

# SMART MEDIA™

MAY 2007

## The 2007-2008 Television Upfront Navigating in digital waters

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Taking the DQ brand  
and logo to new heights

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Giving broadcasters online  
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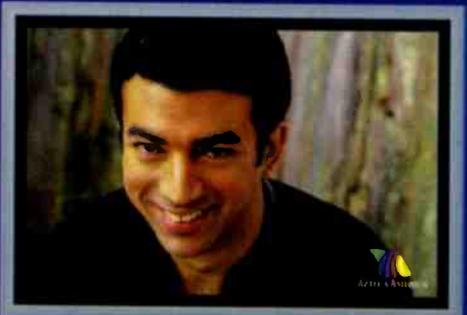
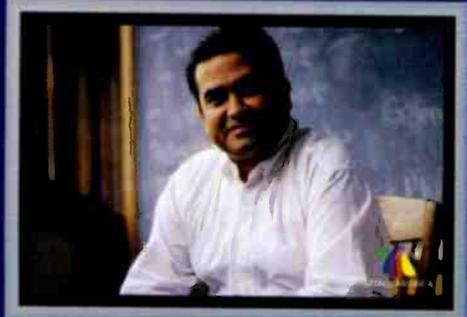
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## 6 FEATURE The Television Upfront

Navigating the upfront in digital waters: While word has it the 2007-2008 upfront may be a strong one, the digital card plays a strong role in figuring the bottom line. We speak to buyers and sellers in this annual feature.



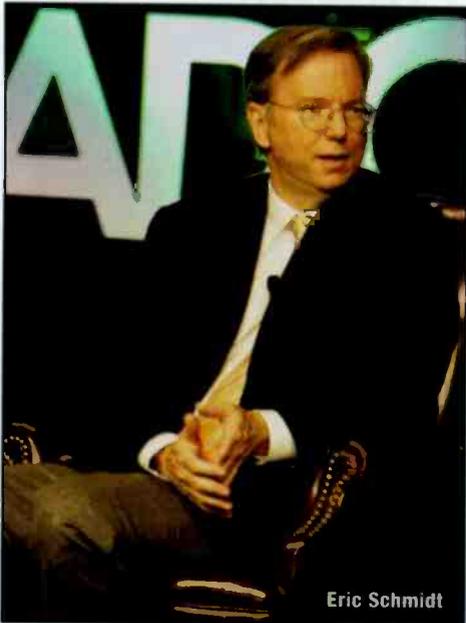
**Cover Art (top to bottom):** Bill Cella, DraftFCB Vice Chairman. Christine MacKenzie, Chrysler Group Executive Director of Multi Brand Marketing & Agency Relations. Mike Jackson, Vice President of Marketing and Advertising for GM North America. Josh Wexler, Software Media Exchange CEO

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## Google signs with CCU; wants to partner with broadcasters

CEO **Eric Schmidt** sought to dispel ideas that Google poses a threat to broadcasters as he spoke before the NAB2007 convention in Las Vegas. Speaking just a few hours after announcing a major deal for Google to sell radio ad inventory for Clear Channel Radio, Schmidt called it the "defining deal for our radio business." Rather than competing with traditional radio ad sales organizations, Schmidt said Google's business model is not to target traditional radio advertisers or replace radio sales staffs, but rather to bring new advertisers to radio. "It should result in significantly more revenue for Clear Channel," he said.



Eric Schmidt

The multi-year relationship that enables Google to sell guaranteed :30-second ad inventory on more than 675 of Clear Channel's stations. CC pre-sold about 200 million of ad time to Google for each of the next three years. :30's account for about one-third of CC Radio's total inventory. The ad inventory made available through the deal represents about 5% of its total. These stations are in 85 of the top 100 markets and reach 90% of the US population P12+.

The move adds to an existing online ad partnership in which Google provides text ads to CC's radio station websites.

For Google, Audio Ads advertisers now have increased distribution through premium radio properties across all regions of the United States, enabling them to reach specific audiences, at specific times, in targeted geographies.

For Clear Channel, this agreement opens up an additional sales channel and provides supplemental revenue by making Clear Channel inventory available to advertisers who previously had not used radio.

Addressing the industry worries of commoditizing radio inventory, CC says its national and local sales forces will continue to focus on the company's most lucrative advertiser relationships, and on the many advertisers who seek specialized advertising packages and concepts. Google will focus primarily on advertisers who currently run ads online but do not run ads on radio.

For CC, the move is part of a larger initiative to differentiate its on-air ad inventory. The company created a number of special positions (such as first-in-pod and islands), new and spot types (adlets and blinks) and creative resources (the Creative Services Group).

