

Ninth Edition

The M Street Radio Directory

A stylized blue radio tower icon with three concentric arcs above it, representing radio waves, positioned to the right of the word 'Street' in the title.

From the Editors of the **M STREET JOURNAL**, *Radio's Journal of Record.*

U.S. and Canadian AM/FM Stations, Formats, Station Contact Information,
The M Street Markets, LMA and Cluster Listings, Arbitron & Willhight Ratings

*“Gee, Hum,
Where have all the good
radio stations gone?”*



The
M Street Journal
RADIO'S JOURNAL OF RECORD

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The M Street Radio Directory



9th EDITION

Edited by Robert Unmacht
and Pat McCrummen

with

Steven Apel
June Barnes
Michael Crider
Cathy Devine
Kelly Ellsworth

Michelle Jasko
Shelly Leslie
Molly McIntosh
Jennifer Easton
Tom Taylor

Cover design by:
Kelli Grisez

M Street Corporation
Nashville, TN

Draw Closer to the Light and you will find the source for News & Trends effecting the radio business DAILY.



The editors gratefully acknowledge the assistance and contributions of:

J. T. Anderton
Greg Coniglio
Joe Costanzo
Mike Donath
John Dresser
Doug Fleming
Valerie Geller

Bob Gilbert
Phillip Wayne Huff
Chip Kelley
Peter Moncure
Thom Moon
Rod O'Connor
Chris Rohleder

Sean Ross
John R. Sally
Marc Schiffman
Gregg P. Skall
Phyllis Stark
Tony Sanders
Art Vuolo

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54 Music Square East, Suite 201, Nashville, TN 37203

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Table of Contents:

Foreword	7
Guide to Use	9
Format Classifications	13
Format Statistics	17
About Ratings	27
Radio Ratings - A Not Always Accurate Benchmark, by Steve Apel	28
What Were the Stations that Helped Change Radio Programming in the 90's by Sean Ross	31
Do you agree with my predictions? by Tom Taylor	35
Program Director Training Manual by Valerie Geller	39
And then there were two... by Tony Sanders	43
1999 FCC Overview, by Gregg P. Skall	45
Stations by State and City of License	53
The M Street Radio Markets	729
M Street Market Ranking	831
Stations by Call Letters	837
Stations by Former Call Letters	873
Stations by Frequency	885
Canadian Stations by Province and City of License	933
Canadian Stations by Market	979
Canadian Stations by Call Letters	985
Canadian Stations by Frequency	989
Networks/Programming	999
FCC Procedures, by Gregg P. Skall	1013
Station Update Form	1023
Order Form for the M Street Journal, M Street Directory, and the M Street Daily	1024

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Our little radio industry sure got discovered, didn't it?

Wall Street has rolled up, merged and consolidated radio to the point where it's unrecognizable to somebody from just five years ago. Managers are responsible for local clusters of 6, 7 and 8 stations and 100+ people. Group heads preside over station groups of 100, 300 or even 900 properties. Program directors sit in their offices and watch the minute-by-minute fluctuations of the stock price and try to figure out their options strategy. And Wall Streeters, who couldn't have named a single radio stock five years ago, are now experts in cash flow margins and cluster programming strategies — or they sound like experts, anyway.

That's the fundamental change in radio: The ownership consolidation made possible by the 1996 Telecommunications Act. That unleashed billion-dollar deals, made radio a darling of Wall Street, made virtually all major- and medium-market stations the property of publicly-held companies (which had seemingly unlimited access to capital), and drove up station prices. And so far it's all working. So far.

What happened to the operators? Well, they're still out there, trying to make budget every month, trying to keep the ratings high enough to keep the home office happy. And trying to keep the staffs of six stations now living under one roof one big, happy family. ("Hey, who parked in my parking place?" And, "Why did THEY get a new editing facility/new staff tee-shirts when we didn't?")

But it's the same wave that's sweeping through American businesses like banking, drugstores and bookselling.

Bookselling: Wait a minute — aren't a lot of people now shopping for and purchasing their books online? Is that going to happen to radio, too? The Internet may turn out to be a bigger threat to radio's traditional way of doing business than even national satellite radio (via Sirius Satellite Radio and XM Satellite Radio). Not to mention the murky transition to terrestrial Digital Audio Broadcasting. Long-term, broadband Internet access may just sweep away most things that went before it.

This 9th Edition of the M Street Directory has as much useful information about U.S. and Canadian radio as we could possibly pack into its pages. Stations are listed both by city of license and (where applicable) market. M Street goes deeper into markets than Arbitron, since we recognize many more "markets" than Arbitron.

Everything you see here in the Directory comes out of the authoritative M Street Database, which we update every day. If you have specific database needs — like, you need to fax all the oldies stations in the top 100 markets — contact us at (800) 248-4242 and ask about M Street's custom database work.

And speaking of "work", M Street Corp. thanks its hard-working staff in Nashville and elsewhere. Their names are printed in the front of this 9th Edition Directory, and we can tell you they all put in long hours on the phone, online and in the car. Their friends and spouses know that M Streeters will spend their travel time punching "Scan" on the car radio, looking for format changes. (It's not always easy on a relationship.)

We gratefully acknowledge the invaluable contributions of M Street friends in every U.S. state and Canadian province — people who call us or e-mail us whenever they hear a format change, or spot something in the Directory that needs to be updated. Feel free to join that cast of M Street friends.

If you'd like to buy extra copies of the Directory for yourself or a friend, just call us at (800) 248-4242.

And a quick plug for some other M Street products: the weekly M Street Journal that launched our company back in 1984, and the M Street Daily fax. Call us at (800) 248-4242 to see a sample of either or both. The Journal contains exhaustive coverage of FCC changes, format changes and the news. The M Street Daily covers whatever is news that day in radio.

A word about the abbreviations and codes you'll be seeing and using in the Journal: If you forget what "DA-2" means, just look it up in the front section of the Directory.

When it comes to format definitions, a reminder that the definitions in this Directory are those of M Street, and not the stations themselves. Stations might disagree, and we're happy to discuss our "call" of the format. We base our format definitions on our 17 years of experience classifying every station in the U.S. and Canada.

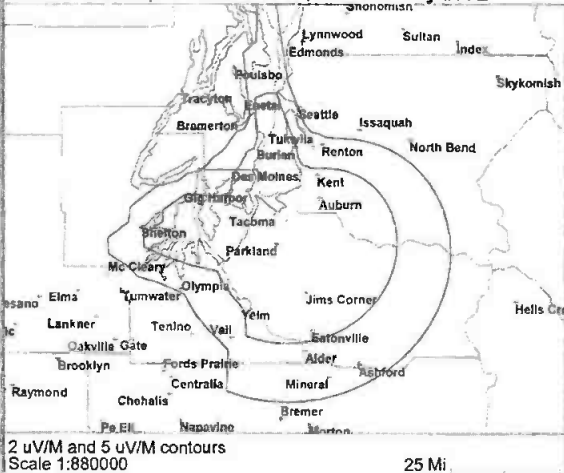
* And if you only have time to read two sentences on this page, here they are:

M Street worked very hard to make this 9th Edition Directory our best one ever. Hope it's useful!



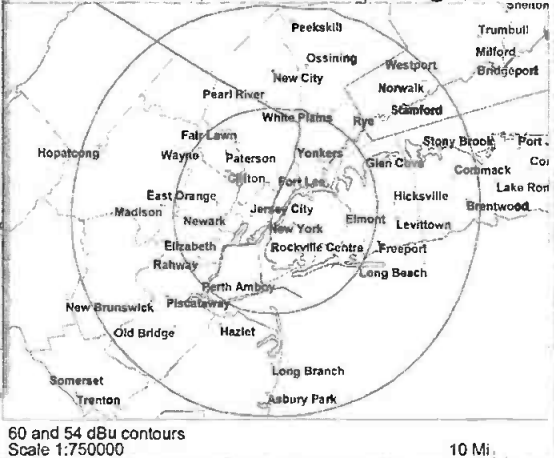
Mapping Services

KHHO Tacoma, WA 850 kHz 10,000 watts day DA-2

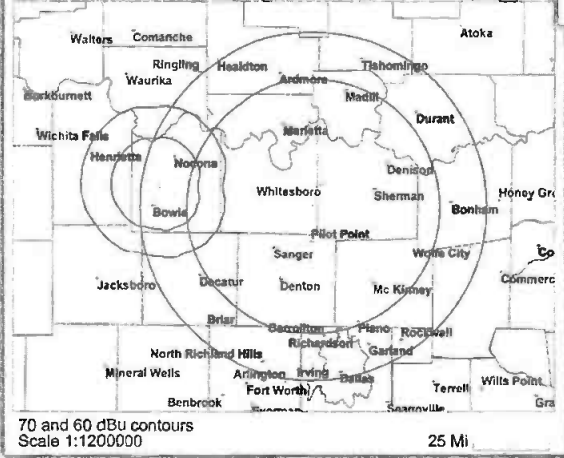


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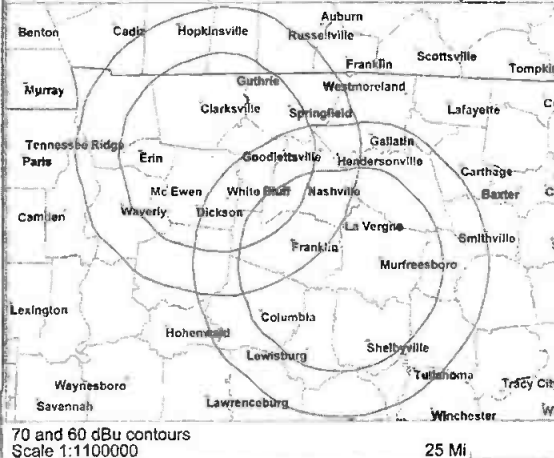
WCBS-FM New York, NY 101.1 Mhz 6,800 w @ 1,325ft



KRJT 100.7 Mhz Bowie (C3) move to Highland Village (C), TX



102.5 WQZQ Dickson, TN and 102.9 WZPC Shelbyville, TN



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Richland	
KOL 1300	Adult Contemporary [AC] 5000/5000 DA-N 1s 3s 7c 2t 8p cp 10000/5000 DA-N app 10000/7500 ND +Smith Broadcasting Corp. Sister to: KOL-FM LMA with: KTW-FM 509-555-9494 fax 509-555-9495 815 N Columbia Blvd, Kennewick 99336 GM Bob Smith PD Aaron Smith SM Delores Smith Richland/Kennewick/Pasco Arbitron 2.2% 800p Walla Walla Willhight 4.7%

Richland	
KOL 1300	Adult Contemporary [AC] 5000/5000 DA-N 1s 3s 7c 2t 8p cp 10000/5000 DA-N app 10000/7500 ND +Smith Broadcasting Corp. Sister to: KOL-FM LMA with: KTW-FM 509-555-9494 fax 509-555-9495 815 N Columbia Blvd, Kennewick 99336 GM Bob Smith PD Aaron Smith SM Delores Smith Richland/Kennewick/Pasco Arbitron 2.2% 800p Walla Walla Willhight 4.7

Richland	
KOL 1300	Adult Contemporary [AC] 5000/5000 DA-N 1s 3s 7c 2t 8p cp 10000/5000 DA-N app 10000/7500 ND +Smith Broadcasting Corp. Sister to: KOL-FM LMA with: KTW-FM 509-555-9494 fax 509-555-9495 815 N Columbia Blvd, Kennewick 99336 GM Bob Smith PD Aaron Smith SM Delores Smith Richland/Kennewick/Pasco Arbitron 2.2% 800p Walla Walla Willhight 4.7%

Richland	
KOL 1300	Adult Contemporary [AC] 5000/5000 DA-N 1s 3s 7c 2t 8p cp 10000/5000 DA-N app 10000/7500 ND +Smith Broadcasting Corp. Sister to: KOL-FM LMA with: KTW-FM 509-555-9494 fax 509-555-9495 815 N Columbia Blvd, Kennewick 99336 GM Bob Smith PD Aaron Smith SM Delores Smith Richland/Kennewick/Pasco Arbitron 2.2% 800p Walla Walla Willhight 4.7%

Richland	
KOL-FM 94.1	Easy Listening [EZ] 10000w 298 ft 8n 4t app 10000,1200 app add directional antenna +Smith Broadcasting Corp. Sister to: KOL LMA with: KTW-FM 509-555-9494 fax 509-555-9495 815 N Columbia Blvd, Kennewick 99336 GM Bob Smith PD Aaron Smith SM Delores Smith Richland/Kennewick/Pasco Arbitron 3.1% 800p Walla Walla Willhight 6.5%

Stations are listed under their legal city of license, in frequency order. AM stations first, then FM.

The AM Band extends from 530 KHz to 1700 KHz. The FM Band extends from 88.1 MHz to 107.9 MHz. The frequencies from 88.1 MHz to 91.9 MHz are reserved for non-commercial use. However, non-commercial stations may also occupy commercial allocations.

Call letters as issued by the FCC, and are listed above the frequency in the left margin.

If a station has changed call letters within the past seven years, see the **FORMER CALL LETTERS** section for a cross-reference to the current call letters.

Programming information is followed by M Street's format codes in square brackets. Please see the section **FORMAT CLASSIFICATIONS** for a complete explanation of our format classifications and their codes.

Current power and facilities as well as any changes applied for, or construction permits granted, are shown. For AM stations, the day power is listed first, then the night power if any, followed by the antenna configuration:

- ND non-directional, full time
- ND-D non-directional, daytime only
- DA-D directional, daytime only
- DA-N directional, nighttime only
- DA-1 same directional pattern day and night
- DA-2 different directional patterns day and night
- DA-3 different directional patterns day, critical hours, and night

FM stations list their effective radiated power (ERP) followed by the antenna height above average terrain (HAAT). FM stations whose ERP or HAAT is different for horizontal and vertical polarizations list the figures as (h) and (v). "DA" indicates a directional antenna is used.

Both AM and FM stations show a "=" to indicate a station that shares time with another station on the same frequency.

