

How Long Does It Take ...

... Before Listeners KNOW What They Like?

An **EXCLUSIVE**

Special
Report

By **Jaye Albright**

How long does it take to find out if radio listeners dislike a song?

How many weeks of airplay does it take to make 'em tired of a song?

Is the fact that two or three like-formatted stations per market all play almost the same songs in nearly identical rotations *hurting* the appeal of that music on the radio?

To try to learn the answers to those questions, I have been tracking audience response to every current

hit tested nationally since the start of the Spring 1998 Arbitron sweep.

In a typical week, I get to see a number of station callout reports from major research companies, as well as national scores on between 43 and 52 titles.

(Continued — See *How Long* on page 2)

Let The Dialogue Roll!

Jaye forwarded her guest "PD" article to several friends and colleagues, who chimed-in with their 2 cents worth — intelligent discourse which is bound to conjure up some additional thinkabouts in your mind. She was kind enough to share the pith of their points as an addendum to her article.

See Page 4 for the views of McVay's **Bob Moody**, Critical Mass Media's **Carolyn Gilbert**, and Core Callout's **Jodie Renk**.

Continuing Education For The Dedicated Radio Programmer

Inside "PD" Issue # 29

Page 2 Improving News-Reliance Attribution (Tandem Teams)

Page 4 More Callout Score Dialogue from Moody, Gilbert, Renk

Page 6 "PD" Stealable Template: Harmonic-Convergence Plotter

Page 7 Seven Steps To Successful Client-Driven Promotions

Page 7 WWWebWWWise:

Page 7 Leadership Cliffs Notes: Cheryl Miller's Power Of Persistence

Page 9 Ocean Toons: The Holiday In Toons

Page 10 Food For Thought: PDQ & A



Programmer's Digest Publisher/Editor **Todd Wallace** is a 30-year programming veteran — as a #1 jock, PD, GM, and station owner. Over the past 24 years, he has provided programming consultation services to over 100 radio stations. Internationally recognized as the "founding father" of the "callout" research concept, over 200 stations have used his systems of "in-house" music, tracking, and perceptual research. Reach TW at (602) 443-3500 or e-mail: TW3tw3@aol.com

How Long Does It Take . . .

(Continued . . . from Page 1)

Since last April, I have been entering all of them — by the number of weeks a song has been played nationally— into a spreadsheet. The tracking of average scores is displayed by number of weeks the songs play.

Here is how the audience felt about — not the best, nor the worst — the average of all of the Country songs (since that is the format I track), played during the Spring, Summer, and Fall of 1998.

| | <u>% Pos</u> | <u>% Burn</u> | <u>% Dislike</u> | <u>% Unfam</u> |
|----------------|--------------|---------------|------------------|----------------|
| After 4 weeks: | 51.95% | 2.58% | 7.03% | 20.35% |

In most cases, this was the first week the song was tested.

The tune had received . . .

- 14 plays in its first week on radio
- 20 plays in its second
- 27 plays in the third week, and
- 29 plays in the week the song was initially researched (the fourth week)

Half of the national sample (52%) was already starting to *like* it, while one-fifth were still unfamiliar with it (based on a 7- to 10-second hook).

The Acceptance-Ratio margin (of positives to negatives+burn) was 5.41:1. In other words, the

**Could it be that
passionate fans,
heavy-users, feel
most positive
about new music
right away?**

odds were 5.4 to one that, by the time that the unfamiliar 20.35% of the sample became familiar with it, they would *also* like it.

| | <u>% Pos</u> | <u>% Burn</u> | <u>% Dislike</u> | <u>% Unfam</u> |
|----------------|--------------|---------------|------------------|----------------|
| After 7 weeks: | 46.9% | 2.70% | 7.32% | 23.90% |

I don't have an explanation for this, just an observation. After three additional weeks of play — in secondary rotation, on average — the changes in acceptance and rejection are significant statistically. Unfamiliarity grew by 17% and positives dropped by 10%. Could it be that *passionate fans*, heavy-users (who are first to hear and recognize new music), feel *most* positive about it right away? Then, their negatives begin to grow after this early positive response as they become more discerning?