**SmartMedia Observation:** As noted in an email from CC Radio CEO **John Hogan**, advertisers can buy specific markets and demos, but not specific stations. Advertisers that wish to buy specific still have to go through the regular channels.

We heard the rank and file sales folks at CC Radio aren't necessarily taking it well, at least just yet: The salespeople and some executives are upset about it for three reasons. 1) They are no longer the exclusive sellers of Clear Channel advertising. 2) Already, buyers are saying to these sellers they will first compare avails from Google and Clear Channel and then go with the one that's better. 3) In Hogan's letter announcing the deal to GMs and market managers, he said, "We are partnering with arguably the hottest sales organization in the world and they will be helping us sell more of our available time." Some folks in Clear Channel Sales were apparently livid over that and found it to be degrading. ■

## One Zell of a good time

Folks in radio have some acquaintance with **Sam Zell**, from the time that he was the primary investor behind Jacor Communications (also a bit of TV there as well). Zell made a lot of money on that investment when Jacor was sold to Clear Channel. Now he is back to try and repeat that in the newspaper and television businesses (with a single radio station thrown in).

Zell emerged the victor from a long, drawn-out auction process at Tribune Co., in which he was actually a late entrant. If all regulatory approvals are received—and that is far from guaranteed—Zell will become Chairman of Tribune, with lots of new debt taken on by its new largest shareholder, an Employee Stock Ownership Plan (ESOP). Zell, known for his real estate dealmaking, came up with the ESOP approach as a tax-favored way to bid \$34 per share to buy out the public shareholders of Tribune, including the restless Chandler family, currently the largest shareholder.

The big obstacle facing Zell and Tribune CEO **Denis FitzSimons** now is the FCC. With the ownership change, Tribune will need new waivers of the crossownership rule for all of the markets where it has both newspaper and broadcast properties—even Chicago, where the long-standing combination of WGN-AM & TV and the Chicago Tribune was grandfathered because it pre-dated the rule. The first step of the planned buyout can be completed without FCC approval, because less than 50% will change hands, but completing phase two to buy out the remaining stock and go private is going to take some begging in DC. But what if that doesn't work?

"If phase two does not move forward, we have returned significant cash to our public shareholders, established an ESOP, brought Sam Zell onto the board and remain a public company," said Tribune spokesman **Gary Weitman** in response to our question.

## Competitors ask court to toss PPM patents

The Media Audit (TMA) and Ipsos, co-developers of a Smart Cell Phone-based radio ratings system, have fired back at Arbitron's lawsuit accusing them of infringing patents related to Arbitron's Portable People Meter (PPM). In separate responses to the lawsuit filed in federal court in Marshall, TX, both TMA and Ipsos deny any patent infringement. Rather, they ask the court to rule that all three patents claimed by Arbitron are invalid and should be thrown out. It is anyone's guess when the case will go to trial.

Meanwhile, TMA/Ipsos are testing their system in Houston, while Arbitron is moving ahead to deploy PPM and make it the industry standard, regardless of what anyone else is trying to do. Houston and Philadelphia are up and running, with more major markets to come.

The Nielsen Company

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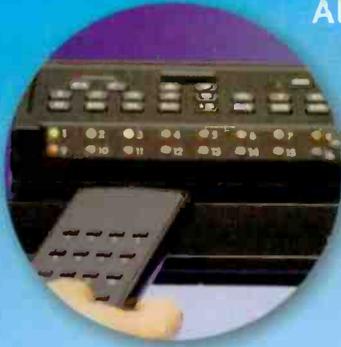
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## Tracking the upfront as digital platforms abound

Seems the 2007-2008 upfront may be a strong one, but as you'll read, the digital card is a strong one in figuring the bottom line this time around for traditional television media. Analysts like Merrill Lynch's **Jessica Reif Cohen** forecasted this upfront market will be much stronger than last year, with CPM pricing increasing mid single digits and overall commitments up low single digits. The outlook is based on the unusually tight market for scatter as well as the 2008 presidential elections and Summer Olympics.

Cohen predicts a 3% increase in total revenue for the broadcast nets this year to 8.7 billion. For the Big Four, the expectations are for 4% total dollar amount and CPM increases. On the cable side, she expects Discovery to be "the biggest winner."

She forecasts 5% revenue and CPM increases for ABC, which should score 2.1 billion, while her predictions for Fox are 4% increase in CPM and 6% revenue increases for a total of 1.8 billion. NBC, stabilizing its schedule should score a 3% CPM and 5% revenue increases to 1.9 billion. CBS is expected to continue as the revenue leader with a flat 2.2 billion—the network "has the most to prove to advertisers as, despite a stable schedule, it has suffered ratings losses on the all important Thursday night," Cohen wrote.