(Continued next page)

GUIDE TO USE

Richland

KOL 1300 Adult Contemporary [AC] 5000/5000 DA-N 1s 3s 7c 2t 8p
 cp 10000/5000 DA-N app 10000/7500 ND
 +Smith Broadcasting Corp.
 Sister to: KOL-FM LMA with: KTW-FM
 509-555-9494 fax 509-555-9495
 815 N Columbia Blvd, Kennewick 99336
 GM Bob Smith PD Aaron Smith SM Delores Smith
 Richland/Kennewick/Pasco Arbitron 2.2% 800p
 Walla Walla Willhight 4.7%

Richland

KOL 1300 Adult Contemporary [AC] 5000/5000 DA-N 1s 3s 7c 2t 8p
 cp 10000/5000 DA-N app 10000/7500 ND
 +Smith Broadcasting Corp.
 Sister to: KOL-FM LMA with: KTW-FM
 509-555-9494 fax 509-555-9495
 815 N Columbia Blvd, Kennewick 99336
 GM Bob Smith PD Aaron Smith SM Delores Smith
 Richland/Kennewick/Pasco Arbitron 2.2% 800p
 Walla Walla Willhight 4.7%

Richland

KOL 1300 Adult Contemporary [AC] 5000/5000 DA-N 1s 3s 7c 2t 8p
 cp 10000/5000 DA-N app 10000/7500 ND
 +Smith Broadcasting Corp.
 Sister to: KOL-FM LMA with: KTW-FM
 509-555-9494 fax 509-555-9495
 815 N Columbia Blvd, Kennewick 99336
 GM Bob Smith PD Aaron Smith SM Delores Smith
 Richland/Kennewick/Pasco Arbitron 2.2% 800p
 Walla Walla Willhight 4.7%

Richland

KOL 1300 Adult Contemporary [AC] 5000/5000 DA-N 1s 3s 7c 2t 8p
 cp 10000/5000 DA-N app 10000/7500 ND
 +Smith Broadcasting Corp.
 Pending to: Jones Broadcasting Co.
 Sister to: KOL-FM LMA with: KTW-FM
 509-555-9494 fax 509-555-9495
 815 N Columbia Blvd, Kennewick 99336
 GM Bob Smith PD Aaron Smith SM Delores Smith
 Richland/Kennewick/Pasco Arbitron 2.2% 800p
 Walla Walla Willhight 4.7%

Richland

KTW-FM 102.5 Country [CW] 12500w, 247ft 1f
 +Badger Broadcasting Corp.
 Management: +Smith Broadcasting Corp.
 LMA with: KOL, KOL-FM
 509-555-9494 fax 509-555-9495
 815 N Columbia Blvd, Kennewick 99336
 GM Bob Smith PD Aaron Smith SM Delores Smith
 Richland/Kennewick/Pasco Arbitron 13.8% 8100p
 Walla Walla Willhight 11.9%

This is an example of a granted construction permit (cp) for 10,000 watts day, 5,000 watts night, directional antenna night. See the power and facilities section on page 9 for a complete list of codes used for power and antennas.

Applications (app) filed with the FCC which have not yet been granted or dismissed.

M Street keeps track of station changes for the last nine years. A code follows the last digit of the year of the change:

- | | | | |
|---|------------------------|---|------------------|
| c | call letter change | f | frequency change |
| l | city of license change | n | new station |
| s | station sold | t | format change |
| p | facilities change | | |

For example: "7c" means that the station changed its call letters in 1997. "4t" means that the station changed its format in 1994.

The owner of the station.

A "+" preceding the owner indicates the company has an ownership interest in stations in other markets. For most major pending station sales, the organization buying the station will be listed as "Pending to:"

If the station is being managed by a company or person other than the owner, the organization or person will be listed here. The organization that manages the station may or may not own other radio stations. If they own other stations in the same market area, those stations will be listed in the sister station information on the next line.

Richland

KOL Adult Contemporary [AC]
1300 5000/5000 DA-N 1s 3s 7c 2t 8p
 cp 10000/5000 DA-N app 10000/7500 ND
 +Smith Broadcasting Corp.
 Sister to: KOL-FM LMA with: KTW-FM
 509-555-9494 fax 509-555-9495
 815 N Columbia Blvd, Kennewick 99336
 GM Bob Smith PD Aaron Smith SM Delores Smith
 Richland/Kennewick/Pasco Arbitron 2.2% 800p
 Walla Walla Willhight 4.7%

Richland

KOL Adult Contemporary [AC]
1300 5000/5000 DA-N 1s 3s 7c 2t 8p
 cp 10000/5000 DA-N app 10000/7500 ND
 +Smith Broadcasting Corp.
 Sister to: KOL-FM LMA with: KTW-FM
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 815 N Columbia Blvd, Kennewick 99336
 GM Bob Smith PD Aaron Smith SM Delores Smith
 Richland/Kennewick/Pasco Arbitron 2.2% 800p
 Walla Walla Willhight 4.7%

An AM or FM affiliated sister station(s) in the same market area is shown following the ownership information. If the station is in a Local Marketing Agreement (LMA), formal or informal, the listing will read "LMA with:" If two or more stations have a Sales Marketing Agreement (SMA), the listing will read "SMA with:"

The phone number given is for the station's business office. This is followed by the fax number. If we do not have a phone number, the area code is given.

Up to two addresses are shown. The mailing address is listed first, followed by the shipping address. The city and state are the city and state of license unless otherwise listed.

The names of key management personnel are listed for the following positions: General Manager (GM), Program Director (PD) and Sales Manager (SM).

The market area or areas served by the station are listed here. The station's primary market area appears on the first line. Its secondary market, if any, appears on the next line. If ratings are available in the market listed, they are shown here. See **ABOUT RATINGS** for a detailed explanation of the ratings information provided.

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The M Street Database**Format Codes**

As the broadcast industry itself evolves, so do radio station formats. Classifications and definitions are amended from time to time to reflect current trends. Here is the current set of format classifications in use:

AC Adult Contemporary

An adult-oriented pop/rock station, often with a greater emphasis on non-current music. AC-OL would be a gold-based AC.

AH Hot AC or "Adult CHR"

A more up-tempo contemporary hits format, with little or no rock or younger targeted R&B.

AP Adult Alternative

Eclectic rock, often with wide variations in musical style. Some times called "AAA."

AR Album - Rock

Mainstream rock & roll. Can include more guitar-oriented "heavy metal", classic rock and modern rock.

AS Adult Standards

Standards and older, non-rock popular music (1940-1980). Often includes softer current popular music.

BG Black Gospel**CH Contemporary Hit Radio (Top-40)**

Current popular music, often encompassing a variety of rock styles. CH-RB would be Dance-CHR, CH-AR would be Rock based CHR, CH-NR would be New Rock or Modern Rock based CHR.

CR Classic Rock

Rock oriented oldies of the 60's, 70's and 80's. May play some current music by "classic" artists.

CW Country

Country music, including contemporary and traditional styles. CW-OL would be country oldies.

CZ Classic Hits

Popular rock and pop hits of the 60s, 70s, and 80s with an emphasis on the 70s.

DR Drama

Radio dramas, often pre-1950.

ET Ethnic

Programs primarily in languages other than English. Often brokered and/or block-programmed.

EZ Easy Listening

Primarily instrumental cover versions of popular songs. More uptempo varieties of this format include soft rock originals. May also be mixed with "Smooth Jazz" or Adult Standards.

FA Fine Arts - Classical

Fine arts ("classical") music, often including opera, theater, and/or culture-oriented news and talk.

FF French

French-language programming.

FX Farm News and Talk**JZ Jazz**

Mostly instrumental, often mixed with Soft AC. This format classification includes both traditional jazz and what is called "Smooth Jazz" or "New AC."

MA Modern AC

The softer end of modern rock mixed with female-targeted popular music.

NR New Rock - Modern Rock

Young-end mainstream current rock often mixed with 80s modern rock.

NX News

All-news, either local or network in origin. Also in format description if a significant block of time is devoted to news.

OL Oldies

Popular music, usually rock, with 80% or greater non-current music. CW-OL indicates country oldies; RB-OL, R & B oldies.

(Continued next page)

Right on Target, Each Morning.



MStreet Daily

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Editor: Tom Taylor (609) 883-0321
Page 1 of 4

Radio One buys modern rock \$100 in Philadelphia
for \$80 million. Alfred Liggins, who runs the country's largest African-American managed group, says he'll keep the alternative format as long as it makes economic sense and run it out of the same Jenkintown, Pa. address where he's got young-urban WPHL. \$80 million is the richest price ever paid for a station in Philly (Beasley sold WDAS-FM for \$103 million in 1996, and Jim Duncan's allocations for WJZ and WYSP in the Infinity-Westinghouse deal of 1996 are both higher). But until last week WPHL owner Dan Lerner had spurned all offers. "It's in his 70s and Radio One has the right mix with the right offer. (Katz is at least one other local owner weighing a bid)," Peter Handy of Star Media Group brokered. Some facts about the deal: —

- \$80 million is 16-18 times the estimated 2000 cash flow.
- Radio One (Liggins figures stock value in the Philadelphia market is now \$70 million to \$75 million)
- WPHL's on track to bill \$9 million this year and \$10.8 million next year — helped by the recent flip of WJZ to rhythmic oldies and a surge in revenue owed by modern rock's affinity for "old-com" business.
- Radio One will lease lower space from Lerner's Greater Media Radio, but ask the current studios in Media, Pa. Note that this "Greater Media Radio" is different from the Greater Media that owns stations in Philly, Boston & Detroit.
- WPHL Media, Pa. (100.3 MHz) is a directional Class B facility that protects KATZ's "Z100" in the New York market (WYZZ, Newark, NJ is also at 100.3 MHz).
- Dan Lerner is the principal owner of WPHL, and it's his only station. Consultants (and WPHL) expect Scott Shannon and his one employee have smaller pieces of equity.
- WYZZ moved 3.1 to 3.8 12- total week in the Summer Arbitron. In the 18-34 demo, it jumped 6.7 to 7.4 — double its 18-34 share just one year earlier.
- Radio One says the deal will add 10 cents to its after-tax cash flow in 2000. Radio One stock (RNOV) gained 1/4 to \$68. Sirin Liggins' rights: some Clear Channel spinoffs.

Clear Channel concentrates 100% of its rep business at Katz. Interco's Ralph Guid — who's losing the bidding of 225 stations — calls it a "practical business decision" by Clear Channel. M Street picked up speculation about the swing last month (November 11th Daily). Turns out they were negotiating terms at the time. Now it's come to pass: The Channel-owned Clear Channel Radio Sales will fold as Clear Channel supports all its rep business with Katz, which its Christmas Party in New York City on the day of the big NYRRAD

They workshopped the 1,000 feet to their death in North Carolina. They were working on a 1,500-foot tower owned by ALPHA Inc's WPLJ business when there was an accident with the cables that hoisted them up. The Charlotte Observer says the Friday incident also is a family tragedy. Wanda Zorman watched from the ground in horror as her husband (40-year-old Daniel Foster Zorman) and her 18-year-old son (18-year-old Daniel Brooks) fell along with 18-year-old friend Charles Strively. Ms. Zorman was treated for shock and burns to her hands. She'd touched the cables that apparently came off the masted winch at the bottom of the tower. Zorman owned Quality Tower Painting of Rad Oak, VA.

WPLJ, NY's contest winner passes out in the bank vault. After grabbing \$70,000 during 4 minutes and 20 seconds at Austria Federal Savings, Victor Nevagic, 47, hyperventilated and blacked out and had to be rushed to the hospital in an ambulance. The good news: he's okay (says the New York Times). And WPLJ added another \$20,000, since Nevagic had 40 seconds to go in his five minutes of time.



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PT Pre-teen

Music, drama or readings intended primarily for a pre-teen audience.

RB R & B - Urban

Can cover a wide range of musical styles (R&B, blues, dance, rap), often called "Urban Contemporary."

RC Religious - Contemporary

Christian adult contemporary music.

RG Religious - Gospel

Traditional religious music; can be mixed with black-oriented (BG) or country-oriented "southern gospel" (SG).

RL Religion

Local or syndicated religious talk programming, sometimes mixed with music.

SA Soft Adult Contemporary

Lite Adult Contemporary music, soft rock originals; can also be mixed with Adult Standards or classic hits.

SB Soft Urban Contemporary

Soft R & B sometimes mixed with "Smooth Jazz," often heavy in oldies.

SG Southern Gospel

Country flavored gospel music, also includes the "Christian Country" or "Positive Country" format.

SS Spanish

Spanish-language programming. Spanish-language equivalents of English formats include SS-CH (hits), SS-RA (ranchero music), SS-AC ("modern" music), SS-TP (salsa, tropical), SS-TJ (tejano), SS-MX (regional Mexican), SS-SA (romatica) or SS-VA (variety), as well as formats such as SS-EZ or SS-NX-TK, which match English language formats.

SX Sports

Listed only if all or a substantial block of a broadcast day is devoted to play-by-play, sports news, interviews or telephone talk.

TK Talk

Talk, either local or network in origin; can be telephone-talk, interviews, information, or a mix.

MT Financial Talk

All financial or "Money-Talk."

VA Variety

Incorporating four or more distinct formats, either block-programmed or simultaneously.

<u>CODE</u>	<u>DESCRIPTION</u>	<u>EXAMPLE</u>
Z	Station is currently off the air	
r:	Relays another station's programming	AC r: WIII-92.3 (The station is relaying the AC format from radio station WIII which is on 92.3 FM.)
s	Simulcasts another station	ACs (The station is simulcasting it's sister station's format.)
*	Non-commercial format	RL* (Public or not-for-profit stations.)
&	Satellite programmed	TK& (Programming provided primarily from satellite networks.)
X-Y	Formats combined	CW-AC (Country and AC are intermixed.)
X/Y	Formats alternate (dayparted)	OL/CW/AR (Example: OL-mornings, CW-middays, AR-evenings)
m	Morning	When an "m" is added, the programming is in the morning.
n	Night	When an "n" is added, the programming is in the night.
l	Late night	When an "l" is added, the programming is late night.
-	Format is about to change or is unavailable	
cp-new	Construction permit for a new station	Look for future information weekly in the M Street Journal and daily in the M Street Daily .

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M Street format data produces the following format information:

November 1999

Primary Format		Total	Commercial	Non-Comm.	% AM	% FM	Simulcast		Network	
1	Country	2,320	2,306	14	33%	67%	276	12%	546	24%
2	News, Talk	1,695	1,159	536	66%	34%	278	16%	604	36%
3	Adult Contemporary	784	775	9	19%	81%	51	7%	181	23%
4	Oldies	771	766	5	38%	62%	59	8%	281	36%
5	Religion (Teaching, Variety)	703	363	340	49%	51%	88	13%	134	19%
6	Adult Standards	602	595	7	85%	15%	44	7%	379	63%
7	Spanish	600	536	64	59%	41%	85	14%	70	12%
8	Contemporary Christian	529	167	362	13%	87%	64	12%	169	32%
9	Top-40 (CHR)	439	401	38	3%	97%	33	8%	1	0%
10	Variety	436	39	397	11%	89%	24	6%	-	-
11	Soft Adult Contemporary	386	382	4	20%	80%	29	8%	115	30%
12	Alternative Rock	361	95	266	3%	97%	11	3%	-	-
13	Adult Hits, Hot AC	329	325	4	4%	96%	14	4%	80	24%
14	Classic Rock	315	314	1	4%	96%	20	6%	56	18%
15	Southern Gospel	313	269	44	69%	31%	16	5%	74	24%
16	Rock	289	280	9	2%	98%	16	6%	-	-
17	Black Gospel	271	257	14	84%	16%	22	8%	36	13%
18	Sports	256	256	-	94%	6%	25	10%	172	67%
19	Classic Hits	223	222	1	7%	93%	19	9%	34	15%
20	Urban, R&B	186	166	20	16%	84%	8	4%	-	-
21	Classical, Fine Arts	146	38	108	3%	97%	25	17%	13	9%
22	Jazz	139	72	67	7%	93%	5	4%	21	15%
23	New Rock, Modern Rock	136	136	-	4%	96%	17	13%	9	7%
24	R&B Oldies	127	127	-	27%	73%	6	5%	27	21%
25	Urban AC	112	112	-	29%	71%	9	8%	34	30%
26	Ethnic	92	82	10	75%	25%	6	7%	-	-
27	Gospel	79	42	37	51%	49%	13	16%	4	5%
28	Modern AC	74	74	-	0%	100%	7	9%	-	-
29	Pre-Teen	51	51	-	96%	4%	5	10%	46	90%
30	Easy Listening	42	34	8	21%	79%	2	5%	-	-
not available or changing		4	3	1	25%	75%	-	-	-	-
Total operating stations		12,810	10,444	2,366	37%	63%	1277	10%	3086	24%
Stations off the air		103	(73 AM and 30 FM)		71%	29%				
Construction permits		385	(53 AM and 332 FM)		14%	86%				
Total stations and CP's		13,298	(4884 AM and 8414 FM)		37%	63%				

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Stations are counted in their primary format only.

