5.5	96
9	Stds	50	17	4.2	131
10	Rel	66	71	3.4	136
11	AltV	20	3	2.8	64
12	SmJz	11	1	2.2	88
13	Clsc	2	0	0.9	60
14	Span	9	9	0.6	9
15	Other	3	12	0.0	0

Source: Arbitron, RBR Source Guide database

South

States: Alabama, Arkansas, Florida, Georgia, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee

Rated stations: 1,187

Unrated stations: 472

Top 25 metros: Atlanta (11), Miami (12), Tampa (21)

12+ population: 25,944,341

RBR observation: Ironically, Urban is the leading format in one of the nation's most rural regions, due to the heavy concentration of Blacks in many Southern states. This is also Country's best region, and is far and away the most congenial area for commercially-operated Religious stations, which have double their national presence here.

Rank	Fmt	RStns	UStns	Rating	Index
1	Urb	155	13	17.7	172
2	Ctry	169	57	14.9	137
3	AC	120	15	12.0	83
4	CHR	85	4	11.3	97
5	NTS	165	84	9.8	65
6	CIRk	80	0	6.3	111
7	Old	75	25	5.4	100
8	Rel	145	191	5.1	204
9	Rock	48	2	4.6	85
10	Span	29	28	4.5	66
11	Stds	60	29	3.7	116
12	AltV	23	6	2.5	57
13	SmJz	15	1	1.6	64
14	Clsc	2	0	0.5	33
15	Other	3	17	0.1	100

Source: Arbitron, RBR Source Guide database

Midwest

States: Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, South Dakota, Wisconsin

Rated stations: 868

Unrated stations: 286

Top 25 metros: Chicago (3), Detroit (8), Minneapolis (17), St. Louis (19)

12+ population: 24,530,318

RBR observation: The Midwest comes fairly close to mirroring the national totals. Its primary deviation concerns Spanish formats: Chicago is just about the only city in the region with a substantial Hispanic population, so the regional total for the format is depressed. Second to that is the extent of the area's preference for Rock and Classic Rock over Alternative.

Rank	Fmt	RStns	UStns	Rating	Index
1	NTS	147	58	18.2	121
2	AC	137	41	13.4	92
3	Ctry	137	34	12.2	112
4	Urb	37	3	9.9	96
5	CHR	59	4	9.8	84
6	CIRk	73	7	7.7	135
7	Rock	68	3	7.4	137
8	Old	56	9	5.5	102
9	Altv	25	1	3.6	82
10	Stds	54	18	3.3	103
11	SmJz	7	1	2.4	96
12	Span	10	13	2.3	34
13	Rel	47	82	2.3	92
14	Clsc	8	1	1.6	107
15	Other	3	11	0.0	0

Source: Arbitron, RBR Source Guide database

Southwest-Rockies

States: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Oklahoma, Texas, Utah, Wyoming

Rated stations: 718

Unrated stations: 206

Top 25 metros: Dallas (7), Houston (10), Phoenix (15), Denver (23)

12+ population: 20,800,530

RBR observation: AC squeaks out a victory over Country in this region. We checked the four largest cities, and it is preferred in all of them except Houston (as well as being vastly more popular in Salt Lake City). Win the cities, win the region. Niche formats Jazz and Classical do not do well here, and News-Talk underperforms.

Rank	Fmt	RStns	UStns	Rating	Index
1	AC	90	3	15.1	104
2	Ctry	107	26	14.3	131
3	NTS	101	35	12.6	83
4	CHR	49	1	11.7	100
5	Span	111	51	10.3	151
6	Urb	32	2	7.2	70
7	Rock	30	0	6.1	113
8	CIRk	41	8	6.0	105
9	Altv	30	2	5.2	118
10	Old	41	10	5.0	93
11	Stds	28	3	2.3	72
12	SmJz	9	1	1.9	76
13	Rel	42	48	1.4	56
14	Clsc	5	0	1.0	67
15	Other	2	16	0.0	100

Source: Arbitron, RBR Source Guide database

Pacific

States: Alaska, California, Hawaii, Oregon, Washington

Rated stations: 587

Unrated stations: 180

Top 25 metros: Los Angeles (2), San Francisco (4), Seattle (14), San Diego (16), Portland (25)

12+ population: 25,702,722

RBR observation: News-Talk is in first place, but this is the stronghold of Hispanic-formatted stations, due to Los Angeles and many other California cities. It is also the stronghold of Smooth Jazz, the only region where it beats its national average. Alternative beats out Rock and Classic Rock, and Country is a mere shadow of its normal self.