The CW also is poised to finish flat from last year, while MyNetworkTV, whose low ratings have prompted a major schedule overhaul, is expected to be down 20%.

A note of caution to the networks, however. As MPG CEO **Charlie Rutman** points out, just because scatter is strong, the market conditions are still trending differently: "While scatter has been fairly strong, the market is very similar to last year in that there is not a rush to buy. There are plenty of interchangeable parts, budgets will be close to flat, and unlike years past there will not be any big rewards for buying early or big penalties for purchasing during the year."

How do others describe this year's marketplace, compared to last year's?

"Both challenging," cites **Christine MacKenzie**, Chrysler Group Executive Director of Multi Brand Marketing & Agency Relations. "Last year there were numerous issues that were up in the air prior to the negotiations: DVR usage and viewer commercial avoidance, numerous streams of measurement and debate about accepted currency. To a degree not much has changed or been resolved. DVR's continue to increase and we now will have access to even more Nielsen data—average commercial ratings. The industry continues to try and sort through it all."

On the strong scatter market, MacKenzie says from what she's heard depending upon your timing and inventory requirements, scatter advertisers on average were looking at paying something over their upfront pricing.

Notes **Nina Kanter**, MPG VP/Director, Communications Analysis: "While scatter has been fairly strong, the market is very similar to last year in that there is not a rush to buy. There are plenty of interchangeable parts, budgets will be close to flat, and unlike years past there will not be any big rewards for buying early or big penalties for purchasing during the year...We'll see a continuation of last year's comparatively reasonable and rational marketplace across all mediums. We believe that fear of the unknown, which was a big driver of price inflation in years past (scatter or alternate purchase periods or product) is gone."

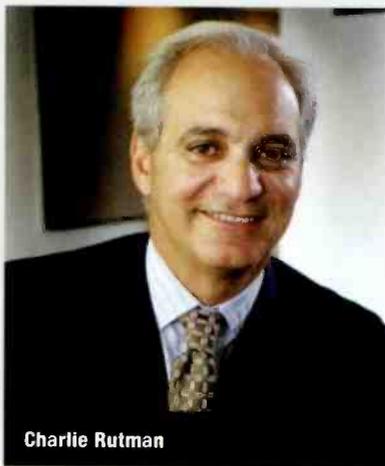
Adds **Andy Donchin**, Carat Americas Director of Broadcast Buying: "This year's marketplace had a lot less money in the upfront marketplace and a lot more money in scatter. Scatter has been constant. There has been a constant flow of money into the marketplace which has been very welcomed by the networks."

**Mike Rosen**, President of Investment and Activation, GM Planworks, says the scatter marketplaces in national broadcast and cable have been relatively active to start 2007, especially when compared to the past few

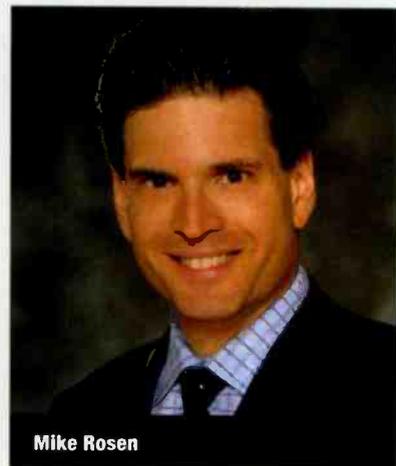
years, with a couple of categories, such as wireless, stepping up their battles. However, "while it has been a tradition to read the tea leaves of a healthier scatter as an indicator of the strength of the next upfront, I believe that the changing dynamics of the marketplace make it harder to use one to predict the other."

"Scatter has been stronger this year than last. However, I still think the market, for the third year, is going to be flat of sorts," observes **Bill Cella**, DraftFCB Vice Chairman. "I know traditional dollars are being shifted to new media. I think that if the networks and cable networks and syndicators are able to articulate a strong connection between their traditional media and what they have online or in digital, they can generate more money because there is more money going into the digital space—without a question. It's really incumbent upon them to be able to sell the agencies and their clients on robust connections between their traditional content with whatever they've got associated online. That's where I think their lucky strike extra is. They are all working very hard to make that a viable thing."

It might be a hard thing to read in figuring upfront dollars. If a network strikes a bunch of package deals with traditional and digital media, it might



Charlie Rutman



Mike Rosen

actually show up as less for the networks' traditional media upfront, right? "Correct," says Cella. "It depends on how they bill it. They could do it all on the traditional network or vice versa. I think there is a lot of pressure on the networks to start to monetize their expenditures in digital."