Simulcast and Network totals are for stations with a primary Simulcast or Network programming source.

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M Street format counts for AM & FM stations

Counts as of November 1999

AM			FM		
Rank	Primary Format	Count	Rank	Primary Format	Count
1	News, Talk	1,118	1	Country	1,563
2	Country	757	2	Adult Contemporary	633
3	Adult Standards	512	3	News, Talk	577
4	Spanish	352	4	Oldies	481
5	Religion (Teaching, Variety)	345	5	Contemporary Christian	461
6	Oldies	290	6	Top-40 (CHR)	425
7	Sports	241	7	Variety	389
8	Black Gospel	227	8	Religion (Teaching, Variety)	358
9	Southern Gospel	216	9	Alternative Rock	349
10	Adult Contemporary	151	10	Adult Hits, Hot AC	317
11	Soft Adult Contemporary	79	11	Soft Adult Contemporary	307
12	Ethnic	69	12	Classic Rock	303
13	Contemporary Christian	68	13	Rock	283
14	Pre-Teen	49	14	Spanish	248
15	Variety	47	15	Classic Hits	208
16	Gospel	40	16	Urban, R&B	156
17	R&B Oldies	34	17	Classical, Fine Arts	141
18	Urban AC	32	18	New Rock, Modern Rock	131
19	Urban, R&B	30	19	Jazz	129
20	Classic Hits	15	20	Southern Gospel	97
21	Top-40 (CHR)	14	21	R&B Oldies	93
22	Classic Rock	12	22	Adult Standards	90
	Alternative Rock	12	23	Urban AC	80
	Adult Hits, Hot AC	12	24	Modern AC	74
25	Jazz	10	25	Black Gospel	44
26	Easy Listening	9	26	Gospel	39
27	Rock	6	27	Easy Listening	33
28	New Rock, Modern Rock	5	28	Ethnic	23
	Classical, Fine Arts	5	29	Sports	15
30	Modern AC	0	30	Pre-Teen	2
	not available or changing	1		not available or changing	3
	Total operating stations	4,758		Total operating stations	8,052
	Silent	73		Silent	30
	Construction Permits	53		Construction Permits	332

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FORMAT STATISTICS

M Street format data produces the following format information

For commercial stations:

Counts as of November 1999

Primary Format	1992	1993	1994	1995	1996	1997	1998	1999
1 Country	2,552	2,612	2,642	2,613	2,525	2,491	2,368	2,306
2 News, Talk	648	841	1,197	1,036	1,116	1,111	1,131	1,159
3 Adult Contemporary	1,648	1,563	923	1,052	952	902	844	775
4 Oldies	730	734	714	710	738	755	799	766
5 Adult Standards	412	421	435	470	499	551	561	595
6 Spanish	331	361	401	427	463	474	493	536
7 Top-40 (CHR)	578	441	358	318	333	358	379	401
8 Soft Adult Contemporary	315	332	345	347	337	346	368	382
9 Religion (Teaching, Variety)	459	429	426	418	424	404	356	363
10 Adult Hits, Hot AC	see AC	see AC	242	256	283	260	281	325
11 Classic Rock	201	218	264	306	349	240	282	314
12 Rock	316	317	309	301	273	262	266	280
13 Southern Gospel	108	191	204	239	248	255	273	269
14 Black Gospel	96	111	122	147	166	208	238	257
15 Sports	see talk	see talk	106	148	156	220	251	256
16 Classic Hits						172	192	222
17 Contemporary Christian	124	139	125	132	142	159	164	167
18 Urban, R&B	212	213	203	184	183	169	171	166
19 New Rock, Modern Rock	see alt.	see alt.	54	141	147	137	145	136
20 R&B Oldies	see R&B	see R&B	39	47	44	46	56	127
21 Urban AC	101	108	86	116	121	134	127	112
22 Alternative Rock	75	108	94	80	110	94	96	95
23 Ethnic	54	60	69	67	64	75	77	82
24 Modern AC						70	79	74
25 Jazz	52	45	43	80	89	92	88	72
26 Pre-Teen	3	13	19	28	33	40	37	51
27 Gospel	50	45	49	45	40	37	45	42
28 Variety	72	68	63	62	54	50	43	39
29 Classical, Fine Arts	48	45	44	39	41	44	40	38
30 Easy Listening	171	116	106	61	57	49	39	34
not available or changing	15	14	6	10	4	2	3	3
Total operating stations	9,371	9,545	9,688	9,880	9,991	10,207	10,292	10,444

Stations off the air 352 345 369 308 270 143 102 96

Stations are counted in their primary format only.

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M Street format data produces the following format information

For non-commercial stations:

Counts as of November 1999

Primary Format		1992	1993	1994	1995	1996	1997	1998	1999
1	News, Talk	151	190	245	272	410	456	490	536
2	Variety	386	384	381	380	377	376	393	397
3	Contemporary Christian	56	75	91	122	161	230	299	362
4	Religion (Teaching, Variety)	318	337	358	366	363	335	326	340
5	Alternative Rock	267	274	276	281	276	272	270	266
6	Classical, Fine Arts	275	267	239	230	130	117	112	108
7	Jazz	72	75	76	79	78	69	67	67
8	Spanish	29	30	32	36	39	42	58	64
9	Southern Gospel	8	9	12	12	19	30	40	44
10	Top-40 (CHR)	66	65	57	53	41	43	39	38
11	Gospel	7	7	10	10	9	23	32	37
12	Urban, R&B	34	35	31	33	29	27	22	20
13	Country	8	6	6	9	12	14	14	14
14	Black Gospel	3	3	2	4	4	10	12	14
15	Ethnic	9	9	10	9	8	7	8	10
16	Rock	10	9	10	10	9	10	10	9
17	Adult Contemporary	19	20	18	20	16	15	9	9
18	Easy Listening	11	10	9	9	8	8	8	8
19	Adult Standards	0	1	2	3	4	7	8	7
20	Oldies	1	1	2	1	4	5	4	5
21	Adult Hits, Hot AC	see AC	see AC	1	2	2	2	4	4
22	Soft Adult Contemporary	2	1	1	2	2	3	3	4
23	Classic Hits						1	1	1
24	Classic Rock	1	2	3	3	2	2	1	1
25	Modern AC						0	0	0
26	New Rock, Modern Rock	0	0	0	0	0	0	0	0
27	Pre-Teen	0	0	0	0	0	0	0	0
28	R&B Oldies	0	0	0	0	0	0	0	0
29	Sports	0	0	0	0	0	0	0	0
30	Urban AC	1	1	1	1	1	0	0	0
	not available or changing	12	15	4	7	1	2	6	1
Total operating stations		1,746	1,826	1,877	1,954	2,005	2,106	2,236	2,366

Stations off the air	23	23	40	34	29	26	11	7
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M Street commercial station format data produces the following information
Large Markets Vs. Small Markets

Counts as of November 1999

Primary Format	Total Arbitron		Not	Arbitron Markets		Total	%	RTG	Non-Arbitron Markets		Total	%
	2,306	734		32%	1,572				86%	1,572		
1 Country	1,159	715	62%	444	38%	715	12.9%	11.5%	1	Country	1,572	32.3%
2 News, Talk, Business	715	269	33%	516	67%	361	6.4%	7.6%	2	Adult Contemporary	516	10.6%
3 Adult Contemporary	715	269	33%	516	67%	361	6.4%	7.6%	3	News, Talk, Business	444	9.1%
4 Oldies	715	338	44%	428	55%	338	6.0%	4.1%	4	Oldies	428	8.8%
5 Adult Standards	715	338	44%	428	55%	338	6.0%	4.1%	5	Adult Standards	262	5.4%
6 Spanish	715	338	44%	428	55%	338	6.0%	4.1%	6	Top-40 (CHR)	187	3.8%
7 Top-40 (CHR)	715	338	44%	428	55%	338	6.0%	4.1%	7	Adult Hits, Hot AC	183	3.8%
8 Soft Adult Contemporary	715	338	44%	428	55%	338	6.0%	4.1%	8	Adult Contemporary	175	3.6%
9 Religion (Teaching, Variety)	715	338	44%	428	55%	338	6.0%	4.1%	9	Spanish	170	3.5%
10 Adult Hits, Hot AC	715	338	44%	428	55%	338	6.0%	4.1%	10	Southern Gospel	130	2.7%
11 Classic Rock	715	338	44%	428	55%	338	6.0%	4.1%	11	Classic Rock	92	2.0%
12 Rock	715	338	44%	428	55%	338	6.0%	4.1%	12	Classic Hits	86	1.8%
13 Southern Gospel	715	338	44%	428	55%	338	6.0%	4.1%	13	Top-40 (CHR)	79	1.6%
14 Rock Gospel	715	338	44%	428	55%	338	6.0%	4.1%	14	Religion (Teaching, Variety)	73	1.5%
15 Sports	715	338	44%	428	55%	338	6.0%	4.1%	15	Black Gospel	63	1.3%
16 Classic Hits	715	338	44%	428	55%	338	6.0%	4.1%	16	Sports	59	1.2%
17 Contemporary Christian	715	338	44%	428	55%	338	6.0%	4.1%	17	Contemporary Christian	54	1.1%
18 Urban, R&B	715	338	44%	428	55%	338	6.0%	4.1%	18	Contemporary Christian	54	1.1%
19 New Rock, Modern Rock	715	338	44%	428	55%	338	6.0%	4.1%	19	Alternative Rock	47	1.0%
20 R&B Oldies	715	338	44%	428	55%	338	6.0%	4.1%	20	R&B	36	0.7%
21 Urban AC	715	338	44%	428	55%	338	6.0%	4.1%	21	Urban, R&B	22	0.5%
22 Alternative Rock	715	338	44%	428	55%	338	6.0%	4.1%	22	Gospel	20	0.4%
23 Ethnic	715	338	44%	428	55%	338	6.0%	4.1%	23	New Rock, Modern rock	20	0.4%
24 Modern AC	715	338	44%	428	55%	338	6.0%	4.1%	24	Variety	19	0.4%
25 Jazz	715	338	44%	428	55%	338	6.0%	4.1%	25	Variety	18	0.4%
26 Pre-Teen	715	338	44%	428	55%	338	6.0%	4.1%	26	R&B Oldies	17	0.3%
27 Gospel	715	338	44%	428	55%	338	6.0%	4.1%	27	Alternative Rock	14	0.3%
28 Variety	715	338	44%	428	55%	338	6.0%	4.1%	28	Classical, Fine Arts	13	0.3%
29 Classical, Fine Arts	715	338	44%	428	55%	338	6.0%	4.1%	29	Gospel	9	0.2%
30 Easy Listening	715	338	44%	428	55%	338	6.0%	4.1%	30	Classical, Fine Arts	6	0.1%
not available or changing	715	338	44%	428	55%	338	6.0%	4.1%	not available or changing	not available or changing	3	0.0%
Silent	715	338	44%	428	55%	338	6.0%	4.1%	Silent	not available or changing	3	0.1%
Total stations	10,540	5,072	54%	4,963	46%	5,072	48%	5.0%	Total stations	4,963	49	1.0%

RTG = Arbitron 6am to 12 midnight average quarter hour share, based on all markets Spring 1999
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M Street Format Trends from 1989 to 1999

Counts as of November 1999

Stations by primary format												89/99
Commercial												
FORMAT	1989	90	91	92	93	94	95	96	97	98	99	+/-
Country	2448	2452	2457	2552	2612	2642	2613	2525	2491	2368	2306	-142
Adult Contemporary	2058	2135	2088	1963	1895	1784	1655	1572	1508	1493	1482	-576
News, Talk, Business, Sports	308	405	527	648	841	1028	1184	1272	1331	1382	1415	1107
Religion (Teaching & Music)	696	745	799	837	915	926	981	1020	1063	1076	1098	402
Oldies & Classic Hits	545	659	704	731	734	714	710	738	927	991	988	443
Rock (Album, Modern, Classic)	365	419	529	592	643	721	828	879	803	868	899	534
Spanish & Ethnic	313	342	370	385	421	470	494	527	549	570	618	305
Adult Standards	332	383	408	412	421	435	470	499	551	561	595	263
Urban, Black, Urban AC	284	294	311	313	321	328	347	348	349	354	405	121
Top-40 (CHR)	951	824	675	578	441	358	318	333	358	379	401	-550
Jazz	64	68	53	52	45	43	80	89	92	88	72	8
Pre-Teen	0	3	4	3	13	19	28	33	40	37	51	51
Variety	134	97	81	72	68	63	62	54	50	43	39	-95
Classical, Fine Arts	49	52	51	48	45	44	39	41	44	40	38	-11
Easy Listening	328	240	210	171	116	106	61	57	49	39	34	-294
Comedy	1	1	0	0	0	1	0	0	0	0	0	-1
Off Air	112	210	308	352	345	369	308	270	143	102	96	-16
Changing formats /not available	266	115	19	15	14	6	10	4	2	3	3	-263
Total stations	9254	9444	9594	9724	9890	10057	10188	10261	10350	10394	10540	1286
Non-Commercial												89/99
FORMAT	1989	90	91	92	93	94	95	96	97	98	99	+/-
Religion (Teaching & Music)	302	332	352	391	431	473	514	556	628	709	797	495
News, Talk, Business, Sports	11	31	104	151	190	245	272	410	456	490	536	525
Variety	387	379	391	386	384	381	380	377	376	393	397	10
Rock (Album, Modern, Classic)	226	242	291	278	285	289	294	287	284	281	276	50
Classical, Fine Arts	306	320	297	275	267	239	230	130	117	112	108	-198
Jazz	37	75	72	72	75	76	79	78	69	67	67	30
Spanish & Ethnic	34	34	37	38	39	42	45	47	49	66	74	40
Top-40 (CHR)	71	71	73	67	65	57	53	41	43	39	38	-33
Urban, Black, Urban AC	32	37	34	35	36	32	34	30	27	22	20	-12
Adult Contemporary	16	17	21	21	21	20	24	20	20	16	17	1
Country	8	7	7	8	6	6	9	12	14	14	14	6
Easy Listening	7	8	11	11	10	9	9	8	8	8	8	1
Adult Standards	0	1	0	0	1	2	3	4	7	8	7	7
Oldies & Classic Hits	0	0	0	1	1	2	1	4	6	5	6	6
Pre-Teen	0	0	0	0	0	0	0	0	0	0	0	0
Comedy	0	0	0	0	0	0	0	0	0	0	0	0
Off Air	4	2	23	23	23	40	34	29	26	11	7	3
Changing formats /not available	125	80	13	12	15	4	7	1	2	6	1	-124
Total stations	1566	1636	1726	1769	1849	1917	1988	2034	2132	2247	2373	807

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The M Street Radio Directory contains estimates of average-quarter-hour-audience size and market audience share from surveys taken by the above ratings companies. The figures we show are taken from the latest survey published before our deadlines. The particular survey used in each market is shown in **The M Street RADIO MARKETS** section, but not in the individual station listings. Ratings are not shown for stations that did not meet minimum reporting requirements or for stations that show up with ratings in markets outside of their primary market area.