Rank	Fmt	RStns	UStns	Rating	Index
1	NTS	90	31	16.4	109
2	Span	102	52	15.3	225
3	AC	81	8	15.2	105
4	CHR	47	0	12.2	104
5	Ctry	53	8	6.6	61
6	Altv	29	3	6.5	148
7	CIRk	34	1	4.6	81
8	Old	31	4	4.3	80
9	SmJz	17	1	4.1	164
10	Urb	12	5	3.9	38
11	Rock	24	2	3.5	65
12	Stds	28	3	3.2	100
13	Clsc	8	3	2.5	167
14	Rel	28	46	1.3	52
15	Other	3	13	0.2	200

Source: Arbitron, RBR Source Guide database

Upfront Uncertainty

by Mitchell Scholar

It's been a year since we experienced the intense pace generated by last year's national radio upfronts. Q4 '99 activity was extraordinary, a flurry of business due to the emergence of e-commerce into the marketplace. In response it seemed that everyone rushed in with check books loaded to buy, buy, BUY! Here we are, just before Thanksgiving, working our '01 upfronts faced with a "hurry up and wait" attitude; a vastly different scenario from last year. It leaves me questioning why; what has changed? At first, I thought the upfront would spring to life shortly after Labor Day. When this didn't happen, I considered the Summer Olympics were the cause of delay and assumed when the Olympic torch went out, our upfront games would begin. Wrong again! Looking at things as they are, I am cautiously optimistic the first of December will see the long awaited activity for national radio. Yet, like my colleagues, I am curious what has changed. My sources tell me there is actually an increased interest in network radio for '01. Many submissions have been requested yet very few advertisers have crossed the threshold of speculation and fact finding into the marketplace with an actual commitment to purchase. After 25 years of direct involvement in media buying I share my observation that in years where there is a presidential election combined with the Olympics, the crush of the pre-election advertising along the wave of media blitz for the mega sports extravaganza leaves advertisers lethargic and budgets exhausted. The year following the combined occurrence has consistently seen reduced interest, and often smaller budgets. Last year many buyers witnessed marked increases in network rates. Inventory was scarce. Considering the drop off in 2000's Q4 scatter business, and the current economic uncertainties largely due to the post-election confusion which we're all now experiencing, it is truly now a guessing game as to what will transpire over the next few weeks. One thing of which I am very certain—only time will tell!

Mitchell is Director of National Radio at NY-based Horizon Media. He can be reached at mscholar@hmi-inc.com

The technology of targeted ad insertion

by Carl Marcucci

By now, just about everyone knows about targeted ad insertion for Internet streams. Needless to say, most of us know very little of how it's done. Given that there are close to 10 players in the space already, we wanted to know what sets some of them apart technically and what makes them tick. Without going into the bits and bytes of software engineering, *RBR* asked for the basics on how a targeted ad is inserted into a live stream, what stations should look for in choosing a service provider for their own website and some of the hurdles that came along in development. The following participated: **Mark Duvall**, CTO, Hiwire; **Tom Des Jardins**, CEO/CTO Lightningcast; **John LaFreniere**, Chief Technology Officer, Coolink Broadcast Network; **David Seaberg**, Chairman/CTO DirectAir; **Philippe Generali**, President, RCS and **Ben Day**, Director of Technology, SurferNetwork.

Tell us how the ad insertion process works with your system.

Duvall: Conceptually, Hiwire's spot insertion process works in a fashion similar to the way the cable industry delivers TV ads. The feed, or stream in our case, carries additional signals that trigger the commercials. While cable can target to neighborhoods, Hiwire's system extends deeper, right to the individual listener. To Hiwire-enable a stream, we tap into a station's automation system, read the "tags" for an outgoing ad spot and then deliver the right ad to each listener—targeted for age, gender and zip code. We have sophisticated asset downloading, local caching and management to assure an absolutely seamless experience for the listener. In fact, the insertion happens imperceptibly.

Des Jardins: Lightningcast's system allows the insertion of advertising across multiple content delivery networks such as Akami or Activate and across multiple technologies such as Windows, Real and MP3. We do this for both on-demand and live in Netscape and Internet Ex-

plorer without requiring a download. We support both video and audio. Our proprietary distributed ad serving network inserts ads in a scalable fashion by replacing small cues or tags that are inserted at the head end (the encoding server for the main audio stream) with targeted and audited ads at the listener or viewer client. Currently most webcasters are streaming in multiple technologies so that they can have the largest possible audience. The webcaster will stream the signal out in analog format from a station automation system running on a Windows box using

software such as Scott or Dalet to a bank of streaming media encoder boxes running Real, Windows Media Player and maybe MP3. These encoders are usually in the same facility as the webcaster. The encoder is connected via a leased line or the Internet to the server box. The server box must match the encoding technology, so a Windows Media Player encoder box will require a Windows Media server and so forth. The server box is usually co-located at the streaming ISP. This server box is the box that the actual listener connects to.

Lightningcast interfaces to the webcaster by taking that raw feed from the station automation system and installing software in the encoder box to synchronize the insertion of tags that are specific to the encoder and the station. For each encoding technology, we insert the tag that's correct for that particular encoding technology. Note that no ads are sent to the listener at this point, only a stream is received at the listener that has these tags embedded in it. Then at the listener side, when the stream

is received, the listener registers within the Lightningcast ad server and it supplies the correct ad based upon the listener's profile and then puts the ad into the listener's stream.