So they're not going to bill it as one lump thing, they're going to try to separate them? "Probably," Cella added. "So that's a big challenge for them, but I think that's sort of the wave of the future."

Meanwhile, broadband-only networks like AOL continue taking dollars off the table with their own programming. With a less expensive infrastructure, online broadcasters can offer ads much cheaper. AOL will introduce five new programs that will launch in the fall and early 2008 in partnership with leading production companies including Mark Burnett, DreamWorks Animation, Endemol, Madison Road Entertainment, Stone & Co and Telepictures. An Ellen DeGeneres Show tie-in is but one example.

What about pre-upfront conversations with buyers? **Jon Steinlauf**, SVP/ad sales for Scripps Networks, tells us the pre-upfront climate was healthier than in the past two years. "TV viewing is at a record level and the programmers and media agencies are more committed to sifting through 'new media' options together to find the best approaches on extending and activating TV buys. Advertisers appear to have more confidence in the TV medium now than last year. The flat screens and hi-def service are enhancing the receptivity not just of the program content but also the advertising. From Q3 '06 through Q2 '07, scatter volume growth and CPM increases

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# TELEVISION UPFRONT

have been substantial for Scripps and from what we hear for many other network groups as well. Cancellation options are light this season. This points towards a stronger upfront market than we've seen in the past two years."

As to upfront as usual, this year has seen a bit of reduction on the glitz & glamour side of things. While it will always be a part of the process, folks are finding less and less time to attend the huge upfront dance cards.

Says **Paul Alexander**, Campbell's VP/Global Ad Sales: "I think like most marketers, the transparency of the process is desired—more of the emphasis on the real discussions versus the glitz, the glamour and the parties. Just getting down to the brass tacks of what are the objectives and what we are trying to accomplish. I think greater focus on that would serve everyone. Inevitably we're going to get there. It's happening slowly and I think the marketers are going to continue to demand that as accountability becomes more and more important. The traditional media is still working, so the upfront will still be important, but I think to the point of convergence, as new technology comes into play it's going to put pressure on the upfront and it's going to create more of a market for the client. It's going to be less about the show and the publicity."

GroupM Global CEO **Irwin Gotlieb** adds, "If you look at my various comments over the years I was never one to speak out against the upfront. I think it has its place in our business. That doesn't mean that we cannot improve on some of the processes and practices that have evolved—starting with the way the material is presented to us in the first place and going through some of the specific processes that are deployed in the way that the market is conducted."



Andy Donchin



Jon Steinlauf



Mike Jackson

## New techniques

The Wall Street Journal recently wrote a story about FOX and other networks running entertaining vignettes inside commercial pods to keep viewers tuned in during the breaks. Is it just more clutter? Do networks need to reduce promotional tune-in ads and keep it more to just the spots? Would that lead to higher ad awareness and retention?

"I think what the networks are doing they're trying to get more engagement with their content through an association that's unusual, different," responded Cella. "When I was at ABC Sports we were able to have four vignettes in each Monday Night Football game. The company then made a decision to only have two because we didn't want to deal with clutter. We wanted to unclutter the environment. The reality is I applaud the networks for trying to figure out ways to further engage clients. However, there is a fine line between engagement and over-cluttering the environment. The Content Wraps that the CW has done I think are cool. We just have to be careful of over-commercializing an environment to engage with clients."

## Program integration

What about program integration deals—hot or not for this upfront? "Very hot, and important," insists Rutman. "As the competition for consumer

attentiveness to commercials (fast forwarding, multi-tasking, etc) gets more intense, marketers are becoming more interested in being part of the content where viewer attentiveness is believed to be higher. But it's more than just attentiveness, it's about connecting with consumers in a meaningful manner. To do this, product integration should be relevant to the program content and the viewer. Otherwise, it's just a loosely veiled prop which will not be as effective."

**Mike Jackson**, VP/Marketing and Advertising for GM North America, said GM's efforts in branded entertainment, which include, but are not limited to, the placement of vehicles into programming content, will always be an important component of the company's fully integrated marketing strategies. "And not just during the upfront, but all year round. Product integration is one aspect of a broader effort to align GM's vehicles with programs and characters that fit well with our brands, and those integrations often become natural jumping-off points for deeper marketing partnerships and promotions with the shows, the goal of which is to bring the viewers a closer, richer experience with the vehicles themselves."