(Wallace Wisdom: Kind of like the "curiosity cume" a brand new or newly-relaunched radio station attracts during launch phase as it hits the more "active" listeners first.)

(Continued — See **How Long** on page 3)

Due to the additional space required to present the dialogue about CountryCallout, **Hot-Clock Games: Country** will be featured in "TD" issue #30.

Hot-Clock Games

News & Surveillance Improving News-Reliance Attribution

Perceptions

One of the key factors in establishing a successful morning show for many radio

stations (news-based talk stations and full-service oriented music stations, in particular) is: winning the "morning news reliance" attribution category against your direct competitor(s).

If you don't know whether you do or not, the research question to ask is: "On a typical weekday, which radio station (if any) do you rely upon for morning news?" Then benchmark-trend your station's performance.

A Booster-Shot That Works Fast

If your reliance-attribution scores are less than satisfactory, here's a fast-fix that has both immediate impact and

sustained staying power, too . . .

Tandem-teaming

- ✓ Team-up *two* news anchors to deliver your morning newscasts.
- ✓ Refer to these newscasts by promoting the team, like "The Smith/Jones Report".
- ✓ It sounds "big" (listeners assume since you have twice the team "up-front" you must have a larger team behind the scenes, too).
- ✓ It improves pace, momentum, and story-count. By alternating story-reads, each anchor is able to get "a running start" on each story (Continued — on page 4)

How Long Does It Take . . .

(Continued . . . from Page 2)

Almost all songs in the sample received at least 7 weeks of airplay before being dropped (some were dropped for poor research results, but most drops came as a result of slow chart momentum and not weak callout research test scores). In fact, there are a surprising number of songs that actually test quite well but are dropped from playlists in spite of that fact, due to promotional pressure from competing labels! A small number of songs were dropped after three weeks of play. The majority of songs tested in week 4 were still on the playlist by week 11.

| | <u>% Pos</u> | <u>% Burn</u> | <u>% Dislike</u> | <u>% Unfam</u> |
|-----------------|--------------|---------------|------------------|----------------|
| After 11 weeks: | 65.98% | 3.65% | 8.75% | 6.08% |

The 41% increase in acceptance at this point was due to at least three possible factors:

- ✓ familiarity with the song had gotten up to almost 94% with (by now) an average of 35 plays per week
- ✓ the lower-testing titles had been dropped from play at this point (which, by and of itself, improved the average score)
- ✓ and combined negatives had only increased from 10.02% to 12.4% (a 24% hike). Positives seem to grow faster than negatives.

| | <u>% Pos</u> | <u>% Burn</u> | <u>% Dislike%</u> | <u>Unfam</u> |
|-----------------|--------------|---------------|-------------------|--------------|
| After 15 weeks: | 68.10% | 3.60% | 8.18% | 6.80% |

Now . . . Familiarity has peaked and stabilized. Negatives are steady. Yet, at this point, almost all reporting stations have moved the song from a 38-play rotation to an average country station's rotation of 22 plays, due to pressure from below the song on the to move on to other power records.

And why not? It begins to seem that if a PD or MD kept a song in power rotation until burn increased to *extreme* levels, almost *nothing* would ever go off that station.

| | <u>% Pos</u> | <u>% Burn</u> | <u>% Dislike</u> | <u>% Unfam</u> |
|-----------------|--------------|---------------|------------------|----------------|
| After 19 weeks: | 72.75% | 5.20% | 5.53% | 4.20% |
| After 21 weeks: | 73.68% | 5.00% | 6.25% | 2.65% |

That is an amazing fact about Country radio that makes it totally unique when compared to almost all other formats: BURN is almost totally absent from our universe.

This is, as a general rule, also true about "fit"

scores. Country fans seem, in general, to *like it all* and are not as critical about fitness or developed dislike.