LaFreniere: Radio stations or streaming content providers produce an "event" to begin the ad insertion process. This "event" can

be as simple as a contact closure from a DJ board or automation system, and as elaborate as allowing CLBN's systems to read information directly off of the automation system using XML. Once the event triggers are established, CLBN will target the time slot pro-

vided with live and interactive, synchronized rich media ads.

Seaberg: We provide software and support for any radio station free of charge to interface the station's automation equipment with a DirectAir-enabled encoder. The automation equipment sends a signal to the encoder indicating the start of a commercial break. The DirectAir software that resides at the station also reads the merged commercial and music log to determine the length of each

commercial break. This log is also used to generate song title and artist graphics and information on the branded player. DirectAir provides a branded personalized player for each station free of charge with station logo and graphics. With our personalized player, lis-

teners can select update and Break-In-Audio™ information to play at requested intervals. For example, a listener may enter their stock symbols in the player and request a Break-In audio alert if any of these stocks go up or down by X%.

There are many companies that have been focused on providing ad insertion technology. Some attempt

to sell Internet radio advertising based on false consumer profiling data. This is evident as you see banner ad companies using early web targeting techniques for Internet radio. Engage, for example, was recently quoted in *iMarketing News*: "We found working with some free ISP companies that only 30% of people accurately gave their ZIP codes." With DirectAir, each time the listener tunes in, they have the option to filter up to six out of seven commercial categories they are not interested in. By empowering listeners to filter out commercial categories, and not asking personal questions, such as their age, sex and zip code, listeners have no reason to lie about their selections. Advertisers can be confident that their media buy is reaching the right audience.

Generali: The role of RCS in the ad insertion technology is to provide the points at which you can cover the signal of the terrestrial radio station, and how you cover it. In other words, how we make it sound tight with the rest of the broadcasting, a seamless transition between theads and the actual on-air ads. We prep the signal of the radio station so that we wrap our little marks around the encoded signal. And down the road in the player, those marks will act as points of reference where we're going to know when to call for targeted ads that we're going to then replace in the stream. We will also take care of covering your terrestrial ad with appropriately targeted ads only for your Internet audience. This the role of Engage—to serve and sell the ads.

Day: Using a proprietary server which we place in each radio station, we combine the station's audio feed with their broadcast automation data and send it to a central site from which we stream to our listeners. At that site, we analyze the BA data to identify intervals where we can insert advertisements which consist of a 468x60 banner with synchronized audio. Using our patent-pending technology, we combine audible banner ads with e-commerce click-through capability.