Steinlauf's experience with all five of Scripps' networks, builds upon the authority of their brands to create short form programs that integrate clients' branding and messaging. "What is unique about our efforts in this area is that we can stay on-brand and seamlessly deliver the viewer valuable information about their special interests with unobtrusive sponsor integration. Our latest innovation in seamless short form is multi-part story driven interstitials with sponsor integration. These short stories' unfold as a show within a show and new chapters can be developed as the storyline continues. The concept is effective at holding the audience through the breaks and it keeps them off the fast forward button in time shifted views."

In longer form shows, they have a handful of opportunities for branded entertainment/prizing, mostly on DIY, Fine Living, and Great American Country."

## Commercial minute ratings

What do you agencies think about Nielsen's semi-recently unveiled plan for commercial minute ratings? How will it play a role in negotiations for this upfront? Agencies really want to know what the loss is when viewers go from program to commercial; and then what happens when they go from Live to Live Plus Same Day or Live Plus One or Live Plus Three.

It wasn't long ago when both the buying and selling communities would have insisted that there needs to be one standard currency as the basis for all negotiations across the industry. "But we are probably moving away from a one-size-fits-all approach to audience measurement, as media vendors and advertisers will choose among different measurement metrics that best match their needs," says Rosen. "And that will run the gamut from program ratings to commercial ratings to engagement data to hybrid versions of the three."

How will Nielsen's recently-unveiled plan for commercial minute ratings affect upfront negotiations, if at all? "We are totally entrenched in working to see what is up commercial ratings," explains Donchin, "but our concern is the dearth, the limited amount of information we will have as we get into our negotiations. Nielsen is going to be releasing stuff in May and even though we can go into N-Power (which is somewhat cumbersome) and try to figure out what's going on with commercial ratings, we are concerned about the limited information we will have when we will probably be negotiating. We would like to have a whole year's worth of information to properly evaluate this so we can let our clients know what to expect."

"Nielsen is going to come out the end of this month, which is a little bit late," says Rutman. "The ideal thing is to be able to evaluate program ratings next to commercial ratings, which hasn't happened. I think there could be a sort of cornucopia of deals going on this year because people want to do commercial ratings. I think it all should be standardized because when you have a lot of different things going on it slows everything down—which is

## The cash-machine formerly known as RevenueSuite returns to the airwaves as Google AdSense for Audio.



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also not a bad thing because then you can really evaluate deals better. I think there are going to be a bunch of different things being looked at this year."

"The buyers, sellers and Nielsen will be hammering out the details and it's too soon to predict if we'll move to a new system of measurement this May. There are many hurdles to overcome between now and then," MacKenzie forecasts.

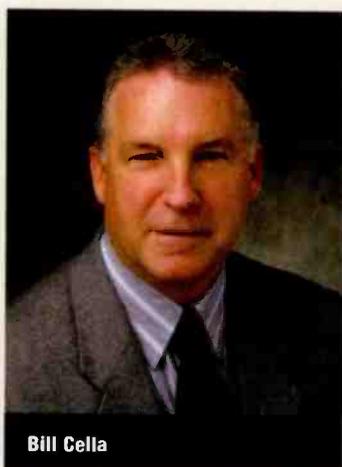
Donchin also noted Carat is very adamant that they don't want to count any DVR ratings when they cannot properly subtract the people who are not watching the commercials: "These are the things that concern us—the lack of information, the leap of faith with counting anything but live ratings. We'd like to get commercial ratings up and running with enough information and knowledge that will take into account the people who are fast forwarding."

## Program development

What about program development meetings this year. Did any really stand out this time around? What were some common themes? **Lisa Quan**, VP, Director of Audience Analysis, MAGNA Global, noted is always difficult, at this point of the development process, to make predictions for the fall. What looks good on paper can be executed badly and vice-versa. "There are roughly 100 scripted series pilots in development every year and it's impossible not to have concept similarity among several shows. This year we've seen a several repeating themes: Working women doing things their way to get around the establishment; Americanizing U.K. series (and



Shari Anne Brill



Bill Cella



Christine MacKenzie

actors); Successful working women juggling personal lives; Several shows use New York City as the setting for dramas; and More drama with female leads, not of the hot, young thing variety.

Taking a stab, these programs will likely make the network schedules (some are guaranteed) – Action News and Canterbury's Law on FOX; Dirty Sexy Money, Women's Murder Club, and See Jayne Run on ABC; I'm in Hell on CBS; Bionic Woman, Fort Pit, and The IT Crowd on NBC; Gossip Girl and Aliens in America on CW."

Said **Shari Anne Brill**, Carat USA VP/director of programming: "The four networks business strategies ranged from multi-platform solutions through message integration within the programming itself. Quality content with distinctive and edgy voices will seamlessly drive viewers (who also happen to be consumers) across the various distribution platforms. There were also major program themes that emerged. Supernatural elements, superheroes—specifically a remake of the Bionic Woman. Also there were several shows dealing with heaven, hell, and purgatory. CBS is developing a series based on zombies living on Long Island. (Not sure if "living" is the right term since they're zombies). Also intriguing is Fox's show about a 417-year old detective.