By 18 weeks, the song is off of all current trade charts — yet it's clear that increased play does not make great drops (score-wise) in weeks 15 through 21. Light and medium-users have now become familiar as well and P1 listeners are not yet growing tired of it.

Interestingly enough, all of the markets included in these callout averages have two, and in some cases, three Country stations. It certainly does not seem like fatigue with over-exposed music, or growing dislike for the burnt-out songs, is a problem for Country radio today.

However — it must be remembered that callout research respondents are screened for the fact that they listen to a specific radio format regularly. It may be that the opinions of non-listeners, or those who are listening less lately, are simply not reflected here due to callout *methodology*.

If you are a client of a major consultant like McVay Media or Rusty Walker, you probably already see national callout averages each week.

Not a consulting client? Still want to see callout? Well, you could call Premiere Radio Networks (818) 377-5300 and make arrangements to receive a free sample of Mediabase 24/7. It contains detailed monitor and callout research (available on a computer disk and/or on the internet).

TW Tip #2128, #1076, and #19057

Jaye Albright first started consulting radio stations



and successful groups around the world back in 1983 for Drake-Chenault Enterprises (one of the very first Country consultants).

She also has been a major market manager, programmer, and air talent. Jaye is Director of Country Programming for Jacor.

Effective January 1st, Jaye joins McVay Media as President/Country (following a strategic alliance between McVay and Critical Mass Media). She continues in her Jacor post, overseeing programming on their 27 Country properties.

Contact Jaye by phone at (206) 498-6261 or by e-mail at JayeMcVay@aol.com

Let The Dialogue Roll!

(Continued — from Page 1)

From Bob Moody
VP/Country at McVay Media:

I was fascinated by your study of the effect airplay has (or doesn't have!) on burn scores for Country songs.

I would like to suggest another explanation: that the callout sample doesn't include a representative sample of Heavy users.

When I was National PD with Nationwide, Arbitron headquarters was 35 miles away and I did diary reviews for WPOC and WGAR almost every week. I estimate that I saw about 100,000 diaries in ten years. One thing which began to impress me was how dependant we were on a small group of Heavy Users, which I defined as those who listen a *minimum* of 100 quarter-hours each week.

Later, to my surprise, I learned that **Rhody Bosley** at the Research Director had reached the same conclusion (with the same definition: Heavy = 100+ AQH).

He did a study which showed that the 41.3% of Country P1 diaries contribute 75.6% of the AQH listening. But the 10.5% of Heavy Users give us 43.3% of the AQH!

I began to think about how to keep this small but powerful group happy — since it takes fifty P4s (listening two quarter-hours) to replace *one* Heavy User.

One conclusion was that they are the first to get tired of a song, because they have heard it more than the first of the audience (keep in mind that 100 quarter-hours is a *minimum* — some of these partisans listen 300 QH or more!).

We began to move songs from Heavy Current to Recurrent in about 13 weeks. This didn't make the labels happy, but WPOC enjoyed tremendous ratings. Although I now hold on to songs longer, I think the concept is still valid.

Moody: “10.5% of Heavy Users give us 43.3% of the AQH listening”

Gilbert: “Country doesn't burn. Not because of the screens — it's a *lifegroup* thing”

From Carolyn Gilbert
President/Research at Critical Mass Media:

In response to the “lack of heavy users” thought (in terms of Country burn) . . .

No cigar here. Have seen this now for *years*, with many of our clients using *exclusively* Country P1s in their callout screens. *Country doesn't burn!* Never has. But is burning *more* since the format has gone downhill.

Exceptions: Glen Campbell. “Achy Breaky Heart”. Which means: they (Country fans) understand what burn *is!*

Other formats that don't burn: Black Oldies. *Some* Classic Rock (though even “Stairway To Heaven” is showing its age).

Country doesn't burn. And it's not because of the screens. *Heavily* fragmented and non-core-based formats burn through songs like wildfire (CHR, AOR). Nope. They just don't get tired of it. It's a lifegroup thing.

Jaye shared Carolyn's thoughts with Bob, who responded . . .