Engineered For Profit



LaFreniere

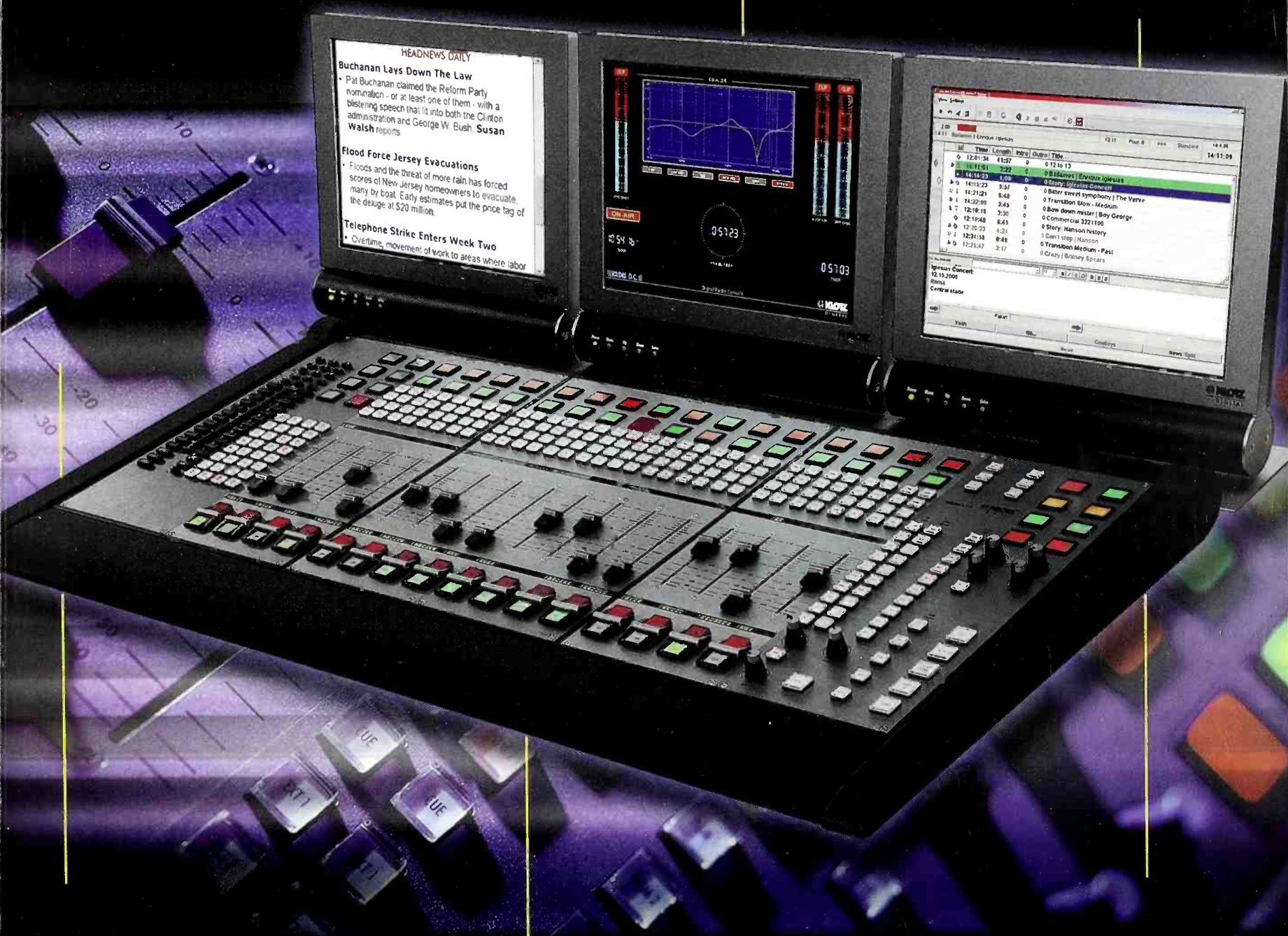


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What are the biggest hurdles to getting targeted or dynamic ad insertion working?

Duvall: Any athlete or performer knows what it takes to make their talent seem effortless—a lot of work. There are tremendous hurdles to overcome to get live stream ad insertion to work as smoothly as Hiwire's does. Bandwidth issues, compatibility issues, issues with underlying player architectures and unreliable operating systems. And those are just a few of the client-side issues. Targeted ad insertion goes far beyond simply getting an ad to play.

Des Jardins: Understanding the Internet's impact on your brand. If you look at the Internet as just a place to add 10% more audience, then you are in for a lot of trouble. This is the equivalent of a new station that you are launching, and the targeting and dynamic nature of the advertising are just a few of the issues that a new webcaster faces. How many terrestrial stations broadcast across all 24 time zones?

LaFreniere: Since CLBN's live and interactive rich media ad insertion is already targeting across our network of broadcast partners, the biggest hurdle now is educating broadcasters and advertisers of our technology's full range of abilities. Our current targeting methods laser-target the connect or gateways ads seen by the listener upon connection and then target the ad insertion based on a real-time composite demographic of the listeners on each individual station.

Seaberg: There are no hurdles for ad-insertion. Integrating with radio stations has been a simple task. Anyone can do ad-insertion, not everyone can provide a revenue stream.

Generali: We had to overcome issues like buffering, and exact lengths of the ads, splitting away at the proper second and coming back to the main stream also at the appropriate time. You do not want to hear a little bit of the terrestrial ad and several seconds into the terrestrial ad, boom, you split to a new ad which is Internet-only.

And then when it's a commercial break that lasts for three minutes, three minutes and twenty seconds you're still playing your Internet ads, because you didn't do a good calculation of how much you had to cover. So when you come back the radio station it's already 10 seconds into your favorite hit and you've missed the station ID, you've literally botched the signal of the radio station. We thought that this would be a deal breaker for anybody that would realize what we were doing to their signal on the Net. So we did a lot of research as to how we can ensure that the covering of the ads is seamless and sounds good. RCS is really in a very good position to do the marking because we wrote the book on music scheduling with our flagship product Selector.

Day: Neither RealPlayer nor Windows Media Player can synchronize the delivery of streamed audio with banner ads...so we developed the technology, which is patent-pending. Next to that, we develop interface solutions for each type of broadcast automation system in the field with which we plan to work.

What should stations be looking for in an ad targeting system?

Duvall: They should be looking for a system that is capable of generating maximum revenues from each and every listener, regardless of who or where they are. The system should monetize out-of-market listeners and segment in-market listeners into more valuable subgroups. It should also allow the station to participate in an orderly global marketplace for the exchange and placement of commercials. Look for excellent and comprehensive reporting, ease of book-

ing and trafficking, and ease of installation and maintenance. Look beyond the client software and the encoder software. Remember, getting an ad to play is just a fraction of the work. Look at the data centers. Make sure the heart of the system is running on big iron, on big name databases, scalable, distributed architectures. Look at the qualifications of the people who built and maintain it, and the size and quality of the



Seaberg

team. And by the way, it should actually work!