Also noteworthy for the upcoming season are dramas and comedies that promote diversity and tolerance, specifically CW's *Aliens in America* (about a Pakistani teen exchange student in a Wisconsin town) and ABC's *Cavemen* featuring the Geico characters as they go about

daily life in Atlanta. "Overall there will be much less serialized storytelling," predicts Brill. "Dramas being developed will be lighter in tone and will take on more of a dramedy format. Many comedies and dramas under development will also explore workplace themes. Crime and Punishment remains an enduring theme. Fox's *K-ville*, about the police department in the aftermath of Hurricane Katrina looks particularly compelling."

## Digital and web extensions

As has always been the case, investing/buying is rooted on an exchange of equities between marketer and content producer. Digital extensions only deepen the opportunities for all involved to satisfactorily relate to one another. Do buyers and sellers foresee more buying activity associated with digital/web extensions of TV programming? Cella says clients are experimenting in a lot of different spaces, taking five, ten and twenty million dollars of their budgets or even more and buying 30 or 40 different things to see what resonates.

The Weather Channel's broadband channels are rich in content and will be sold in conjunction with on air—see [www.weather.com/epic](http://www.weather.com/epic). *Second Life* is another example of TWC embracing new technology, being first in this space and being innovative in providing weather to their audience in many ways. They also see *Second Life* as a potential advertising platform for brands currently partnering with them.

**Michael Teicher**, Warner Bros. Domestic TV Distribution EVP/Media Sales, says they've reorganized the TV Group in such a way that allows marketers to participate with on more of a 360 degree level. "We have built our expertise and hired a digital sales force to work directly with our linear team to create more marketing and media based solutions that span from purchasing thirty second spots to branded entertainment to websites and mobile initiatives. The response on Madison Avenue has been fantastic and given that reaching women on the web can be challenging, combining top notch brands like *Ellen*, *Tyra*, *Extra* and *TMZ* means we can be given consideration from multiple pools of marketing dollars."