I don't doubt that this is true even of tests which screen *only* P1s. But I don't know anyone who screens for a minimum of 25 *hours of listening per week*. That's who I'm talking about.

To which Carolyn replied . . .

Why then, in other formats (that are screened comparably) is burn so high? Riddle us that one?

And . . . Bob answered . . .

Excellent question! I suspect that Country and Black listeners are more reluctant to be critical of formats which are so closely associated with their life group.

(Continued — see Dialogue Roll on page 5)

News & Surveillance Improving News-Reliance Attribution

(Continued — from page 2)

thereby eliminating breath-pauses and naturally speeding up delivery so you can usually squeeze in an extra story.

Does it work? In a word: yes, nearly every time (assuming, of course, that you've combined the

“right” two anchors). In several instances, my clients' news-reliance perception nearly doubled within two months.

The only change was implementation and on-air promotion of the tandem-team.

(Your mileage may vary.)

You'll note that nearly every local TV news operation uses a tandem-anchor approach. Do you think that maybe they've learned something from the tons of research they've conducted about news nuances and viewer perceptions? *TW Tip #7170, #6085, #10049, #9142*

Let The Dialogue Roll!

(Continued — from page 4)

They may “dislike” a specific song because it is “too twangy” or “not really Country”, but “tired of” may be too stern a rebuke. It would be interesting to substitute a phrase such as “heard enough for now” to see if you get the same low burn-levels.

Jaye then shared the article with Jodie Renk, President of Core Call Out (whose company specializes in testing music with heavy-users).

Jodie’s perspective . . .

At Core Call Out, we have acknowledged and tracked the importance of the heavy listeners – we call them Ultra Core – across many formats.

We see a slight increase in the burn scores (from about 13% average burn to 15%) with the most dedicated Country listeners. This runs well below most other current-based formats that we see. Only Urban AC is close (with 17% average burn).

I won’t venture a guess as to *why*. I’m not sure it matters, as we’ve *always* seen that burn manifests itself by depressing the 1-5 (or 1-7) rating score that a song is given. A song that had a 4.3 will drop to a 4.1 then a 3.9, etc., as burn shows itself. The overall acceptance score is much more important than the expressed burn.

I agree that over-focusing on the heaviest users is not the best sampling technique — Arbitron doesn’t actively seek these people out — and it could lead to not being able to see the forest for the trees. Or worse — not seeing the tree for the bark!

Jaye concludes this broad-ranging discourse with another dose of intelligent theory . . .

The reason I wanted to share this thought-provoking dialogue with you is not because I think one of these very experienced and smart persons is right and one is wrong, but because I personally believe that probably they are *all* right, to some degree. And — that is the *art* of this science we call programming research.

As I see it, many Country listeners aren’t with us to hear *hits*. That’s why actions like John Sebastian’s KZLA experiment two years ago (of super-powering some strong callout testers up to 70 times per week) didn’t increase burn on the songs played every 2½ hours — but didn’t increase Cume or Shares either.

This is not to say that music quality doesn’t matter to country fans.

In fact, as anyone who knows my music philosophies will testify, my approach — which has worked for me for more than 25 years — is to ask listeners what they like most and to keep playing those songs until they start saying they don’t want to hear them as much anymore.

However, the truth I see in Moody’s statement is that there are some very heavy users of Country music radio who listen to us much like the folks who listen to Easy Listening radio. They want “variety” of texture, tempo, and style, and the voices of familiar artists as much as they want to hear a bit of fresh, new sounds which they deem to fit their definition of “Country”.

A problem with catering only to 100+ QH users is that at this time, when Arbitron is working hard to get at-work listeners into their sample and aiding recall of at-work listening by asking for their work ZIP-code while also offering more eye-catching diary packaging, higher \$\$ premiums and more frequent reminder calls during their survey week to homes with 18-34 males (who are, as a general rule, *light* — to say the least — users of Country today), is that Country super-core listeners are only *inconsistently* being represented in Arbitron samples.

If we focus only on them in our research, we will experience even more inconsistent book-to-book results than we do now.