Des Jardins: Strong profiling (required to achieve highest value of the inventory); Strong targeting (required for the Internet, allows a global brand to have local advertising); No download required; Supports Windows, Real, and MP3; Supports both Netscape and Microsoft IE; Scalable distributed system (required to reach the large audiences possible on the Internet); Supports both streaming audio and video (required to fully leverage webcaster's content); Supports live and on-demand (required to fully monetize webcaster's content); Support for multiple content delivery networks (required to control the costs and increase the reliability of delivering content to large audiences); In-house sales force (required to actually move inventory).

LaFreniere: Broadcasters should identify an ad targeting company that can provide a range of interrelated key services, so that they acquire what they need without incurring excessive third-party costs and headaches. A provider should offer encoding, streaming services, ad insertion, advertising sales, and a full suite of reporting and tracking tools. Specifically, when radio stations need to "go live" or deviate from the planned programming, an ad insertion company must be able to recognize these events and

return control of the stream back to the station at a moment's notice.

The ad insertion and streaming technology must ensure a quality listening experience to enhance station loyalty. Also, the media player should have the station's branding or logo in a "click-able" format so the listeners can directly access the station's website. The media player should not require a user to download and load an application to access the broadcast stream. The ad insertion model should allow the station to profit from its listeners, not just to incur bandwidth costs. An ad insertion partner should be able to provide an online advertising order entry system to allow stations to sell some of their own Internet advertising.

Seaberg: Stations should not accept any targeting system unless it only delivers advertising dollars from non-traditional broadcast advertisers. Stations should look for a low-cost easy to integrate turnkey system. Don't ask the radio station to sell their Internet audience themselves when the station down across town is giving the audience away for free. The advertisers won't buy it. Stations should be aware that the future of cookie-based targeting engines that track listeners as they surf the Internet are likely to diminish with the increasing number of privacy violations, and as the public becomes more aware of these tracking methods.

Generali: The first thing is, does it sound good? And that's how they should worry about picking up suppliers of ad insertion—let me listen. Do it for me, replace my ads for a couple of days and let me see how it sounds. If it has errors, and if it screws up. The number two concern that people should look for is reliability of the vendor. How long has this vendor been around? And it is very important to know that today. There's not one day that passes by without a dot-com closing the door or going bankrupt.

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Emmis shelves tracking stock

When Emmis Communications (O:EMMS) proposed a tracking stock for its TV group back in May, the idea was to unlock the full value of the company's radio operations by removing the drag from TV. But now radio stocks are no longer flying high, so Emmis has moved the tracking stock plan to the back burner.

"Given the current market conditions in the media sector, we decided not to move forward immediately," CFO Walter Berger said in a statement. "Instead, we will continue to evaluate our tracking stock plan as equity market conditions change over the next several quarters."

Media Markets & Money™

by Jack Messmer

Cumulus same-station revenues and BCF down

Cumulus Media (O:CMLS) had kept Wall Street expectations low, so it was no surprise when the company reported that same-station revenues for the third quarter declined 4.7% to \$28.8M and broadcast cash flow (BCF) dropped 38.5% to \$7.1M. Those same-station numbers are for the 150 stations in 29 markets that Cumulus had operated for at least a year.

Other ways of crunching Cumulus' financial results also show significant declines in BCF: Actual Q3 results had net revenues up 22.9% to \$47.3M, but

BCF down 4.7% to \$15.7M; Proforma results for Q3 (227 stations in 46 markets, including all pending acquisitions and divestitures) had net revenues down 2.7% to \$55M and BCF down 22.8% to \$15.1M.

Wall Street expectations had been so low, though, that Cumulus' stock price went up \$1.125 after the 11/14 announcement to close at \$6.063.

In their conference call with analysts, CEO **Lew Dickey Jr.** and CFO **Marty Gausvik** disclosed that Cumulus had identified \$20.2M in sales that were recognized as revenue in 1999 and even '98, but were never collected. The company has

written off \$12.9M and has established a \$7.3M reserve for the remainder, as efforts continue to collect those long-overdue advertising bills.

Dickey is predicting that revenue and cash flow gains in the fourth quarter will essentially cancel out the third quarter losses, setting the stage for real growth in 2001. He says he's comfortable with estimates that Cumulus will grow revenues by 7% next year and cash flow by 15%.

Meanwhile, Cumulus has hired **Jonathon Pinch** away from Clear Channel (N:CCU) to become VP and COO, effective 12/1. Pinch is currently in London, heading Clear Channel International.

Newsweb Corporation

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Infinity completes spin-offs

Deals have been filed at the FCC for the last six stations that Infinity (N:INF) had to divest due to the merger of former parent company CBS into Viacom (N:VIA). The buyers are two big radio groups and two African-American women with broadcasting experience.