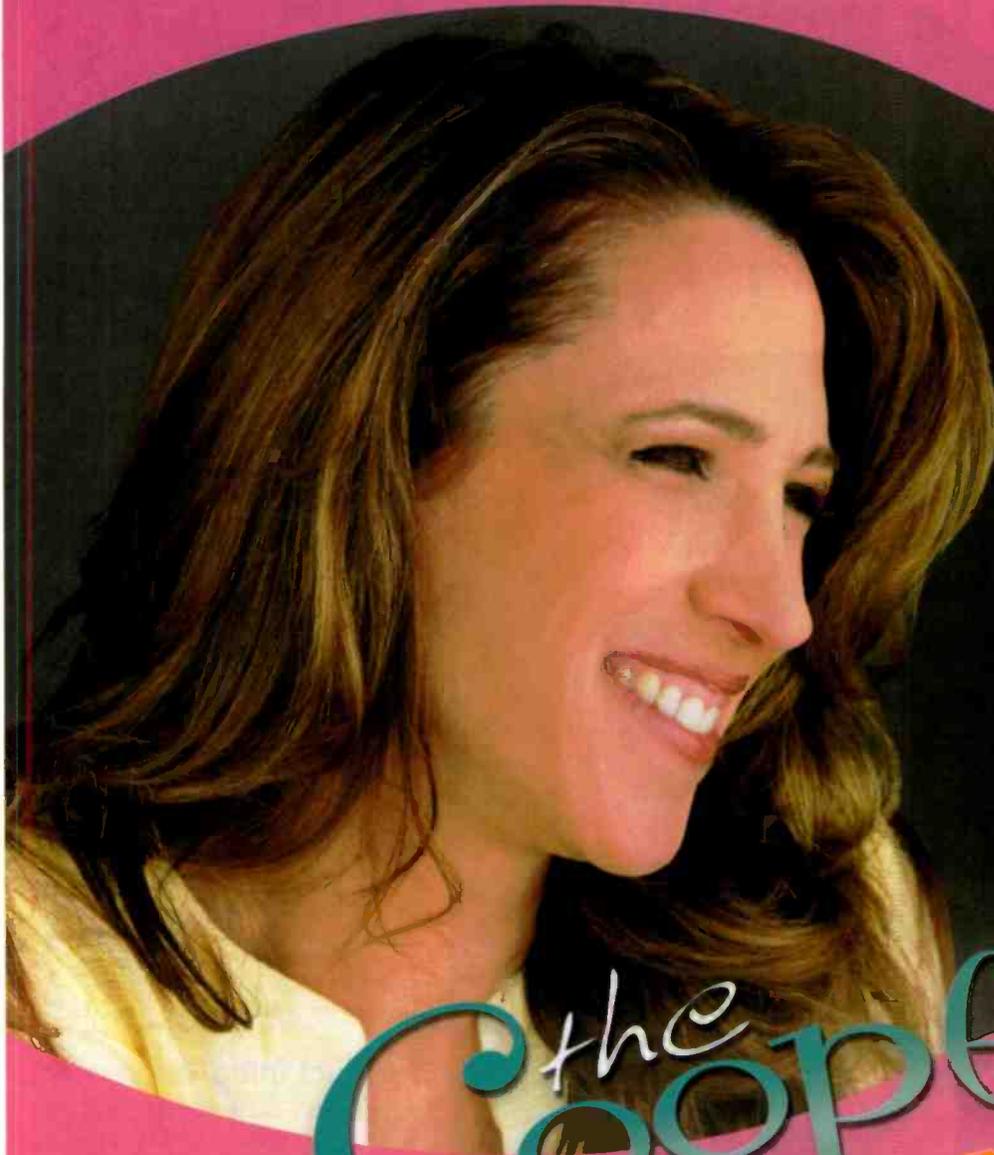
## Dynamic VOD

How will emerging media options like dynamic VOD ad insertion play a role in this upfront? **Michael Bologna**, Mediaedge:cia's Senior Partner, Director Emerging Communications, says dynamic ad insertion within VOD is still very much in the "experiential" phase and will not have a role in this year's upfront. "VOD inventory that is sold by cable networks will be included in the larger deals for major advertisers. Nonlinear VOD (Concert TV, Ripe TV, etc) will play much less of a role as there really isn't any reason to buy it 'upfront.' I think more and more brands will be earmarking dollars for new media platforms but I do not believe the bulk of those dollars will be spent in this upfront but rather over the course of the year. This space changes much too quickly to execute an entire emerging communications strategy a year in advance."

**Bill McOwen**, MPG EVP, Director of Media Investments, agrees: "Given its scale and current application, dynamic VOD should have a place in any local market investment discussion where it's available, but it's a little too early in its life cycle to think they'll get any notice at a national level. However, once they move past the MSO level and form a few network relationships, things could indeed get quite interesting."

Jackson tells us GM will continue experimenting with and learning from the more precise targeting that new technologies are bringing to traditional media: "And with the GM Showroom in VOD, we are uniquely positioned to make the best use of the new ad delivery mechanisms that are being rolled out."

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# Michael Keller on taking the DQ brand and logo to new heights



**Michael Keller**, chief brand officer, is responsible for the marketing, brand, concept and product strategies for American Dairy Queen Corporation. Keller began his career with IDQ in 2001. Prior to that, he worked for Jamba Juice, Inc., Realtor.com, Koo Koo Roo, Nestle Chocolate Co. and Bain & Co.

The famous, red ellipse Dairy Queen logo recently got a new, modern look.

A new master brand logo is being introduced to more than 5,600 locations worldwide. This is the first time in company history that a new logo will be brand-centric for all of the concepts, including DQ Orange Julius locations. Use of the new logo for POP and other collateral materials, television advertising and packaging is slated for a complete rollout by the end of the year.

We asked Keller a bit about the new branding and ongoing efforts at DQ. He explained they are a 67-year old brand with a wonderful amount of heritage and history. "There are a lot of consumer relationships there. We compete in a very modern world against Starbucks and Chipotle and McDonald's and Cold Stone and all the rest and we felt like as we sought to modernize the brand and have been seeking to modernize the brand one of the things we had to do as well was take a close look at our logo which is obviously a key symbol of the brand and modernize it accordingly."

He says DQ's new branding campaign wasn't so much about branding but sustaining their efforts to modernize the brand and in doing so they brought their new logo along for the ride. "We are going to be spending, as we have been for the past several years, a significant percentage of our US Systems discretionary dollars on national cable," Keller explains. "We'll be doing that between March and September, seven consecutive months of national television. Each of those months has a flight of national TV that will carry with it two things, well three things I suppose. One is new product news. The second is a continuation of for us what has been a very effective campaign in terms of what it has done to help build sales, drive traffic for new products as well as build and modernize our brand. So we are sustaining our campaign momentum there. Then third and certainly importantly especially relative to this conversation the national campaign will be carrying with it our new logo as another representation of our movement sort of into the 21<sup>st</sup> Century."