Thus, I recommend looking at both super-core, ultra-heavy users *and* comparing their opinions on music with the lighter users who are the majority of our cume.

I agree that Country is unlike the higher-cume mass appeal formats in very important ways and that seemingly very sensible research-based tactics from these other formats — like ultra-powering high-testing songs — don’t, in and of themselves, have the desired effect in either improving Country Cume or TSL.

It is more complicated than that, due partially to the extremely broad demo that a Country station requires in order to maximize its Cume and Time-Spent potential.

You must do the research. You must pay attention to it. Yet, you must also remain sensitive to the tastes of all listeners in your cume, making use of data to prioritize the common threads that unit them. Stations that get *those* priorities right *win!*

And *those* priorities definitely change over time, since today’s 35-44 Country fans were our 25-34’s in 1989.

But one thing as *not* changed — as Carolyn noted . . .

Billy Ray Cyrus’s “Achy Breaky Heart”, which rated as “a favorite” by 35% of the national auditorium sample, is still “tired of” by 40% of the sample. And “never liked” by 17% of those tested! Billy Ray may be back on current Country playlists, but for stations doing research, his very first hit is definitely *not!*

TW Tip #1078, #2130, #7174, #19059, #20022

Next Week

John Sebastian’s view of how his “out of the box” philosophies impacted on KZLA’s ratings

Programmer's Digest

The Insert

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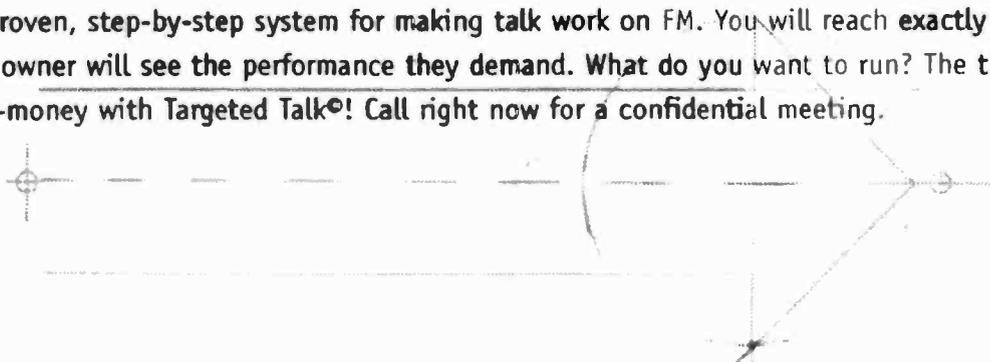
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Hub & Spoke:

The Next Phase Of Consolidation

As the radio industry rapidly consolidates, the first phase appears to be pretty well over. Most markets are now controlled by a handful of players.

The next move: for those consolidators to begin to build regional clusters around their larger markets. These spokes involve the addition of smaller stations in immediately adjacent marketing areas.

The old limits on numbers of stations owned kept this logical development from occurring. Now radio operators are extending their reach in the same way newspapers have done for years with regional editions.

It all adds up to *new ways to increase revenue.*

As the industry continues to redefine growth, it looks to professional advisors to help chart this process. That's why smart owners call on America's leading independent broker:

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7 Steps To Successful Client-Driven Promotions

(Continued — from page 7)

still preserving the integrity of listener perceptions about your station's promotional image. You don't want your listeners thinking that *you* think it's cool to give away crappy prizes — **remember you are as strong as your weakest prize.**

Sometimes, of course, the client insists on call-letter tie-ins (because they like the "association", as if the station is officially "endorsing" their product or service). But many times it's the salerep who just automatically (for no real reason) attaches the call-letters to their proposal. To prevent this: educate the sales staff that anytime the calls are attached to a promotion, it must be done so with Programming's approval. Word to the wise: PD's shouldn't automatically veto every value-added promo that comes along. The reality of the consolidated marketplace means that these days we, every now and then, have to hold our nose and do a few promotions that don't perfectly fit the programming model. Choose your battles wisely. But at the same time, always try to stand on principle (*you should* always be trying to act as the ombudsman for your listeners, protecting them from mediocrity and schlock).