- In California, Disney's (N:DIS) ABC Inc. is paying \$65M for KRLA-AM Los Angeles and \$3.31M for KRAK-AM Sacramento. If ABC decides to LMA KRLA before closing, it'll pay \$325K per month. Broker: Media Venture Partners

- In Chicago, Salem Communications (O:SALM) is paying \$29M for the the 1160 kHz signal which became WXRT-AM in July when Infinity moved its Sports format and WSCR-AM call letters from 1160 to 670, the former WMAQ-AM. Since then, with the divestiture pending, WXRT-AM has been simulcasting AAA WXRT-FM. The sale will give Salem a combo in Chicago, where it already owns WYLL-FM. Broker: Gary Stevens & Co.

In Dallas-Ft. Worth, KHVN-AM is being purchased for \$4.7M by Trumpet Broadcasting Inc., headed by President **Clara McLaughlin**. According to **David Honig** of the Minority Media and Telecommunications Council (MMTC), McLaughlin had been the first African-American woman to own a TV station and is re-entering broadcasting after selling her TV station in the Tyler-Longview, TX market a few years ago. Look for KHVN's long-established Gospel format to continue. Broker: MMTC

In Baltimore, Gospel WBGR-AM & Religion WBMD-AM are being purchased for \$5.4M by Expanse Communications Inc., headed by President **Jeanell Hines**, an African-American woman with some 20 years of radio sales and management experience in the Baltimore and Washington, DC markets. "It was just her time," said Honig, noting that Hines had followed the traditional route of rising through the ranks to radio ownership. "That has seldom worked for minorities, but this time it did," he added. Broker: MMTC

Mega raises mega-bucks

Mega Communications is poised for another buying spree after getting \$65M in financing from TD Securities (\$40M) and GE Capital (\$25M). A statement from Chairman **Adam Lindemann** indicates that the fast-growing Hispanic radio specialist has its eye on the Miami and Los Angeles markets, as well as expansion in New York. Mega, whose operations are headed by President **Alfredo Alonso**, currently owns stations in nine East Coast markets.

Another CFR sale

Catholic Family Radio is continuing its station sell-off. This time it's WYPA-AM Chicago, which is going to **Fred Eychaner's** Newsweb Corp. The buyer already owns block-programmed Ethnic WSBC-AM & WJFC-AM in the Chicago market, along with WPWR-TV (Ch. 50, UPN). Broker: **Tom McKinley** and **Austin Walsh**, Media Services Group

Latest Clear Channel buys

Can you imagine an issue of *RBR* that didn't have Clear Channel (N:CCU) buying something?

CCU is adding to its stable of stations in New England with a \$5.8M buy of Excalibur Media's five stations in Vermont: WSYB-AM & WZRT-FM Rutland, WLCQ-FM Middlebury and WWWT-AM & WCVR-FM Randolph. Excalibur is owned by three veteran—and we do mean veteran broadcasters—**Jim Champlin**, **Joel Hartstone** and **Marty Beck**. They're also Internet guys—as founders of SiteShell Corporation.

CCU has LMA'd KREW-FM Naches, WA and filed at the FCC to buy the station from Butterfield Broadcasting Corp. for \$1.3M. That would give Clear Channel a fourth FM and sixth station in the Yakima, WA market.

CCU is exercising its option to buy already-LMA'd KAZX-FM Kirtland, NM in the Four Corners market. Richard Thomas' Radio Properties Inc. will be paid \$1.26M.

Radio One buying and selling

Urban specialist Radio One (O:ROIA) has entered into an acquisition/LMA deal with **John Borders'** Sunburst for KGDE-FM Dallas. The station, at 94.5 MHz out of Gainesville, TX, will be acquired for about \$52.5M. It will not remain KDGE for long, however. Radio One is also acquiring the call letters and format of "Jammin' Oldies" KTXQ-FM from Clear Channel. The total cost of the deal, per a release from broker of record Star Media Group, was \$59.4M, placing value of the intellectual property of KTXQ at about \$6.9M.

In a concurrent deal, Cox Radio (N:CXR) will be adding to its cluster in Richmond, VA and entering the Greenville-Spartanburg, SC market via a \$52.5M deal with Radio One. Cox will get WDYL-FM in Richmond, where it will become the group's 4th FM signal along with a single AM station. In Greenville, Cox gets WJMZ-FM and WPEK-FM. Broker: **Charles Giddens**, Media Venture Partners-DS

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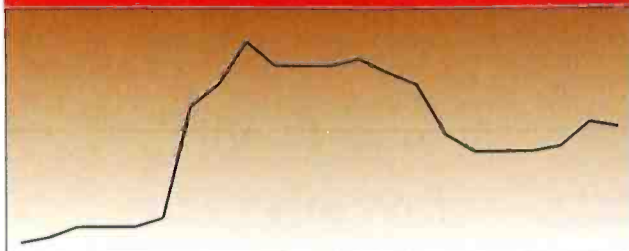
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Election uncertainty and nervousness about the economy helped send The Radio Index™ down 6.944 for the week to close 11/15 at 140.451.