The majority of these estimates were compiled through surveys conducted by The Arbitron Company which reports its estimates on a quarterly basis. A number of radio markets are surveyed by Willhight Radio Research. Willhight and Eastlan's surveys do not always coincide with the Arbitron survey periods. The dates of the Willhight and Eastlan surveys are given in the **MARKETS** section.

The term "ratings" is used to describe the audience figures published in the M Street Radio Directory. However, "audience share" and "audience estimate" are more accurate terms. The published numbers express the size of a station's audience in a

theoretical "average-quarter-hour" (AQH) between 6:00 a.m. and 12:00 midnight in two ways: 1) As a percentage of all radio listeners twelve years old or older (12+) and 2) as a number of persons 12+ listening.

These figures highlight some relative strengths and weaknesses of the stations competing in a market but tell only a small portion of the story of competition in a market.

These 12+ Monday-Sunday 6:00 a.m. to 12:00 midnight AQH estimates are not the only audience data that ratings firms provide. Far more specific estimates that report the size of a station's AQH audience at different times of the day and detail how radio listening differs by age and gender are available directly from the ratings firms. Also available are cumulative audience estimates which report how many people listen to a radio station over time periods longer than a quarter-hour. These more specific figures are not included because of their volume and because the ratings firms would have little to sell if they were published. For more information contact the ratings company directly.

RADIO RATINGS - A NOT ALWAYS ACCURATE BENCHMARK

by Steve Apel

How Healthy Is A Radio Station?

There are many reasons for wanting to know how healthy a business is radio and, in particular, a specific radio station.

For the broadcast investor, the question is whether a radio station is delivering a respectable share of the market and whether there's potential for growth or a growing threat from competitors. Advertisers want to know who specific radio stations reach in order to plan their campaigns. They also want a gauge of how many people are reached as one factor in establishing what is the "right" price for access to that audience. Radio programmers rely on ratings to better understand the competitive structure of their markets and gain knowledge of listening patterns as a base in planning programming and marketing strategy. For others, with even a casual interest in radio, the ratings represent a kind of "score card," a top-level measure of who's winning and who's losing.

Radio's audience ratings provide this information. But, as with almost every other type of statistical information, radio ratings have limitations and drawbacks. Consider these when evaluating the numbers.

The Nuts and Bolts of the Ratings

The basic methods of producing radio audience estimates haven't changed significantly in the last 35 years. The concept is simple. Draw a random sample of the population in an area. Contact these people by telephone and (in many cases) follow-up with a mailed diary questionnaire. Then, through the phone or the diary, ask them what stations they're listening to. Apply simple math to project these answers over the entire population. Seems straightforward. But as with many seemingly simple things, the devil is in the details.

Problem 1: Sample Size and Margin of Error

The size of the sample can, of itself, affect the projected audience estimates. All estimates projected from a sample are subject to a margin of error. As a result, any ratings estimate is really the mid-point of a range of numbers above and below the published figure. Since this margin of error can differ for every estimate it is rarely published. Reports issued by the audience ratings firms detail complex formulas to use in determining margin of error. While these formulas can account for some of the error caused by variance in sample size, they can't correct for other problems that are common in nearly every market research study.

Problem 2: Gaining A Random Sample That Represents Everyone

It's practically impossible to gain a truly random sample that represents the entire population. Some people refuse to cooperate with research surveys. If the people who refuse to cooperate share certain characteristics that relate to listening to a specific radio format their listening habits will never be reflected in the ratings. As a result, audience estimates for stations in that format will be understated. This is the end result of what is known in research circles as "non-response bias."

Problem 3: Gathering Accurate Reports About A Low Commitment Behavior

Even if "non-response bias" is overcome by gaining full cooperation (something that even laws compelling people to answer the U.S. Census can't achieve), radio's existence as an activity that's often secondary to most people's lives makes it difficult to learn exactly what stations they're listening to. Some people switch stations so often or are so unconcerned with radio they can't name the stations they tune-in. As a result their reports of listening may be inaccurate.

Where These Problems Appear

The U.S.'s dominant radio audience measurement firm is Arbitron. In Canada it's The BBM Bureau of Measurement. Both firms gather information about radio listening through diaries. Diaries are pamphlet-sized books designed to allow respondents to make notes of details of their radio listening over a seven day period.

Willhight Radio Research measures radio audiences mainly in the Pacific Northwest through telephone interviews that ask about the radio stations people listened to in a period preceding the phone call.

Both means of gaining information have flaws that lead to the "non-response bias" and reporting inaccuracies mentioned earlier.

Many people are reluctant to answer the questions posed by a stranger through the "cold call" that Willhight uses. The call may be from a company that they've not heard of before. Or it may have reached them at an inconvenient time.

The Arbitron and BBM diaries, which people are asked to keep after an awareness of the research company is achieved (and often after getting a small monetary incentive) would seem to be better means of combating "non-response." But diaries have their problems. Keeping a diary record of radio listening for a week can be a demanding task. Many listeners decline to participate in a diary survey for this reason. Others make detailed entries in their diaries when they first receive them but then lose interest. These people either report less radio use as the seven days progress or fail to return their diary to the ratings company.

Ratings Surveys May Measure Awareness Instead Of Listening

In both the telephone recall method and the diary survey, people are asked for information they can't always supply. It's possible to listen to a radio station (even the station one likes the most) without knowing what station it is. But in answer to a simple question about a routine activity such as radio listening, people are reluctant to answer "don't know." As a result, they often report the first stations that come to mind whether they listen to them or not. Because of this, the stations reported in a ratings survey may be the ones with the greatest name recognition rather than the ones actually listened to.

Some ratings estimates may have more to do with listener awareness of a particular radio station than with actual listening to the station.

Although the people who agree to keep a radio listening diary are supposed to make entries in the diary as they listen to radio, there is no guarantee that they will. There is evidence that suggests many people make entries in their radio listening diary some time after the actual radio listening has occurred.

These diaries are attempts to "reconstruct" listening. They contain reports of what people think they listened to rather than an accurate record of radio listening. People's memories are not perfect. This is especially true regarding an "low-commitment" behavior such as radio listening that can often be secondary to some other activity taking place simultaneously such as driving or working in an office.

Since people pay no money for listening to radio and can switch stations easily they may not recall all details of their listening. As a result, people may report listening to the radio stations they are most aware of and neglect to mention stations that have a lower profile, although they actually listen to these stations. In this scenario, a station's promotion and advertising activity more than its programming strategy can drive its audience ratings.

The telephone recall method appears to be most vulnerable to this kind of inaccurate reporting. Since people are being asked about radio listening they had no idea they would need to report the pressure to have an answer where none is available exists. It's like in school when the teacher would throw a surprise quiz your way.

Inaccurate Reports From Listeners Are Another Source of Error

Even when ratings survey participants make entries to their diaries while listening to radio and even when those who supply diary or telephone answers after listening have good recall skills, inaccuracies can still exist. This is because ratings surveys depend upon un-aided response. People must volunteer information on the stations they listen to.

Lack of knowledge, confusion or carelessness may cause listeners to supply inaccurate information. In ratings diary reports people have transposed call letters (calling WXYZ WYXZ for example), invented call sign and frequency combinations that don't exist (a person who listens to both KAAA-FM 99 and KBBB-FM 88 may enter KAAA-FM 88 in a diary), and confused AM and FM stations with the same call sign (saying they heard WXXX-FM when they in fact listen to WXXX-AM).

An Electronic Fix for Some of These Problems is Promised

Arbitron has tested a system that will electronically record the radio stations a respondent listens to. Such a system, if it can be proven to work over a wide range of markets and listening environments, holds the promise of yielding a measure of actual radio listening.

An electronic system would overcome any tendency for ratings to be driven solely by advertising and promotion as well as eliminate the errors caused by inaccurate or incomplete respondent reports of radio listening. In addition, if respondents view the system as less demanding than keeping a diary or answering telephone interview questions it could improve response rates and lead to more representative samples.

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What Were the Stations that Helped Change Radio Programming in the '90's?

by Sean Ross

Sean Ross is the editor of the four Billboard Airplay Monitor music publications, and can be reached at (212) 536-5264

or by mail at 1515 Broadway, 14th Floor, New York, NY 10036.

No format escaped the '90s untouched. Country boomed, then busted. Top 40 disappeared almost off the face of the earth, then rebounded. AC began the decade playing Michael Bolton and ended it playing AC/DC (in a few cases, anyway). R&B, which had only begun to fragment in 1990, sported at least three discernable types of urban AC. And modern rock went from being the smallest piece of the rock pie in 1990 to, in certain markets, the largest.

So what were the stations that helped change radio programming during the '90s? Some were powerhouses that managed to reinvent themselves. Some were known and beloved only by aircheckers and were a year (or 10) ahead of their time. While it's hard to come up with a definitive list (this is, after all, only a 1,000-page directory), these are the author's nominations (restricted to music stations, since that's his area of expertise). I hope readers have a good time debating the sins of omission (none of them intentional), and I'm interested in hearing your nominations, at sross@airplaymonitor.com.

AC

The hot ACs usually get all the ink, but Don Kelley's early '90s WMJX Boston deserves some attention, too. At a time when soft AC was getting even softer (the result of hundreds of former easy listening stations pouring into the format), WMJX kept its texture soft but switched its musical focus to the '80s and '90s, not unlike what's happening with WLTW New York today. (Nearby WPLM, one of the first super-soft ACs, also deserves some recognition, as does KJUL Las Vegas, for showing what adult standards could do on FM).

As for the hot ACs, they happened in several waves. One was the early-'90s hot AC group that helped show that Pat Benatar was more important to the current AC listener than Neil and Barbra (KHMx Houston, WPLJ New York, WMTX Tampa, Fla.). Another was the first wave of modern AC stations of the mid-'90s (KALC Denver, KFMB-FM San Diego, and KYSR Los Angeles). The most recent were the rock ACs that updated the WPLJ formula, sometimes with AC titles as unlikely as "You Shook Me All Night Long" (most notably WMVX Cleveland,

but now a slew of stations in both Clear Channel and Chancellor).

Even at the beginning of the '90s, there were stations trying some form of the rhythmic AC format that would eventually develop both into "Jammin' Oldies" and WKTU New York's gold-based rhythmic top 40 format. WBMX Boston and WYXR Philadelphia were the most successful at the time. And as proof that they were on target, both changed format and saw their hole successfully filled (in Boston's case, with the similar WQSX; in Philly's, with "Jammin' Gold" WEJM).

COUNTRY

When the decade started, WSIX Nashville was already established in its more current-intensive approach to a traditionally gold-driven format. By 1992-93, it had become the template. And WSIX had a morning show in most dayparts, something that would become a lot less unusual in all formats as the '90s went on.

Also worth mentioning is WTDR (Thunder Country) Charlotte, N.C., for its initial country/classic rock hybrid, although WTDR didn't really become successful until it became somewhat more conventional (along the lines of a second-generation country outlet like KMLE Phoenix).

Once "hot new country" became the rule in country radio, it was harder to find stations that stood out. Heritage country stations were modified in hopes of pre-empting some of the new country stations. Even when country stations spun off their own "young country" duopoly partners, the difference between the two outlets was usually more presentational than musical (and once WBOB Minneapolis and Alliance's Young Country outlets came along, it wasn't that unusual to hear even heritage country stations using attitude liners). But WXRb Pittsburgh, WDSY's short-lived duopoly partner, was one of the few stations with edgier music and presentation than the rest. And one of the few that actually reached out to teens.

In the late '90s, with so many country stations having become the alternate-universe soft ACs that defined the format a decade ago, a lot of the best country stations are those that managed to

- continued on next page -

hold on to parts of the higher-profile, higher-energy template of the early '90s. Today's KMLE or KEEY (K102) Minneapolis aren't groundbreaking. They're just proof that there's still a demand for some sort of hit-driven, higher-energy country format. KPLX (the Wolf) Dallas does the same, but it's also managed to bring some alternative country/"Americana" titles to the mainstream by positioning them as "Texas Country," not as esoterica.

OLDIES

The most-copied oldies station of the '90s would have to be Mike Phillips' KRTH (K-Earth 101) Los Angeles. Throughout the '80s, whenever you interviewed an oldies PD, you could pretty much count on the phrase "Just because we play old songs doesn't mean we live in the past" working its way into the conversation somewhere. KRTH's loving re-creation of Bill Drake's Boss-era KHJ sounded a lot more contemporary than most of what those other PDs had managed to come up with. And, for better or worse, it ended up being cloned in some markets where nobody had used the Drake jingles, even in 1967.

But the oldies station that shook things up was KCBQ San Diego under Rich Brother Robbin, which, in 1993, tapped into its own legacy and did '70s/'80s oldies—heretofore reviled by most major operators—for a new generation. KCBQ lasted just long enough for scores of those same owners to swarm into the '70s oldies format and destroy it. But some of the broader-based Jammin' Oldies stations of the late '90s sound suspiciously like what Robbin must have had in mind, particularly WMGE (Mega 103.5) Miami and WEJM (Jammin' Gold 95.7) Philadelphia.

As for Jammin' Oldies, there were R&B oldies stations at least as far back as the early '70s and a new generation of AMs that began trying it in the late '80s/early '90s, once the rise of urban AC had eliminated that option for most heritage R&B AMs. R&B oldies still isn't a format that I've heard done to my complete satisfaction anywhere on FM yet—the Chancellor stations are usually too pop for me, the more R&B-flavored ones are too mellow—but you at least have to give credit to some of the folks who were first, including the short-lived CKMR (I94) Detroit, which got there a decade ago, as well as KMEZ New Orleans, the longest-running R&B oldies FM.

Also worth mentioning: WRBO (Soul Classics 103.5) Memphis, for showing that you could still get boxcar numbers with R&B oldies without having to ignore the African-American PIs, and Jerry Clifton's little-heard KMEN Riverside, Calif., for adding in more funk and disco and hitting on what became the Jammin' Oldies formula several years before KISQ San Francisco and KCMG Los Angeles did.

R&B

WQHT (Hot 97) New York deserves all the credit it gets for shaking up the format in 1993, when it repositioned itself as "where hip-hop lives," resulting both in numerous clones and some greatly modified heritage R&B stations. But so does KDAY Los Angeles, which, by the late '80s/early '90s, had become a similar hip-hop showplace and community center. And WOWI Norfolk, Va., the first major R&B FM to find out that you could play hip-hop before 3 p.m. without scaring off all the adults.