✓ Participative Promotions

A 15-to-30-minute brainstorming session with two or three programming staff members can help a salesrep devise several possible methods that will motivate customers to fulfill a client's needs or goals. More importantly, programming staffers are more likely to suggest ideas that *won't* compromise the station's air-product or image. During this "madman" phase of idea-generating, you don't want to inhibit the creative flow of ideas or concepts. Make a point of writing down (or posting on a whiteboard) *all* ideas. Remember, the best way to create or develop an idea is by utilizing *teamwork*. And the more people you involve in the process, the more possibilities you'll germinate. (For more deep background about the virtues and principles of Participative Management, see "PD" issue #7, page 1).

✓ Help The Client Choose

Narrow the brainstormed options to the 3 or 4 very best "possibilities" and present them to the client in a preliminary meeting. In this way, not only does the client get a "preview" of several ways to skin the cat, but may be inspired to contribute useful ideas (or even additional budget or prizes) to make the promotion more effective. Most clients will be impressed . . .

- that so many people at the station "cared" about his/her promotion (even if your call-letters aren't attached to the promotion, the he/she will think the whole station is behind it because of all the helping hands)
- and that so many options were presented (note: remember to recycle the unused promotions for the "multiple-choice" pitch to another client)

✓ Iron Out All Logistics

Once the promotion is selected, a specific proposal detailing the objectives of the promotion and how it will be executed should be prepared.

Pre-Promotion. Don't forget to include all pre-promotion impressions in your proposal (3-5 days of pre-promotion not only enhance frequency, they make the promotion more effective).

On-Air Execution. Dot all the i's and cross all the t's. If the promotion involves a contest, don't forget to count both the solicitation *and* the participation liners as separate impressions (they are!)

Point-Of-Sale. Include all in-store or point-of-purchase requirements in the prop.

The Program Director, Sales Manager, General Manager, and Promotion Director should all be involved, to make sure nothing has been overlooked.

✓ Put Together The Final Prop

Once everyone in-the-loop has signed-off on the promotion, a final proposal should be presented to the client. A good way to stress urgency with clients is to attach an approval deadline. In this way, the client knows that it's only a "limited time offer" (which usually manages to light a fire in the right place) and a good client-promotion isn't tied-up for months waiting for a decision. (If the client declines or misses the deadline, you have a strong promotion to take to another prospect, perhaps one of his/her competitors). This is the time to determine if the client has any reservations or questions about the promotion (which need to be addressed with authoritative answers and solutions).