160
140
120

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11/1

11/8

11/15

The deals listed below were taken from recent FCC filings.

Transaction Digest[®]

by Dave Seyler & Jack Messmer

RBR's Transaction Digest reports on all deals that involve assignment of a station license (FCC Form 314) and substantial transfers of control of a licensee via a stock sale (FCC Form 315), but not internal corporate restructurings (FCC Form 316). All deals are listed in descending order of sales price.

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\$36,000,000 WNNJ AM & FM, WHCY-FM & WSUS-FM Sussex NJ (Newton, Blairstown, Franklin) from Nassau Broadcasting II LLC, a subsidiary of Nassau Broadcasting Partners Inc. (Louis F. Mercatanti Jr. et al) to Clear Channel Communications Inc. (N:CCU) (Lowry Mays et al). Swap. Along with this station cluster Clear Channel receives purchase option for WTSX AM & FM Newburgh-Middletown NY (Port Jervis NY) valued at \$2M, which seller runs in an LMA, in return for WEEX-AM & WODE-FM Allentown-Bethlehem and \$6M cash (see below). Existing **superduopoly** in Sussex market. WTSX AM & FM would form **duopoly** with WELV-AM & WTSX-FM in Newburgh-Middletown. Total value of deal is an *RBR* estimate.

Duopoly in Pueblo, and additional overlap with certain stations in Colorado Springs and Denver markets resulting in four distinct markets; existing **duopoly** in Chico CA with additional overlap with two stations in the Sacramento market; existing **duopoly** in Eugene. Broker: Jorgenson Broadcast Brokerage (buyer)

\$30,000,000 WEEX-AM & WODE-FM Allentown-Bethlehem PA (Easton PA) from The Clear Channel Trust I, Charles E. Giddens, Trustee on behalf of Clear Channel Communications Inc. (N:CCU) (Lowry Mays et al) to Nassau Broadcasting II LLC, a subsidiary of Nassau Broadcasting Partners Inc. (Louis F. Mercatanti Jr. et al). Swap. Nassau receives stns and \$6M cash in return for WNNJ AM & FM, WHCY-FM & WSUS-FM Sussex NJ and purchase option for WTSX AM & FM Newburgh-Middletown NY (Port Jervis NY) valued at \$2M which buyer runs in an LMA. Total value of deal is an *RBR* estimate.

\$35,500,000 KCCY-FM, KDZA-FM, KCSJ-AM & KGHF-AM Pueblo CO; **KPAY-AM & KMXI-FM, KHSL-FM** Chico CA (Chico, Paradise CA) and **KPNW-AM & KODZ-FM, KDUK-FM** Eugene-Springfield OR (Eugene, Florence OR) from McCoy Broadcasting Co. (Craig W. McCoy) to Clear Channel Broadcasting Licenses Inc., a subsidiary of Clear Channel Communications Inc. (N:CCU) (Lowry Mays et al). \$1.775M escrow, balance in cash at closing. Price reduced by \$1M if McCoy has not closed on its pending \$912K acquisition of KCSJ-AM & KGHF-AM from Bahakel Communications (*RBR* 12/27/99, p.14) by closing, or closing of Pueblo portion of this deal may be delayed at discretion of buyer.

\$9,000,000 WRRS-FM Birmingham AL (Cullman AL) from Eddins Broadcasting Co. (Mary Evelyn Jones, Clark P. Jones, C. Powell Jones Jr., Meredith E. Jones-O'Brien) to STG Media LLC, related to Black Crow Broadcasting Inc. (Michael & Nicole Linn, Steve Shelton). \$2.5M to Reality Radio Inc., which entered into a LMA/purchase option agreement with seller 9/2/98, \$6.5M to seller. **Superduopoly** overlap with stations in the Huntsville market. Seller retains WXXR-AM Cullman.

more transactions @ rbr.com

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Scott Systems give jocks tons of features they love!

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- Scott School training of your staff at your station.
- Now playing Title/artist/album cover displays and instant streaming for your Web site.
- Pre-dubbed custom startup music libraries.
- Time-saving CD rippers that digitally transfer music to hard drive in seconds per song.
- Optional SS32 Invincible that can *not fail* audibly!

(972) 620-2211 FAX: (972) 620-8811

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- No-dub instant LAN spot uploads from Sonic Foundry Vegas multi-track production.
- Uncompressed digital audio at a compressed price.
- Your choice of Novell, NT or Windows networking.
- CAT.5 audio wiring for fast installation.

Scott Studios' *unequaled* air studio features are why more U.S. stations use Scott Studios than the number two and three digital air studio systems *combined*.

The screenshot shows a digital interface with a playlist log on the left and a Cart Wall on the right. The playlist log includes columns for 'On-Air', 'Start', and song details like 'You Sang to Me' by Marc Anthony. The Cart Wall features buttons for 'Next', 'Title', 'Time', 'Year', 'Cat.', 'Auto', 'Back', 'Forward', 'Preview', and a digital clock showing ':08'. Below the Cart Wall is an alphabet grid from A to Z.