When the first "churban" stations came along in the mid- to late '80s, a lot of their success was based on sounding slicker than their urban competition. By the late '90s, the churban stations were trying to sound more "street" than their rivals, which, by now, were better researched, tighter musically, and often more liner-driven. KKDA-FM (K104) Dallas was the heritage outlet that best updated itself for the "blazing hip-hop and R&B" era without ever sounding like a college station.

Urban AC's watershed station, WVAZ (V103) Chicago, came along in 1988 and remained the template until WRKS New York switched to a more gold-based version of the format in 1994, spurring numerous hip-hop/urban AC duopolies modeled on WRKS/WQHT. Some others that deserve mention are WKXI-FM Jackson, Miss. (first to bring the soft AC presentation of a WLTW to the format); WHUR Washington, D.C. (which updated just enough to maintain its '70s progressive heritage into the next century); WSOL-FM Jacksonville, Fla. (whose "hot urban AC" is quickly becoming the format template now); and KMJQ (Majic 102) Houston, for showing that urban AC didn't have to mean urban oldies.

ROCK

After several years of album rock that didn't really rock, there were already signs of what would become "active rock" as the decade began. KIOZ San Diego; WXTB Tampa, Fla.; and KUFO Portland, Ore., were all stations that refined what had begun with Z-Rock and KNAC Los Angeles: less extreme and more gold-based than the original hard-rock blueprint and ultimately more durable for it. In certain ways, they were also the forerunners for today's "classic rock that really rocks" formats at WNRQ Nashville and so many others.

Active rock tended to get put on hold during modern rock's phenomenal mid-'90s growth period, but KQLZ L.A.'s post-Pirate Radio hard rock format and WAXQ New York's modern/active hybrid would both prove themselves forerunners of today's "Extreme Radio" outlets like KXTE Las Vegas. (A lot of hard-rock fans also regard suburban New York's WRGX as similarly

ahead of its time.)

Some of the key modern rock stations tended to make stealth entrances to the format in the early '90s, segueing in from top 40 and not declaring themselves modern stations until several years later (or ever, in the case of WHTZ [Z100] New York). Having polled the industry recently, it's both WNNX (99X) Atlanta, which managed to walk the line between cutting-edge and mass-appeal for years, and KROQ Los Angeles, which successfully reinvented itself in the mid-'90s by rocking harder, that are top of mind for most programmers. To that, I'd add two less-cited faves: KNRJ Houston during its short-lived alternative/top 40 hybrid in 1990 and KWOJ Sacramento, Calif., which made the same top 40-to-modern transition and, to my mind, managed to successfully incorporate both modern and top 40 elements better than anybody.

XHRM San Diego and KXPK (the Peak) Denver both saw the generational split between modern's pre- and post-Pearl Jam listeners coming in the early '90s. If modern AC stations would later wrest the franchise away from "rock alternative" stations like KXPK and XHRM, they still deserve credit for finding a hole. So does WMMO Orlando, Fla., which launched during the short-lived rock AC boom of the late '80s/early '90s and showed that triple-A could actually be a mass-appeal format, even if it wasn't in a grandfathered market like Denver or Portland, Or.

SPANISH

Spanish radio made the same great leap forward during the mid-'90s that R&B radio had made a decade earlier, gaining access to research, for the first time, as well as better FM signals. KXTN San Antonio, Texas' Tejano format showed what Spanish radio could do on FM and was later seconded by the phenomenal rise of the banda format at KLAX Los Angeles, which surprised everybody, except for those of us who'd already seen the regional Mexican format earn a 4 share on AM at KWKW.

KLAX's sister station, WSKQ-FM (Mega 97.9) New York, had similar success by putting salsa on FM for the first time. And while the simultaneous success of KLAX and WSKQ tended to suggest that there was much more demand for youth formats than for the broad-based AC that had previously defined Spanish radio, KLVE Los Angeles showed there was a demand for that, too, when it was researched properly.

TOP 40

It was a standard-bearer for top 40 in the mid-'80s, and WHTZ (Z100) New York became one on several subsequent occasions during the '90s. Certainly, Z100's late-'90s resurgence under PD Tom Poleman had a lot to do with luring other stations back to top 40, but I'm also fond of its 1992-93 period, when PD Steve

Kingston had started filtering in the modern rock records but was still playing all the R&B and dance hits (which would start to disappear in 1994-96). At that point, Z100 came closer to pulling off a true 12-24 MTV-like top 40 format than any other station of the decade.

Bill Thorman's KHOM (Mix 104) New Orleans also rates a mention here. In 1995, when top 40 was exiled to class-A's and suburban frequencies in many markets, KHOM was one of the few rimshotters that became a serious player. More important, it was also one of the first places where you could hear country and R&B crossovers on the same radio station, during an era when many people weren't convinced that listeners would ever demand variety again.

Also deserving mention: KHKS Dallas, one of the first major-market stations to switch into top 40 when everybody else was getting out and which provided the fast-on-rhythm, slow-on-rock template for many other mainstream top 40s during the decade; WFLZ Tampa, Fla., which added modern rock crossovers in the mid-'90s but didn't drop the rhythmic product, proving that rock and rhythm could work in the same format; WFBC-FM Greenville, S.C., and WMGI Terre Haute, Ind., for showing that there was still a demand in the heartland; KXXM San Antonio, Texas, for showing that there was still a demand for a pop-based top 40 in a Hispanic market; and WKTU New York, for showing that there was still a need for dance music in New York, which should have gone without saying in 1996 but did not.

THE INTERNET

Finally, a lot of the '90s stations that may prove to be key in the next decade may not be visible as such now. They're the Internet-only stations that are starting to break through with listeners in the way that cable radio never did (and in the way that most PDs hope satellite radio doesn't). We're still nowhere near knowing the full impact of Internet and satellite radio, but even anecdotally, Internet radio has garnered enough listening to prove that some listeners want something other than what their local outlets are offering.

Right now, it's just guesswork as to who'll emerge as the key stations in the Webcasting revolution. Some conventional outlets like WOXY Cincinnati—which was too eclectic to garner many listeners on a local level but made sense as a national brand—will probably be in there. So will KFMB-FM's '80s channel (the first Internet extension station); the return of KNAC via Webcast, which, significantly, was reported in some trades as if it was just another radio station; and VH1 at Work (one of the first national brands to take aim at radio listening).

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Do you agree with my predictions?

by Tom Taylor

Tom Taylor is the News Editor of the M Street Daily and M Street Journal publications, and can be reached at (609) 883-3321 or by email: MStreetTom@aol.com

We at M Street not only monitor the day-to-day stuff in radio (changes in format, management, facilities, station sales and the rest). We also engage in a little whisker-pulling and trend-spotting regarding what George Bush (the elder) called “the vision thing.” See what you think of these predictions (and they’re strictly mine, not those of M Street) —

- Better jobs, more stable jobs. General Managers have the wider horizon of becoming a market manager or regional executive. Sales execs can aspire to becoming Director of Sales (a headache-producing, line-of-fire job that should pay well). Talented program Directors are assuming more responsibilities as multi-station operations directors. These aren’t easy jobs. But they offer growth opportunities that even the most progressive radio group of five years ago couldn’t hope to match. And thanks to stock options in today’s public companies, managers have additional carrots to offer employees.
 - Continued erosion in Time Spent Listening — but nobody will care (for a while). After all — network TV audiences are shrinking, and yet advertising rates go up, right? Same for newspapers, right? Clients and agencies will continue to line up to tap into radio’s ability to home in on hard-to-find target demographics, right? Well — not if their spot is going to be the ninth commercial in an 11-unit spot set. And not if radio stations and ad agencies continue cranking out sometimes-mediocre spots that don’t motivate shoppers to buy.
 - A crisis in engineering. A group head pulled me aside at the NAB Radio Show and said he’s seriously worried about where tomorrow’s engineers are going to come from. Young people who would’ve chosen broadcasting ten years ago are being seduced by the Internet. After all: radio looks pretty low-tech. (So does TV, by the way.) But who’s been apprenticing long enough to learn to fix those transmitter problems at 7:45am in morning drive?
 - Difficulty finding and retaining salespeople and sales managers. The rap on radio account execs has always been that there’s high turnover back in the sales bullpen, and that radio AEs get less training than sellers in other mediums. Entry-level sellers are hungry for training — but too often they’re given a book to read and one week on the road shadowing one of the heavy-hitters, and then it’s sink or swim. That won’t cut it any more.
 - Indecisiveness about radio’s role vis-a-vis the Internet. And that’s really scary, because radio could become less and less relevant to today’s culture, and fast. A 7-year-old friend of mine already knows more about her computer than her radio.
 - Great opportunity to “brand” radio stations and make them invaluable. But the window of opportunity is closing fast.
 - Huge growth in the Internet side of the radio operation. Enough to generate competition for resources, and enough to even generate some friction and jealousy.
 - Great rewards to those who really do community service, and make themselves invaluable to the community. If you’re just a jukebox, your listeners will drift: There are plenty of Internet entrepreneurs building a better jukebox.
- Times are good for radio — very good. Let’s hope we don’t strangle the golden goose.

huge decrease.* Villains? Higher spot loads (maybe 20+ units an hour), more canned programming and lack of programming innovation. Solutions? Jim Duncan prescribes a commitment to

invest in Bolt, Inc. that includes Timer Warner, Comcast Interactive, AOL and Ford. Bolt will develop and run new community services for the AOL Time Warner Channel

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Page 1 of 4

Final bids are due Friday on Clear Channel-AMFM Inc. spinoffs. It's all been handled very quietly, with little paperwork -- just phone calls from Covington-based Jerry Kersting. They're not even calling it "Round One" (initial bids, due November 5) or "Round Two" (the bids due December 10). From what we hear -- Jerry Kersting at Clear Channel should be back on the phone starting early next week.

Handicapping the spinoffs: Mel Karmazin may be in line for 30 or more stations. As one observer points out:

Page One:

Headlines of the day...

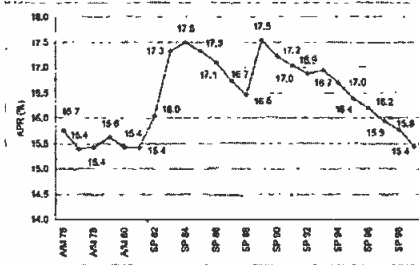
- ▶ Radio in Cincinnati? Seems like it got aced out of Los Angeles, at least in the big urban there. (See the next item.)
- ▶ Emmis. It's so motivated to buy "The Beat" in L.A. that it's willing to buy the intellectual property and accept a lesser technical facility. Emmis exec Rick Cummings tells the L.A. Times "Our original bid was for 92.3, but then they notified us by fax that it was the 100.3 frequency and the Beat's format. That was a change, but we bid on that now."
- ▶ Bob Neil's Cox Radio. Cox also has deep pockets and a strong ambition to grow.
- ▶ Hispanic Broadcasting. It's hungry for more properties and it's got solid financial credentials and a surging stock.
- ▶ Don't forget less headline-grabbing names like Salem. We still think Salem winds up with KSKY, Dallas, for example.

In Boston, Radio One debuts "Hot 97.7 --

Boston's new home on Tuesday morning launch where Radio One would ever African-American answer is: Young. It mirrors some of the pre-dance WJMN. But the announcer on the Hot 97.7 promos we heard was clearly appealing to African-Americans. The calls are WBOT -- which fits "Hot", a name Radio One uses in Atlanta. Station is south-suburban WBOT, Brockton, MA (97.7 MHz).

Major warning signs for radio. Yesterday we told you analyst Jim's Duncan's twin worries: "The way we treat our advertisers and the fact that an increasing number of our listeners are going away." Do you doubt they're going away? Here's a just-released 23-year Duncan's American Radio chart of mean APR (average percentage of the 12+ population using radio in any quarter hour, 6am to midnight).

The entire decade of the 1990s hasn't been pretty --



17.5 to 15.4 equals a 12% decline. At Monday's PaineWebber confab Duncan called it "historically a

to Network hooks up... The relationship agreement to do station (February 3) an advertising

might for trading... going to price in the range... issue totals about 5.4

Page Two:

Headlines continued plus Format changes...

Day the Clear... el-... ealed. It w... on

dates... est D... Crawford... ds station named

(2) drops its mixture of... hristian to do standards... up owner Crawford has... rds outlets in Denver... GS).
country --
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Puerto Rico (#13)

Station	Su	A/S/O	Format	Owner/LMA
WPRM-F	13.5	12.9	tropical	Arso
WKQA-F	7.4	6.6	Spanish CHR	El Mundo
WZMT	5.5	6.1	tropical	AMFM
WIAE-F	5.6	6.0	Spanish AC	Beslow
WMEG	4.9	5.1	Spanish CHR	SBS
WCOM	5.1	4.9	Spanish CHR	AMFM
WKAQ	5.1	4.5	Spanish n/r	El Mundo
WFD	4.1	4.2	romantica	Arso
WIOA	3.5	3.5	romantica	AMFM
WCMIA	3.4	3.9	Span hot AC	SBS
WYXX	3.0	2.7	Spanish CHR	Radio Cadena
WORO	2.5	2.6	Spanish ez	Catholic Ch.
WZAR	2.0	2.0	tropical	Ponce
WVJP-F	2.0	1.9	romantica	Borinquen
WCMN-F	1.8	1.7	Spanish CHR	Caribbean
WAPA	1.4	1.7	Spanish n/r	Wilfredo

New Orleans (continued)

Station	Su	A/S/O	Format	Owner/LMA
WYLD	3.9	3.6	black gospel	Clear Chan
WZOB	3.8	3.6	CHR	Sinclair
WBYU	2.0	1.8	standards	Centennial
WCKW-F	1.3	1.1	classic hits	222 Corp.
WBOK	1.1	1.1	black gospel	Willis
WDOT	1.0	1.0	blues	Clear Chan

Birmingham (continued)

Station	Su	A/S/O	Format	Owner/LMA
WRAX	6.0	4.9	modern rock	Dick
WDDL	5.1	4.9	oldies	Cox
WQEN	4.7	4.9	CHR	AMFM
WZZR	5.1	4.8	classic rock	Dick
WRLR	3.0	4.4	rock	Cox
WAGG	3.7	3.6	black gospel	Cox
WDXB	2.4	2.5	country	AMFM
WATV	2.3	2.4	R&B oldies	Birm. Ebony
WJOX	2.0	2.2	sports	Dick
WJCF	2.0	2.1	c. Christ's. gos.	Crawford
WRRS	1.6	1.9	c. Christian	Realty Group
WAPI	1.6	1.6	talk	Dick
WWSA	1.1	1.4	EZ	NCA
WEZN	1.4	1.2	standards	Cox
WTUG	1.1	1.1	urban AC	Pearce
WJLD	0.8	1.0	urban AC	Richardson
WENN	0.8	1.0	R&B oldies	AMFM

*WQEN now simulcasts on WQEM
**WDXB flipped calls from WJOWX in October.