✓ Follow-Through & Follow-Up

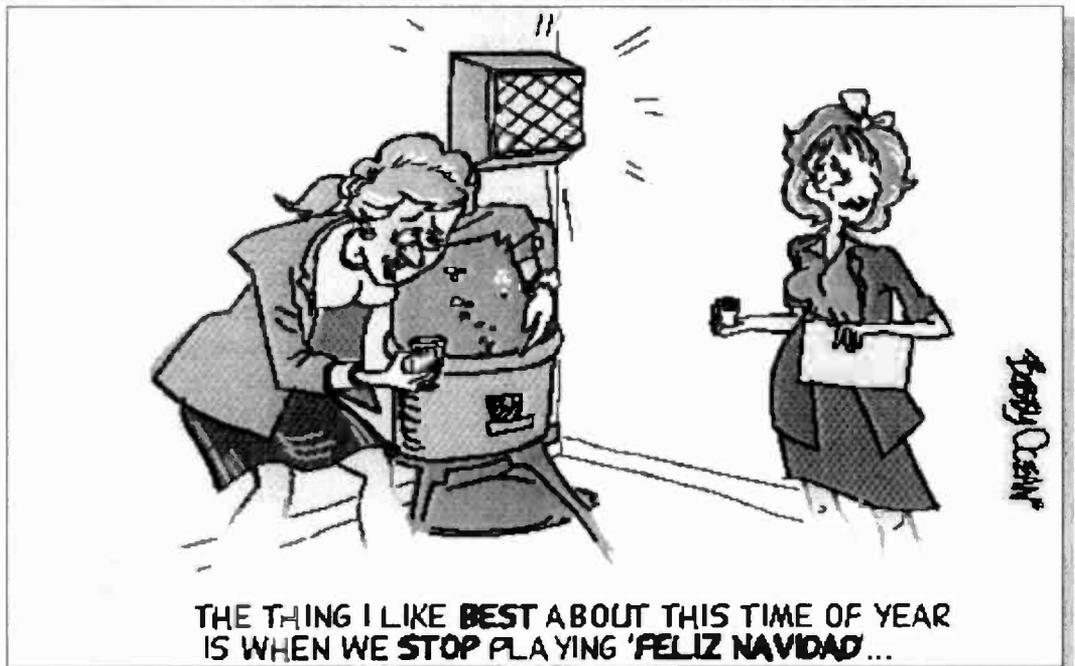
- **Before:** Once approved, kill a tree (memo *everyone!*) And don't forget to make sure your *receptionist* is on the memo-list. (The salesrep should work closely with the client to make sure everyone on that end is also up-to-speed on what will be happening when).
- **After:** Conduct an objective internal post-mortem to discuss what worked (and what didn't). The more people involved, the better. Address any problems with ways to improve the promotion next time (even if for a new client). Then include the client in rear-view process (many salesreps don't like to give clients an opportunity to bring up negatives, but in this case, it's necessary to insure future success and true client satisfaction).
- **When your promotion is a smashing success:** The timing is perfect to pitch future collaborations (as you're talking about ways to make it even better). In fact, a celebratory lunch might be appropriate (giving you the opportunity to praise key players who were central to the success of the promotion). This will also *underscore* the notion that when a client signs-up for a promotion with your station, they get a *team* who will make it work!

TW Tip #3159, #4087, #7169, and #17035

Ocean Toons®

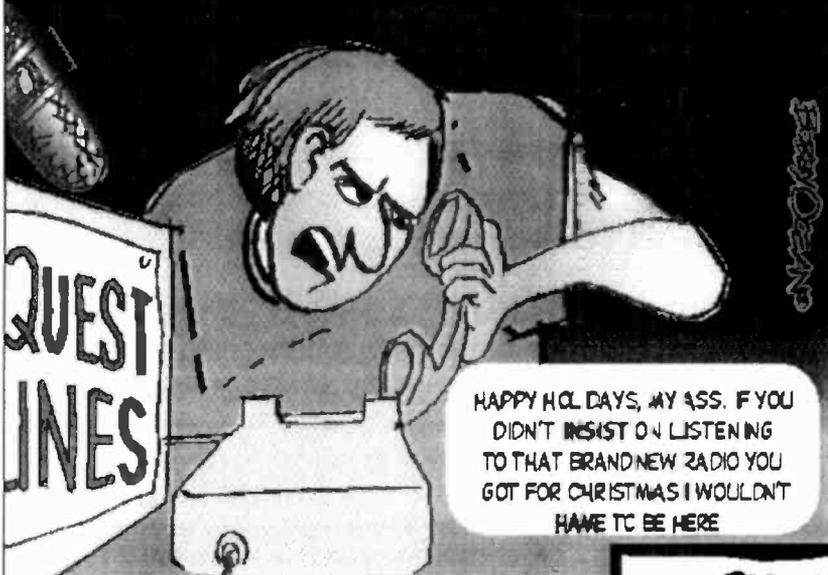
Check out Bobby Ocean's creative web site at www.bobbyocean.com. Full of interesting ideas, links, quotes, production samples, and voiceover demos. E-Mail Osh at oceanvox@pacbell.net

Jeff Young's Radio 411 (www.radio411.com) is the cyber-home of Ocean Toons and the Bobby Ocean Cartoon Gallery.



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"Build a system that even a fool can use — and only a fool will want to use it."