One of SS32 touchscreens is shown above. The log is at the left. Instant access Cart Walls are at the right. Visit scottstudios.com or call 800 SCOTT 77 for info.

Scott Studios
13375 Stemmons Freeway, Suite 400
Dallas, Texas 75234 USA
Internet: scottstudios.com

Scott Studios' Chicago Major Stations in Major Markets Los Angeles New York DC Philly San Antonio Dallas Phoenix Toronto Houston San Francisco

3,484 Scott & Computer Concepts client stations in the US

Major Stations in Major Markets use Scott Studios' Digital Systems

Announcers *love* Scott Studios' SS32. They can instantly play any recording, see live copy on-screen, view and easily edit logs. Scott Studios' intuitive touchscreen provides the simplicity that creative talent demands for their air studio digital audio!

That's why Mancow at WKQX FM in Chicago, Big Boy at Hip Hop 106/KPWR FM and Francisco Galves "Pacorro" at La Ley/KLAX FM in Los Angeles, Jim Zippo at HERO Radio in Dallas, Hudson and Harrigan at KILT-FM and Grego, Pruett & The Boner at KLOL FM in Houston, Bob and Erin at CHFI FM in Toronto and many other major jocks love their Scott Systems. A major FM in New York City is also installing their Scott SS32 System soon.

Scott Systems give jocks tons of features they love!

- Easy operation you can't get anywhere else!
- Cart Walls for instant effects, jingles and song requests.
- Last play and next scheduled play dates/times.
- A phone recorder with scrub and waveform editing.
- Pre-record Voice Trax or bits in air studio in context.
- Scott School training of your staff at your station.
- Now playing Title/artist/album cover displays and instant streaming for your Web site.
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The screenshot shows a grid of song cards with the following details:

9:23:13 On-Air 2	You Sang to Me Marc Anthony :11/4:24/F HIT DA3468 7:43 #1 for 2 weeks in June, 2000	Half A Minute Basia L 6/28 2p N 7/10 3p	Hands Jewel L 7/5 5p N 7/13 6a	Hang On Tight Ric Ocasek L 7/2 3a N 7/9 3p
Start 3	Can't Take That Away... Mariah Carey :17/4:13/F HIT DA5204 7:48	Happiness Vanessa Williams L 7/3 4p N 7/12 7a	Happy Girl Beth N. Chapman L 7/6 11a N 7/18 8p	Harbor Lights Bruce Hornsby L 7/4 2a N 7/12 7p
Start 3	Mariah Carey Backsell Eric Phillips :00/0:13/C VT JU1094 7:52	Harvest Moon Neil Young L 7/7 4p N 7/10 2a	Have I Told You Rod Stewart L 7/2 7p N 7/13 6a	Have You Ever Bryan Adams L 7/1 5a N 7/8 10p
Start 3	Dodge Trucks Q: Your Dodge Dealer :00/0:60/F COM DA2215 7:53	Have You Ever Brandy L 6/30 5a N 7/13 9a	Having A Party Rod Stewart/R. W. L 7/2 8p	He'll Never Leave Kathy Troccoli L 7/4 3a N 7/11 5p
Start 3	Coca Cola Q: The Real Thing :00/0:60/C COM DA1234 7:54	Healing Wynona Judd/M. E. L 7/2 9p N 7/15 4p	Hear Me In The Ha Harry Connick Jr. L 7/2 12a N 7/13 3p	He'll Never Leave Rita Coolidge/Lee L 7/1 3p N 7/13 7a
Start 3	Radio Voyager Fast Jingle Q: Radio Voyager :00/0:13/C JIN DA4315 7:55	Heaven And Earth Al Jarreau L 7/4 10a N 7/12 11	Heaven Knows Luther Vandross L 7/1 9p N 7/20 10p	Here In My Heart Chicago L 7/2 2a N 7/14 3p
Stack	Title	Time	Year	Cat.
Auto	Back	Forward	Pre-view	:08
		High Sierra Trio (Harris, Ronst) L 7/6 1p N 7/14 8a	Higher Ground Barbra Streisand L 7/4 12n N 7/13 8p	Hero David Crosby/Phil L 7/1 11p N 7/12 3p
		Hero Mariah Carey L 7/3 1p N 7/17 9p	Hero's Dream Jim Brickman L 7/3 7p N 7/12 5a	Hey Girl Billy Joel L 7/1 11p N 7/12 3p
		Holdin' On George Benson L 7/9 2a N 7/10 7p	Home Sheryl Crow L 7/2 3p N 7/16 6p	Hold On My Heart Genesis L 6/27 1p N None
				Hooked on a Mem. N. Diamond/Kim C. L 7/1 10a N 7/15 6p

Below the grid is a keyboard with letters A through Z.

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