Austin, TX (#49)

Station	Su	A/S/O	Format	Owner/LMA
KASE	8.3	8.3	country	AMFM
KGBT	8.1	8.0	country	Infinity
KAMX	5.6	5.8	modern AC	Infinity
KLBJ	5.8	5.7	talk	Radio Austin
KKMJ	5.0	5.5	AC	Infinity
KHFI	5.0	5.3	CHR	Clear Chan
KLBJ-F	5.4	4.9	rock	Radio Austin
KVET-F	5.0	4.7	country	AMFM
KFMK	3.7	4.0	rhythmic old.	AMFM
KROX-F	4.2	3.8	modern rock	Radio Austin
KGSR	4.6	3.6	adult altern.	Radio Austin
KEYI	3.2	3.5	oldies	Clear Chan
KPEZ	3.4	3.2	classic rock	Clear Chan
KJFK	1.5	2.4	talk	Shamrock
KLNC	1.9	2.0	country	Radio Austin
KVET	1.7	1.8	sports	AMFM
KELG	1.1	1.5	reg. Mexican	Elgin
KRLS	1.3	1.4	tejano	Elgin
KQCA	1.1	1.3	reg. Mexican	Yellow Rose
KJCE	1.1	1.2	urban AC	Infinity
KQQQ	0.5	1.0	Spanish AC	Yellow Rose

*Radio Austin is a partnership of Sinclair Communications and LBJ Broadcasting.

Richmond, VA (#57)

Station	Su	A/S/O	Format	Owner/LMA
WCDX	9.3	10.4	urban	Radio One
WTVR-F	8.8	8.5	soft AC	Clear Chan
WRVA	8.4	8.1	CHR	Clear Chan
WRVA	7.9	8.1	news/talk	Clear Chan
WMBX	6.4	6.4	hot AC	AMFM
VKJS	6.2	6.1	urban AC	Radio One
WKHK	5.8	5.6	country	AMFM
WRCL	5.2	5.2	oldies	AMFM
WKLR	4.4	5.0	classic rock	AMFM
WRXL	5.2	4.5	rock	Clear Chan
WPLZ	4.6	3.8	R&B oldies	Radio One
WJRY	5.1	3.5	country	Radio One
WBFF-F	2.7	3.0	rhythmic old.	MainQuad
WTVR	1.5	1.5	standards	Clear Chan
WGCV	0.9	1.3	black gospel	Hoffman
WXGI	1.2	1.2	country	Cox
WREJ	0.9	1.1	black gospel	4M Tidewater
WRNL	1.2	1.0	sports	Clear Chan

*Simulcasts: WJRW/WARV

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New Orleans, LA (#41)

Station	Su	A/S/O	Format	Owner/LMA
VIQUE	15.0	13.9	urban	Clear Chan
WYLD-F	8.9	9.7	urban AC	Clear Chan
WVL	7.8	8.2	news/talk/rock	Sinclair
WNDE	6.4	6.7	country	Clear Chan
KMEZ	6.3	6.5	R&B oldies	Centennial
WTXL	5.6	6.0	oldies	Sinclair
WLMG	5.1	5.1	soft AC	Sinclair
KRND	4.7	4.7	modern rock	Clear Chan
KUMX	4.2	4.2	CHR	Clear Chan
WLTS	3.9	3.9	AC	Sinclair
WRND	3.8	3.7	classic rock	Centennial

Birmingham, AL (#55)

Station	Su	A/S/O	Format	Owner/LMA
WZZK	10.1	8.8	country	Cox
WBHK	7.9	7.9	urban AC	Cox
WBHJ	7.5	7.5	urban	Cox
WMJJ	5.2	5.9	AC	AMFM
WYSF	6.1	5.6	soft AC	Dick
WERC	5.8	5.2	talk	AMFM

The M Street
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Broadcast Stocks Today's M Street Radio Stock Index =115.39 ▼ 0.57 (-0.5%)

Dow close 11105.65 ▼ 118.36 Nasdaq 3586.82 ▲ 40.81 S&P 500 1408.90 ▼ 14.43

Close	Change	Vol(00)	Emmis	93.250	▲ 1.109	3205	Regent	11,000	▼ -0.250	39	
AMFM	74.000	▼ 0.938	7557	Entercom	62.125	▲ 2.312	1531	Saga	24,000	▲ 0.188	407
Big City	4.625	▲ 0.125	10	Fisher	62.000	▲ 3.750	55	Salem	18,500	▲ 1.875	3038
Citadel	49.125	▼ -0.688	714	Hispanic	81.125	▲ 1.125	4004	SBS	34,000	▼ -0.500	3906
Clear Chan	84.375	▼ -1.125	9659	Infinity	39.375	▼ -0.188	5407	Sinclair	11,875	▲ 0.500	7867
Cox Radio	78.688	▲ 2.875	102	Jeff-Philo	67.938	▼ -0.188	1853	Sirius	25,750	▼ -0.312	3336
Cumulus	42.562	▼ -0.750	4446	Radio One	81.875	▲ 8.625	1656	Westwood	59,688	▼ -1.312	1802
Disney/ABC	27.688	▼ -0.125	80319	Rad. Unica	25.125	▼ -1.375	1767	XM Satellite	25,375	▼ -1.375	1423

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Editor: Tom Taylor Phone: (609) 883-3321. Fax: (609) 883-5696. E-mail: MStreetTom@aol.com.

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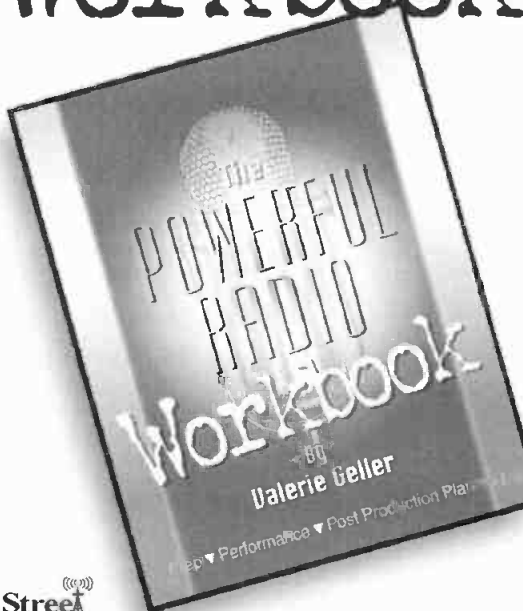
-Frank Raphael, Director Programming & News WCBS-NY

"Now I've got the help I need to develop 'hit talent'"

-David Gleason VP programming Hispanic Broadcasting Corporation

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For Managers, Programmers and Air Talent

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PUBLICATIONS

About the author: Internationally acclaimed broadcast consultant VALERIE GELLER works with stations and broadcast groups throughout the world coaching individual talent and managers, and conducting "Creating Powerful Radio Workshops."

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Program Director Training Manual!

by Valerie Geller

Internationally acclaimed Broadcast Consultant and "Creating Powerful Radio" author Valerie Geller is president of Geller Media International, a programming and management consulting firm for news, talk, information and personality radio. Following is an excerpt from her new book, published by M Street Publications, titled "The Powerful Radio Workbook: The Prep, Performance & Post Production Planning". GELLER MEDIA INTERNATIONAL can be reached at 212-580-3385 or faxed at 212-787-6279. E-mail vgeller@aol.com or visit the World Wide Web location through the Internet at <http://www.gellermedia.com>.

The POWERFUL RADIO AIRCHECK SESSION

"No one can make you feel inferior without your consent."

—Eleanor Roosevelt

"Did you hear the show?" That is a common question heard at radio stations. Most managers don't have the time to actually hear the on-air product. However, the talent is hungry for feedback. Starving, actually. Surprisingly, hosts often hire me at their own expense to conduct aircheck sessions with them, craving direction that their program directors cannot or do not have time to give.

Airchecking is more than just a "tape critique." One-on-one coaching, or airchecking, is a specific, focused way of working. It is not the only tool that can be used to develop, improve, and advance talent, but it is the best way. Airchecking is the process of listening to tape of a show and, using specific criteria, determining what worked and what did not work. With a guide, airchecker, coach, or PD as your witness, one then decides what can be improved.

Even if you listen to tape of your shows religiously, you are likely to miss many nuances of the total performance. One air talent I work with says, "When I listen alone, I focus on how I did. I get critical of just me, not how the whole show went. When I listen with other people in the room, I focus on everything that is happening on the air: the guest being interviewed, sound effects, callers, spot breaks, etc. I hear it all."

It can't be helped. Think of your school or family group photos. When you see one, the first thing you do is look at yourself. It is the same in radio. It is a natural thing to pay attention to how you made a certain point or handled a particular caller. You are less likely to be aware of the subtleties of that caller's comments or the newscaster's clever contribution. There is something about listening to your show with a witness in the room that forces you to hear your work differently.

In this workbook, we explore a variety of specific techniques and methods for effective airchecking. Managers will learn to create an environment that makes staff receptive to constructive criticism. The goal is to aircheck in such a way that each talent sets achievable goals to fulfill his or her creative potential.

Talent, if you do not know what you sound like on the air, you are already in the danger zone. You are working with a handicap.

Watch a child play by making faces in a mirror. What do I look like if I'm mad? What do I look like with my tongue out? Can I see myself from the back?

Airchecking is like a mirror. How do I sound when I am sad or angry? How do I behave with a difficult guest? What happens when I try to sound smarter than my partner? Am I smarter than my partner? What happens when I pretend to know something about a topic I know nothing about? What happens when I'm bored on the air? How do I sound if I didn't get enough sleep? What kind of a show will I have if I have not been out of my house in a month except to go to work?

Your audience knows, but without your aircheck tape as a mirror, you do not. Sitting alone with a tape of your show is like a single mirror. Working with a talented aircheck coach can give you multiple reflections of your work. There are other angles you cannot see with only one frame of reference. Viewing those other angles is the power of a good aircheck session.

WHAT IS AN AIRCHECK?

Think of the show as a garden and airchecking the show as a weeding process. In order to maintain its health, growth, and beauty, you should regularly walk through your garden taking note of which plants are thriving and which need attention. Some parts of the garden flourish, some struggle to survive. Always you appreciate its beauty. If there is a special new plant in your garden, you want to learn its potential and create the right environment for it to grow. You make sure it has the right sun, soil, etc. Your aircheck is like that walk to see how well your garden is coming along.

-continued next page -

HOW DOES ONE LEARN TO AIRCHECK?

Unfortunately, there is no airchecking school for programmers. One learns by working with people, seeing what is effective and what is not. Some aspects of airchecking will vary greatly, depending upon the individuals involved. It is in the best interest of programmers and managers to learn to aircheck effectively, simply because if the talent wins the station wins. There are a few things one must never do, but the only right way to aircheck is the way that works.

In the United States where it is becoming easier and less expensive to take a syndicated network show than to have local live talent on the air, it is critical that we develop new talent now. Most syndicated programs were once local success stories. Someone worked with each of those hosts when they were starting out.

Even the strongest syndicated shows can be beaten by hot local talent. I frequently meet novice broadcasters with much to offer. What will stations do once today's syndicated shows run dry or move to television? We need to look to the future. Airchecking and developing these talented people is one way to ensure that creative and powerful radio will continue into the next generation. Of course, after a few years of experience, some of these very people will go on to become major syndicated talent.

TALENT DOES NOT COME WITH "CARE AND FEEDING" INSTRUCTIONS

Without an understanding of what is required for an individual air talent to succeed, even the most gifted new hire may not reach his or her potential. In a case like that, it takes a year or two for the talent to leave or be asked to move on. What went wrong?

Let's use the garden analogy. You came home from the garden center with some big, fancy bulbs. The picture on the box showed a huge, exotic flower, but, unfortunately, the box was without instructions. How much water is needed? How much sun?

There may be nothing wrong with the talent you have chosen, but when you have to play a guessing game with insufficient information there is a good chance of damaging the talent, or at least failing to create an environment where talent, like that fancy flower, can blossom.

If you found something you did not recognize in your garden, you would not cut it back without knowing what it was—it could be something wonderful. The same goes for air talent. Veteran

airchecker Dan Vallie, with Vallie-Richards consulting puts it well when he advises programmers to "let talent go out on a limb as far as they can. Do not restrict them until you find their range of potentials and limitations. It's better to reel them in after a while than to have to keep pushing them out there."

A great aircheck session with a trained program director can move talent along faster than any other tool. Progress may be painstakingly slow. Talent improves step by step, day by day. Frustratingly, the process may sometimes seem to be working in reverse. There is a period of intense growth, followed by what sound like patches of mediocrity, where all coaching seems to have been in vain. What you may really be hearing is the talent searching for ways to implement suggestions and ideas you have discussed. Have faith and continue the process. If you are on the right path, positive change will come.

When done correctly, airchecking can be a solution to the dilemma facing managers and programmers around the world who complain: "I can't find any good talent. I've listened to dozens of tapes and they are all bad or mediocre," or "This is a good station in a reasonably sized market, and the job pays a decent salary. Why can't we find the right people?" The answer is DEVELOP THEM. Here is the Aircheck Method we use:

GELLER MEDIA INTERNATIONAL'S BASIC AIRCHECK RULES

1) Always have a tape of the show you are discussing on hand. You may wish to transcribe it word for word to emphasize specifics. Keep in mind that a transcript can destroy context, i.e., sarcasm, irony, humor all get left behind with the loss of vocal inflection. This often happens when a manager receives a nasty call or complaint letter with specific quotes included. Inevitably the context is missing. A discussion can degenerate quickly if the actual facts of the case are in dispute. Having the tape allows you not only to look at the content, but also the context of an event on the show.

2) Focus on one thing at a time. Sometimes an aircheck session turns into a "dump" session, in which talent unburdens him- or herself of a lot of thoughts having nothing to do with the show. A double standard applies here. It's acceptable, to a point, for the host to digress. After all, a PD is uniquely able to understand pressures talent may be under, and even, in some cases, to do something to alleviate them. As a manager, however, you are there to aircheck, not to vent. Listen to the

talent. Should you hear the makings of a great show taking place in your office, encourage the talent to put that on the air. Caution: don't let these diversions distract you from the aircheck session; just move the subject back to the tape and the show at the most appropriate moment.

3) Tell the truth. Trained communicators sense when you are fibbing.

4) Reinforce the positive by starting with the good stuff. Remember to acknowledge goals achieved.

5) Be fair. Criticism goes in very deep. No matter how angry you are, avoid verbalizing your negative reactions to a piece until you can express yourself calmly and rationally.

6) Let the talent discover along with you what needs to be improved.

7) Outline strengths. Ask a lot of questions. What worked? Why did you want to do this on the radio? What were you trying to say here? Did this connect? Did this make you laugh?

8) Have faith. Believe in your talent's ability to improve.

9) Always end an aircheck session with one or two mutually agreed upon "Achievable Goals." Pick at least one thing that can easily be accomplished by the next scheduled session. Try to let the talent initiate goal-setting.

10) Is there anything on the tape that you could use as a promo?

EXCERPTED FROM THE POWERFUL RADIO WORKBOOK

BY VALERIE GELLER

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And then there were two: Last Year's Final Five are next year's Top Two

by Tony Sanders

Tony Sanders is a Senior Analyst for Duncan's American Radio and can be reached at 202-362-3819 or tsanders@duncanradio.com.