— George Bernard Shaw

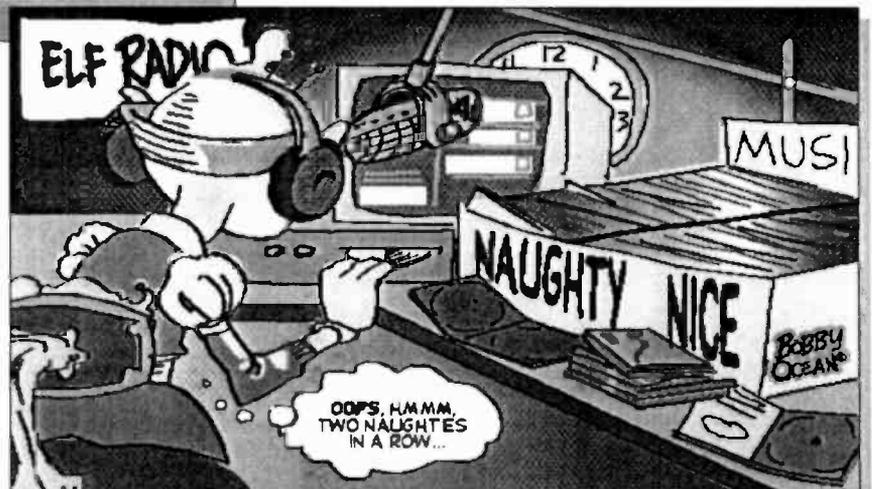
Do you think this applies to radio formats, too? Just asking.

TW Tip #1077, #7172, #12010

"Sometimes you have to respect your competition so much that you treat them with no respect at all."

— Pat Riley

TW Tip #7173, #8046



OOOPS, HAMMM, TWO NAUGHTIES IN A ROW...

Programmer's Digest

Food For Thought

Thanks For Your Feedback!

A big **thank you** to everyone who returned our "PD" 6-Month Check-Up questionnaire-diary. The response-rate has been great! (And, thank God, so have the reviews!) You may have already noticed some of the subtle changes as a result of your ideas. (I'll be sharing some of the feedback with you in future Food For Thought columns).

And to those who haven't gotten around to it yet, **it's never too late*** — we still update the likeability, "fit", and "want more/less" results (and our "grade-point average") after each new returned-diary is received (and I absorb every word of constructive critique about how we can make **Programmer's Digest** a more effective programming tool for you).

* If you've misplaced your Check-Up Questionnaire and would still like to participate, just call, fax, or e-mail us and we'll get one out to you, post haste. Ph (602) 443-3500. Fax (602) 948-7800. E-Mail: TW3tw3@aol.com

One of the best suggestions came from one of our subscribers in the Great White North. **Darren Stevens**, PD of B101FM in Barrie, Ontario suggested that we start a weekly Question-Of-The-Week feature that gives readers direct-access to my broad background as a programming consultant. This way, a "PD" reader can ask a specific question (no holds barred) and I'll provide a detailed answer (in print). Darren even came up with a cool name for the feature ...

PDQ & A

We'll start it next week (with issue #30). Since it's Darren's idea, I thought it only fitting that he should be allowed to ask the first question.

If **you have any questions** you'd like me to address, fire 'em off to me whenever the inspiration hits. (In fact, why don't you think of a few questions you'd like some answers to **right now**). No question is too dumb! (Or too curly!) If you'd prefer to not be identified, we'll respect that, too (though we'd prefer to be able to attach a name and station to each question).

While the "A's" will be based primarily on my warped sense of values and weird way of looking at the world, I'll occasionally call upon other PDs and experts for additional comments to round out the perspective (and we'll invite other readers' input, too). Think of it as programming consultation without the expensive pricetag. Should be a lot of fun!

Finally, a toast — here's to a great '99 for all of us!

All The Best,

Coming Next Week In The World's **Fastest Growing** Programming Newsletter

"PD" Hot-Clock Games

And

Ben Fong-Torres' new book
**The Hits Just Keep On Coming:
The History of Top 40 Radio**

Also

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