Heading into year five of the mega-merging of the radio industry, we decided to update our tally of radio's top-billing groups and to take a look at how these groups got that way. A lot has happened in the last 12 months.

It took less than a year for five of radio's top-billing groups to merge and emerge as just two separate companies. The just-announced \$23.5 Billion Clear Channel/AMFM merger will unite radio's former #1 (AMFM Inc.) and #3 (Clear Channel/Jacor) billing groups. CBS/Infinity continues to rank as the #2 biller, according to Duncan's American Radio's latest tally, but ABC has moved up to be biller #3 by virtue of the AMFM merger. Entercom has become the country's fourth-highest biller, largely through its purchase of the bulk of Sinclair Broadcast Group's radio division. That purchase added about \$118 Million in yearly revenue to the Entercom's top line. (See the table, below.) Viacom's merger with CBS/Infinity doesn't change the latter's ranking as radio's #2 biller.

Cox Radio remains the fifth-largest biller, but the ranks of the next five groups have changed considerably. Emmis, Cumulus and Citadel have all moved higher in the revenue rankings because of their dealmaking. Cumulus has shown the most dramatic growth through acquisition, rising from 9th to 6th largest biller in less than a year. The just-announced \$242 Million purchase of Connoisseur (ranked #26 by Duncan's) adds \$39.1 M in revenue. Another \$44.57 M in Cumulus revenue comes from a number of smaller-market group deals and acquisitions. All told, Cumulus' total revenue amounts to nearly \$248 M annually.

Citadel has jumped from 10th to 7th. The group's new yearly billing figures include revenue from the following groups and markets: \$10.35 M from Fuller-Jeffrey in Portland and Portsmouth, \$24.165 M from the five-group acquisition of Broadcasting Partners and \$7.95 M from the purchase of Caribou's Oklahoma City combine. Another \$8.21 M in revenue is included from various other acquisitions.

Emmis Communications acquired Sinclair's St. Louis operations this year, a move that adds about \$26.3 M in annual revenue and that helps Emmis maintain its position as the 8th largest radio group.

Group owners Hispanic Broadcasting (#9) and Susquehanna Radio (#10) have not made any significant purchases this year that would push them higher in the rankings. It's interesting to note that a bit less than \$5 M in revenue currently separates Hispanic and Emmis in the rankings.

This table re-ranks the 10 largest radio groups by taking into account recently-announced acquisitions through Nov. 29, 1999. All revenue figures are pro forma and based on full-year 1998 billing estimates by Duncan's American Radio.

Rank	Group Owner	Revenue 1998
1	Clear Channel/AMFM	\$3,071,500,000
2	CBS/Infinity	1,775,400,000
3	ABC	340,500,000
4	Entercom	313,850,000
5	Cox	311,320,000
6	Cumulus	247,770,000
7	Citadel	213,975,000
8	Emmis	191,490,000
9	Hispanic Broadcasting	186,730,000
10	Susquehanna	163,200,000

On its surface, the Clear Channel/AMFM merger blends two of the industry's top-billing groups. But a quick survey of station-trading history shows that Clear Channel/AMFM was built, primarily, through the consolidation of 74 other radio groups. That's the largest collection of group deals ever assembled in the radio business: 47 different radio groups assembled by AMFM's own acquisitions with 27 groups Clear Channel

-continued next page -

has bought or acquired through its own series of mergers. In fact, the top-10 group owners were built from the agglomeration of over 160 different radio groups, networks and rep firms. And that tally doesn't include the dozens of other radio-station purchases these groups have been making along the way.

Aside from many, if not most, of radio's record-breaking station deals, CBS/Infinity is the product of 20 different group acquisitions. ABC Radio, on the other hand is really the blending of just three group deals: Capital Cities, ABC and the Walt Disney Company. Part of that dealmaking also includes ABC's \$50 Million purchase of Satellite Music Network, a network in which ABC had previously held a 14% interest.

Entercom is also the amalgamation of three separate groups: Entercom, Sinclair Broadcast Group and Heritage Media.

It's not until we reach Cumulus Media that we find a group that comprises a large number of formerly individual groups. According to Duncan's American Radio, 33 separate groups have been acquired in whole by Cumulus.

Citadel is the product of 16 different groups while Emmis is the product of five different groups. Hispanic Broadcasting (formerly Heftel) is the result of four different groups merging. The only one of the top-10 to have grown without making whole-group acquisitions is Susquehanna Radio. Founded in 1941 by putting WSBA-AM York on the air, the company now owns 23 stations, along with one other station which is operated by another firm via an LMA.

1999 FCC Overview

by
Gregg P. Skall
Howard J. Barr
Peter Gutmann

Gregg Skall, Howard J. Barr and Peter Gutman are communications lawyers with the firm of Pepper & Corazzini, L.L.P., in Washington, DC. They frequently represent parties before the Commission and the Congress to obtain desired policy objectives. In 1984, the National Journal recognized Gregg as one of the leading radio spectrum lobbyists in Washington. He writes and speaks on topics of Federal Communications Commission administrative process, electronic mass media, and telecommunications. They may be reached at (202) 296-0600 or www.commlaw.com.

This section provides an overview of the most important regulatory developments affecting radio broadcasting coming from the Federal Communications Commission since publication of the 8th Edition of the **M Street Radio Directory**. Prior developments have been incorporated into the Section entitled **FCC Procedures**, also found in this edition.

Low Power FM Service Proposed

Immediately prior to the deadline for this edition, the FCC adopted an order establishing its proposed Low Power FM Radio Service (LPFM). The actual order was not released at this writing. This summary is, therefore, only a preliminary summary of the new LPFM service. Further details will be available once the FCC releases the text of its order. It should be noted, that the National Association of Broadcasters, for one, has promised to challenge the new rules in court. There are also Congressional initiatives to bar implementation. Please refer to our web site for further developments. (www.commlaw.com)

The new service is to be non-commercial and is intended to foster opportunities for local organizations to provide programming targeted to the needs and interests of relatively small areas. Three of the Commissioners strongly support the proposal, and believe that they have successfully balanced a need to increase citizen access to the airwaves against the need to protect broadcasters' existing service.

- **Classes of Service** The Commission will recognize two classes of LPFM service. LP 100 stations with 50 to 100 watts of power from a height above average terrain of no more than 30 meters, yielding a predicted service radius of approximately 3.5 miles. LP 10 stations will operate with one to ten watts from a height above average terrain of 30 meters, with a service radius of approximately one to two miles. The commission rejected an original proposal for an additional class of 1,000-watt facilities, which would have provided service within a ten-mile radius.

- **Interference Protection** Through separation requirements, LPFM stations will be required to protect all existing FM facilities (including translators and boosters). They will also be required to protect the city grade contours of all subsequently authorized (new or modified) FM facilities. Third adjacent channel protection will not apply. The Commission believes that this relaxation of traditional protection would not impair existing FM service or impede a transition to digital service. An additional 20 kilometer buffer for co-channel and first adjacent channel spacing must be observed between LPFM stations and full power stations.
- **Eligibility** Eligible entities will include non-commercial private or governmental organizations with educational purposes or which provide local public safety or transportation services. To maximize diversity, no current broadcaster or party having an attributable interest in media subject to the Commission's multiple ownership rules will be eligible for an LPFM station or can have a programming or operating arrangement with an LPFM station. There will be both local and national ownership limits. For the first two years following implementation of the LPFM service, only local entities (to be defined as being physically located, or having 75% of its board members residing, within 10 miles of the station) will be eligible to hold licenses; after that, an entity can have an attributable interest in only one station per community. In addition, for the first two years no entity may have an attributable interest in more than a single license; after two years the limit will rise to five licenses nationally; and after three years it will rise to ten. All pirate broadcasters are to be disqualified, unless they ceased unauthorized operations by February 26, 1999 or within 24 hours following notice from the Commission.

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- **Application Procedures** The Commission staff presently anticipates three application windows. The first would accept only LP100 applications and would open for a five-day window following at least 30 days' notice. The window is tentatively scheduled for late May 2000, and electronic or paper filings would be permitted. The Commission hopes to authorize non-mutually exclusive applications by summer 2000, after public notice and an opportunity for petitions to deny. Mutually exclusive applications would be resolved by a point system weighted to favor applicants most likely to serve local needs – one point would be awarded to applicants having an established community presence of at least two years; another point to those who proposed 12 hours of daily service; and a third point to those pledging eight hours of local programming. Ties would be broken through time sharing or sequential licensing (by which up to eight applicants would receive successive one-year licenses). A subsequent window would invite the filing of LP10 applications. A final window would allow further LP100 filings, presumably from groups that had not been able to prepare an application in time for the first window.
- **Regulatory Constraints** LPFM licenses may not be transferred to another party. LPFM licensees are to be subject to the rules governing station identification, political programming, the maintenance of political files, sponsorship identification and indecency and obscenity, but would be exempt from the main studio rules, the public inspection file rules, and the need to file ownership reports. LPFM stations would be required to pass, but not encode, Emergency Alert System (EAS) messages. They would be required to operate with a minimum schedule of 36 hours per week. Donor acknowledgment announcements would be permitted along the same lines that now apply to non-commercial educational stations.

New EEO Rules

On the same date it adopted the LPFM order, the Commission also adopted its long awaited new rules for equal opportunity enforcement. Essentially, the rules prohibit discrimination on the basis of race, religion, color, national origin or gender and impose a broad outreach obligation for all qualified job candidates for positions at radio, television and cable companies. The Commission also left the EEO docket open

to facilitate the collection of additional information relevant to employment disparities in the broadcast and cable industries.

The new rules require broadcast licensees to widely disseminate information about job openings to all segments of the community. They do not require broadcasters to hire any particular applicant. The Commission intends to give broadcasters significant flexibility in choosing EEO programs. Broadcasters may implement two supplemental recruitment measures:

- (1) sending job vacancy announcements to recruitment organizations that request them, and
- (2) selecting from a menu of non-vacancy specific outreach approaches, such as job fairs, internships programs, and interaction with educational and community groups.

Alternatively, a broadcaster may design its own outreach program, but must maintain records concerning the recruitment sources, race, ethnicity and gender of applicants and monitor the effectiveness of its outreach efforts.

The Commission will continue to allow religious broadcasters to establish religious belief or affiliation as a job qualification for all station employees. Despite pressure from broadcasters to raise the limit, the Commission retained the exemption from the EEO rules at stations with fewer than five full-time employees. All other broadcasters must place an annual EEO report in their public file detailing their outreach efforts and must file a Statement of Compliance every second, fourth and sixth year of the license term certifying compliance with the EEO rule. In addition, all stations with more than 10 full-time employees must submit their annual EEO reports to the Commission midway through the license term and at renewal for a Commission review of the station's outreach efforts.

The Commission also reinstated the requirement that broadcasters file the form 395 annual employment report. However it stated that the information would not be used in the station renewal process, but solely to monitor industry employment trends and prepare reports to Congress.

Terrestrial Digital Audio Broadcasting

The Commission launched its first formal inquiry into terrestrial digital audio broadcasting ("DAB"). The proceeding marks the Commission's initial attempt to explore the two primary methods of DAB – those that require new spectrum and those that would allow the simultaneous broadcast of analog and digital radio signals in the current AM and FM bands without

disrupting existing analog service (in-band on-channel or "IBOC"). The Commission stated that its overall policy goal is to authorize a DAB service that permits broadcasters and listeners to realize fully the superior technical performance capabilities of this technology while preserving the viability of existing terrestrial broadcasters. The Commission stated that it seeks to promote spectrum efficiency and for that reason would like to favor IBOC, though it recognized that non-IBOC had yielded superior test results thus far.

Program Length Political Ads

The Commission ruled in *People for the American Way and Media Access Project* that broadcasters could be required to sell non-standard lengths of time, such as five minutes, to legally qualified candidates for federal elective office.

In 1979 the FCC, and later the U.S. Court of Appeals, ruled in *Carter/Mondale Presidential Committee, Inc.*, that the Communications Act requires that federal candidates' requests for access must be considered individually, on a case-by-case basis. Under this case precedent, American Way argued that the Commission had consistently required broadcasters to consider each request for time on an individualized, *ad hoc* basis. Given the difficulty of establishing predictable criteria by which to judge a broadcaster's actions, the FCC issued a declaratory ruling in 1994 stating that the statute permits broadcasters to adopt a ban on the sale of non-standard lengths of time. American Way argued that a broadcaster should not be permitted to establish a blanket ban on the sale of any particular length of spot or program time.

Reversing its prior ruling, the Commission held that federal candidates have a right to purchase "reasonable" amounts of time, even in lengths not recently used by the broadcaster or a commercial advertiser. In evaluating complaints, however, the Commission stated that it would continue to rely on the reasonable, good faith judgment of licensees.

The Radio-Television Cross-Ownership Rule - The Commission adopted a new three-part rule which will permit a party to own a television station (or two television stations if permitted under the new duopoly rule) and any of the following radio station combinations in the same market:

- Up to six radio stations (any combination of AM or FM stations, to the extent permitted under the Commission's separate local radio ownership rules) (or one TV station and seven radio stations) in any market where at least 20 independent voices would remain;

- Up to four radio stations (any combination of AM or FM stations, to the extent permitted under the local radio ownership rules) in any market where at least 10 independent voices would remain; or
- One radio station (AM or FM) notwithstanding the number of independent voices in the market.

For purposes of this rule, the Commission will count as "voices" all independently owned, full-power, operational, commercial and non-commercial television stations licensed to a community in the DMA in which the TV station in question is located; all independently owned and operational commercial and non-commercial radio stations licensed to, or with a reportable share in, the radio metro market where the TV station involved is located; independently owned daily newspapers that are published in the DMA and have a circulation exceeding 5% of the DMA households; and a single cable system, if service is generally available in the DMA. With respect to the second criterion, the Commission will generally follow Arbitron's radio markets. In TV DMAs with two or more radio markets, the showing would apply to each. However, the Commission recognizes that nearly half of all commercial radio stations are located outside Arbitron's 268 markets, in which case parties may demonstrate a "functionally equivalent" radio market on the basis of listening statistics in a county or group of contiguous counties or on the basis of contours (2 mV/m for AM or 1 mV/m for FM) that encompass the community of license of the TV station. A "failed station" waiver will be available as with respect to the revised duopoly rule; however, "failing station" and "unbuilt station" waivers will not apply to cross ownership.

The Commission noted that during the long pendency of this proceeding, it has granted a number of radio-television cross-ownership rule waivers conditioned on its outcome. Many involve combinations that are now permitted under the revised rule. Others will be permitted to continue, but conditioned on the outcome of the Commission's next review of the rules, scheduled for 2004. However, beginning in late 2000, a party may request the Commission to conduct an accelerated review of its situation based upon public interest factors, equities, marketplace conditions and the local progress of DTV conversion.

Proof of Performance Simplification

The Commission proposed a significant reduction in proofs of performance and certain other technical requirements for the approximately 2,000 AM radio stations which operate

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directionally during daytime hours, nighttime hours, or both. In the case of full proofs of performance, required after construction or substantial modification, the Commission proposed reductions in the number of radials, the number of points to be measured per radial and the distance over which those measurements are to be taken. In the case of partial proofs, the Commission proposed to reduce the required minimum number of points per radial to be measured and further proposed to eliminate the need for a partial proof following replacement or modification of sampling system components mounted in the exact location of old components on the tower if monitor point measurements remain within specified tolerances before and after installation. The Commission also proposed to simplify a number of its related rules.

Revision of Policies Governing Construction Periods and Applications

The Commission reconsidered its 1998 "Streamlining Order," which generally extended the term of most broadcast construction permits to three years, while limiting the circumstances for extensions. In addition, the Commission modified the criteria for acceptance of partially deficient applications, and for the first time will accept facsimile signatures on all applications.

The result of the Commission's new policy was to extinguish, at the end of their current terms, many construction permits that had been outstanding for more than three years. On reconsideration, the Commission ruled that any construction permit in effect as of February 16, 1999 (the effective date of the Streamlining Order), and whose forfeiture was not final, was to be extended to the latter of the existing expiration date or to October 22, 2000. Where appropriate, the additional time would be further subject to the revised tolling provisions.

In the Streamlining Order, the Commission indicated that it would toll the three-year construction requirement only during the pendency of natural disasters or administrative or judicial review (other than procedures, including zoning, before local governmental bodies). On reconsideration, the Commission decided to expand its tolling provisions to include the failure of a Commission-imposed condition precedent to commencement of operation (for example, when a channel change is premised upon the vacation of that channel by another station and the issuance of a license for operation on that station's new channel). In such cases, the permittee must still complete construction and so notify the Commission prior to expiration of its permit, even though program testing would not yet be possible.

Streamlining of Radio Application Procedures

The Commission modified its rules to streamline the processing of certain broadcast applications. The specific changes are to expand the definition of modifications which will be deemed "minor changes," to process such minor changes on a first come/first served basis, and to permit the simultaneous processing of certain contingent FM applications.

Redefinition of "Minor Changes". The Commission conformed the definition of a "minor change" for AM, non-commercial educational ("NCE") FM and FM translator stations to the current definition in the commercial FM service. A minor change will now include all of the following:

- § Changes of frequency by all stations to first-, second- and third-adjacent channels and by FM translators to intermediate frequencies (i.e.: 53 or 54 channels); however, all frequency changes by expanded-band AM stations will remain major changes.
- § Changes in power, antenna height and/or antenna location (even if such changes for AM and NCE FM stations would result in a change of station class); however, NCE FM and FM translators must continue 1 mV/m service to some portion of their authorized 1 mV/m service areas.
- § Changes in authorized hours of operation (including the addition of nighttime service) by AM stations.

The only types of applications which will still be processed as major changes are a change in an AM or FM station's community of license; any change in frequency other than to a first-, second- or third-adjacent channel (or an FM translator's IF channel); any change in frequency by an expanded band AM station; and any site change in which the existing and proposed 1 mV/m contours of an NCE FM or FM translator station would not overlap.

Processing of Minor Change Applications. The Commission extended first come/first served processing to all applications, which are now deemed to be minor changes. Once a minor change application has been filed, it will be considered mutually exclusive only with conflicting minor changes filed on the same day and will cut off the filing rights of any subsequent mutually-exclusive applicants. Any conflicting applications received after the filing of a first acceptable application will be grouped according to filing date behind the lead application in a queue, their rights to ripen only upon a final determination that the lead applicant (and all those ahead in the queue) are unacceptable.

FM Minor Change Tenderability Criteria

The Commission revised its “two-tier” review system for acceptance of applications for FM minor changes in the non-reserved band (new and major changes are now subject to the Commission’s auction procedures). An application for a minor change will be placed on public notice if it contains all of the following “first-tier” items: the applicant’s name and address, signature, principal community, channel or frequency, class of station and transmitter site coordinates; and if it omits no more than three of the following additional “second-tier” items: (a) a list of the other media interests of the applicant and its principals, (b) certification of compliance with the alien ownership provisions of the Communications Act, (c) tower/antenna heights, (d) effective radiated power, (e) whether the antenna is directional or omni-directional, and (f) an exhibit demonstrating compliance with the contour protection requirements of Section 73.215 of the rules. Applications containing all of the first-tier items and omitting only three or fewer second-tier items will be issued a deficiency letter and provided one opportunity to cure all of the defects; others will be returned.

Amendment of Ownership Attribution Rules

The Commission has amended its mass media attribution rules, which define those interests in or relationships to licensees that are considered tantamount to ownership. The revisions are:

- § An equity/debt plus attribution rule that now attributes certain non-voting stock and debt, while retaining the single majority shareholder exemption.
- § Raised the passive investor voting stock benchmark from 10% to 20%, while retaining the 5% voting stock attribution benchmark.
- § Attributing certain in-market television and radio LMAs.
- § Eliminated the cross-interest policy.
- § No change to treatment of joint sales arrangements as nonattributable.
- § Limited liability companies are now treated in the same manner as limited partnerships.
- § Established transition measures for interests newly made attributable as a result of the rule changes which would otherwise result in immediate violation of the Commission’s multiple ownership rules.

Equity/Debt Plus - While keeping the single majority shareholder exemption, the Commission adopted a new “Equity/Debt Plus” (“EDP”) rule. Under the new EDP rule, interests will be attributed if, aggregating both debt and equity holdings, they exceed 33% of the total asset value of the licensee or a controlling

entity and the investor is either a “major program supplier” or a same-market media entity subject to the broadcast multiple ownership rules.

“Total assets” refers to the sum of all debt plus all equity. Debt includes all liabilities, whether short-term or long-term. Equity includes all stock, whether common or preferred, and whether voting or nonvoting, together with all partnership interests, including interests held by insulated limited partners. Once an interest is attributable under EDP, such attribution would apply to determine compliance with all national and local ownership rules. All nonvoting stock, debt and other non-voting instruments (that is, interests such as warrants, convertible debentures and options with rights of conversion to voting interests, which will be attributed only when conversion is effected) will continue to be considered nonattributable. Similarly, limited partnership interests and interests in LLC’s will be nonattributable upon certification that the Commission’s published insulation standards have been met.

Stockholding benchmarks.

The Commission retained its current active voting stock benchmark at 5%. As for passive investors, the benchmark was increased from 10% to 20% in order to afford broadcasters increased access to investment capital. It continued adherence to its definition of passive investors subject to the 20% benchmark to include only bank trust departments, insurance companies and mutual funds, as they are subject to fiduciary restrictions which tend to limit the amount of pressure they can exert upon licensees and their broadcast facilities. The Commission indicated that it would consider further relaxation in the future, based upon its forthcoming experience with the 20% benchmark.

Time Brokerage Agreements - The Commission declined to adopt specific programming responsibility safeguards, preferring to re-emphasize that its rules require all licensees to maintain control over station management and programming, regardless of any time brokerage agreement that may be in effect.

Cross-Interest Policy - The Commission eliminated its cross-interest policy as having been vague and applied in an uncertain *ad hoc* manner. Instead, it will rely upon its EDP and other bright-line tests to define interests that will be prohibited, whereas all others would be permitted. The policy precluded individuals or entities holding an attributable interest in one media property from holding a nonattributable but meaningful interest in another medium serving the same area. Administered

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on a case-by-case basis, it focused upon key employees (other than consultants), joint ventures, nonattributable equity and consulting positions.

Joint Sales Agreements – The Commission declined to attribute agreements for the joint sale of broadcast commercial time by licensees (both radio and television) in the same market. Joint Sales agreements are contracts that affect primarily the sales of advertising time, but not programming, personnel, physical facilities and other core aspects of station operations.

Limited Liability Companies and other Hybrid Forms - Limited liability companies and other new business forms, including registered limited liability partnerships, will be treated under the same attribution rules that currently apply to limited partnerships. That is, the owners of such entities will be treated as attributable unless the owner can certify their lack of direct or indirect involvement in the management and operations of the media-directed activities of the entity based upon the Commission's established insulation criteria.

Transition Issues - Concerned that its actions not disrupt existing financial arrangements, the Commission concluded that only interests acquired on or after November 5, 1996 (the date of adoption of one of the inquiries in this proceeding) should be subject to its new rules. Interests acquired prior to that date which would result in violations of the multiple ownership rules are to be permanently grandfathered for so long as the interest is not transferred or renewed. Thus, an EDP interest that violates the new rules could not be renewed beyond its current term of this relevant Agreement. Non-grandfathered interests that are now attributable, together with grandfathered interests that are to be assigned, will have twelve months to be divested or otherwise achieve compliance with the new rules.

Further Revision of Local Public Inspection File Rules

Telephone Requests for Public File Information - The Commission had previously authorized the relocation of the public file to a station's main studio, even if outside the community of license. Because of the potential distance between the file and the community, the Commission required that all stations honor telephone requests for copies of file material. The rule has now been modified to require that telephone requests be honored only by stations whose public file is located outside the city limits of their community of license. Additionally, documents requested by phone need only be mailed within a station's geographic service area.

Political Files –The Commission had suspended the telephone information and mailing procedure with respect to political file materials until the end of the 1998 election season, out of fear that constant telephone requests during a campaign would be burdensome and disruptive to licensees. The Commission has now permanently exempted the political file from its new rule. Thus, candidates or their representatives (as well as members of the public) seeking to review a station's political file may be required to do so in person.

Personal E-mail. The Commission's 1998 revision required licensees to retain and make available to the public most written comments and suggestions regarding station operation, including those received as electronic communications. The Commission has now limited the e-mail retention and access requirement to apply only to e-mail sent to a publicly advertised e-mail address or to station management, and specifically excludes personal e-mail messages received by staff members.

Broadcast Auctions

The Commission held its first closed broadcast auction, resulting in 91 winning bidders of new construction permits and raising \$57,820,350 in net high bids. Specific construction permits auctioned included FM broadcast, FM translator, TV broadcast, and Low Power TV. The auction began on September 28 and closed after 35 rounds of bidding. Auction winners were required to make down payments on their construction permits ten business days after the release of the Public Notice announcing the close of the auction. The Commission also held a separate auction of one FM broadcast construction permit that ended after 15 rounds of bidding. The construction permit raised \$172,250 in net high bids.

The auction rules adopted by the Commission are complex, and may be further modified for subsequent auctions. Briefly summarized, here are the rules that govern the auction procedures themselves; other rules govern important pre- and post-auction matters.

Minimum Opening Bid. The Commission calculates and assigned a minimum opening bid to each facility subject to the auction. Proposed minimum opening bids for radio CPs are based upon the service and class of facility, the population to be covered and recent broadcast transactions. The Commission staff advised that these amounts are intended to represent 5% of the estimated market value of the facilities involved.

Auction Design. The Commission has thus far conducted single simultaneous multiple round auctions. This means that all

bidding for each of the facilities to be auctioned takes place at the same time and starts and ends together.

Up-Front Payments. Each applicant must submit to the Commission an up-front payment in the amount of the minimum opening bid for each of the auctions in which it is eligible, and in which it wishes to participate.

Initial Maximum Eligibility for Each Bidder. An applicant who has applications for more than one facility slated for auction has the option to submit up-front payments in an amount less than the total required for each of the construction permits for which it is eligible to bid. In such an instance, it will be able to submit bids in any given round only for construction permits whose total bidding units do not exceed the amount of its down payment (each dollar of an up-front payment equals one bidding unit). For example, if an applicant wishes to bid for permits A (requiring 20,000 bidding units), B (requiring 25,000 bidding units) and C (requiring 50,000 bidding units), but submits a down payment of only \$50,000, then it can bid only on Permit A, Permit B, Permits A and B or Permit C in any given round but not on Permits A and C, B and C or all three.

Activity Requirements and Activity Rule Waivers. In each round of the auction a bidder must submit bids on permits encompassing 100% of its current bidding eligibility, or suffer a reduction of its eligibility in future rounds to the level of its actual activity. Thus, to continue the example with permits A, B and C, if our applicant chose to submit bids on only permits A and B in any given round (totalling only 45,000 bidding units), it would be unable to bid any more on permit C (which requires 50,000 bidding units). An exception is provided through an "activity rule waiver," which preserves a bidder's current bidding eligibility despite activity in a current round below the required minimum level.

Stopping Rule. The Commission utilizes a simultaneous stopping rule, under which all CPs remain open until the first round in which no new acceptable bids, waivers or withdrawals are received. At that point, the bidding closes simultaneously on all CPs being auctioned.

Revised Ownership Reports

The Commission released a revised (December 1998) edition of its ownership report (FCC Form 323). This revised version requires listing of the gender, ethnicity and race of all officers, directors, cognizable shareholders and non-insulated partners. This information is intended to enable the Commission to assess the current state of minority and female ownership of

broadcast facilities and to determine the need for, and success of, remedial measures. The new form became effective immediately upon its release and supersedes all prior versions.

Since the additional information has not previously been reported, annual certifications of continued accuracy can be filed for a reporting entity only after submission of one of the new forms. Thus, all non-exempt licensees and controlling entities must file at least one of the new reports, even if there has been no change in their ownership or in the addresses or other attributable mass media interests of their principals. Subsequent reports will now be due at every two years, rather than annually.

FCC Releases Study Alleging Discriminatory Advertising Practices

The Commission released a report which charges the broadcast advertising industry with policies that discriminate against minority-owned and minority-formatted radio stations. The Civil Rights Forum on Communications Policy, a Washington D.C. based national non-profit public interest organization, prepared the study under a Commission grant to investigate barriers to market entry and competition by minorities.

The study identified two primary types of discrimination: "no Urban/Spanish dictates" (the practice by advertisers and/or ad agencies of prohibiting the placement of ads on stations that have an urban or Spanish format) and "minority discounts" (the practice of buying time by paying minority-formatted stations less than the rates paid to general market stations with comparable audience sizes). The study attributes both problems to racial and ethnic stereotyping that belie actual market studies.

The study found a disparity by comparing the "power ratios" (that is, market share of revenues compared to audience) of general format stations to those that were either minority-formatted or minority-owned. Advertisers and their agencies bear nearly the full brunt of these findings. Even so, the report does suggest that broadcasters and their national sales representatives may contribute to the problem by including as part of their competitive pitch the discouragement of advertising on minority-formatted stations and the belief that minorities can be reached as effectively through the general media as through targeted media. The report further suggests that some broadcasters may rely upon distorted data generated by audience research services whose methodologies are not approved by the Media Ratings Council.

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Casino/Lottery Advertising

In a unanimous decision, the Supreme Court found unconstitutional the statutory prohibition on airing private gambling advertisements. The decision in Greater New Orleans Broadcasting Association v. U.S. permits those broadcasters located in states with legalized private gambling to air advertisements for casinos and other gambling businesses. The government sought to justify the statute based on the interest of the government to reduce the social cost associated with gambling and to assist the individual states that restrict or prohibit gambling within their respective borders. In finding the statute unconstitutional, the Court essentially concluded that the statute and its implementing regulations were so internally inconsistent as applied to the various activities they covered and specifically excepted from their coverage, that it was not carrying out its stated goal in protecting the public from gambling, or that it was effective in assisting the states in their efforts.