The buy is on 28 to 30 cable networks. "They are all the big usual suspects," says Keller. "There might be a few exclusions based on

a fit with the DQ audience but as an example we're on the Viacom Networks obviously, TNT and TNN. We are on all the Turner Networks. We are very well positioned with ESPN as you might expect given some of our advertising for food is targeted toward the young male. Then we're on some of the other big networks as well whether it A&E or VH1 as two other good examples where we have significant buys."

DQ is introducing numerous new products with this effort. We asked why, and is it unusual in DQ's history? Says Keller: "It is not unusual for the past four years but is unusual given DQ's history. This was a pretty sleepy brand for a very long time and for a couple of decades was doing very little in the marketplace. In the last three or four we have been working very hard to grow this brand, both through same store sales as well as new store development. One of the areas we felt like we had a large number of opportunities in was on the new product front. Whether those were flavor and size extensions off of our current product platforms or they were new product platforms, we felt like we had opportunities to grow our sales through new product introductions. Plus in our business the new product news is constantly refreshing the menu as a way to keep our current customers engaged and possibly attract new customers as well."

## Product integration

What about DQ's product integration strategy? They're cautiously exploring the whole new media world and breaking off into a lot of different digital directions right now. 18 months ago they were on the Apprentice and had a major promotion built around that including an integrated presence in the show as well.

"That did go well for us," recalls Keller. "We haven't seen a similar opportunity since then that seems worthy of the significant investment that tends to come with this. Because we are a large restaurant company we are nearly a three billion dollar brand in North America with 5,500 restaurants but that still does not make us nearly the largest player in the industry and we have to be very smart with our dollars because we don't have the luxury of being able to spread them around to many medium. So we do tend to focus up a bit on national and DMA or market based television as a key driver for getting gross impressions into the marketplace. Which is pretty typical for QSR, it's a heavy, heavy TV spending industry and we're certainly not even close to the top of the industry in terms of media spending." ▶



## DQ franchisees

Keller says their franchisees are as always looking for new product news to keep themselves, their crew and their customers excited and engaged in the brand. "They are looking for great advertising and by great advertising I mean stuff that breaks through and stuff that drives traffic to the store," he explained. "They're very focused right now given the tough winter we've been having and the fact that our industry has been a little soft the past six, nine months ever since really the gas issues of last summer. They are as always looking for traffic and anything that we can do to help drive traffic into their stores is on the top of their list. They are also very consistently looking for more tools to help them run their businesses better—whether those tools involve helping them manage their costs better specifically their cost of goods sold or tools to help them train and retain their crews to help manage that aspect of their business and to keep down those costs."

## Using radio and the internet

How does DQ typically use radio and the Internet? Keller says they're still evolving in both spaces, but for radio it often depends on the market size: "We have not had a run of success that I can point to on the radio side and say that we are a big and growing radio spender. I will say that there are a significant number of markets around the country where we have enough store presence and therefore big enough local budgets to layer up our media mix and be able to compliment our TV creative with radio creative. That happens in probably several dozen markets around the country."

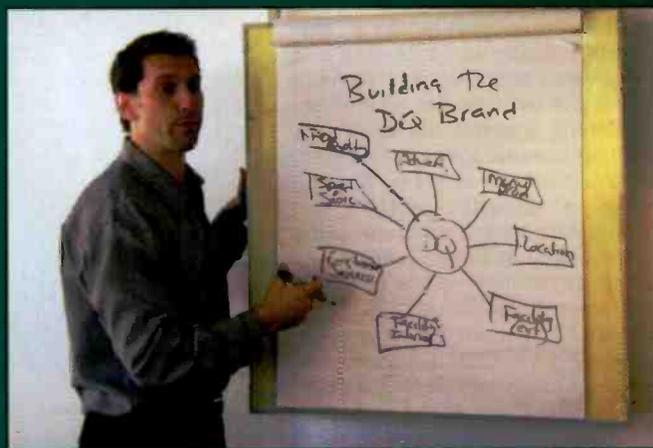
He adds, "We also have some markets around the country that don't have many stores and can't really afford TV other than of course the national TV that runs over their head. So they do tend to choose radio as a medium for generating and impressing their market because they can't afford them through television. As such we do develop a fair amount of radio creative."

DQ produces some 15 to 20 spots a year. They're a 30/30 format, so they produce 30-second spots that can be run independently or pair together as back-to-back 30's. "We just released our '07 campaign which might be our best ever," boasts Keller. "Our franchisee leadership is feeling better about this current creative partly because it's very, very brand centric. It really gets into the whole notion of the smile and story that are so often associated with a DQ experience present and past."

Grey Worldwide is their national AOR. They produce all television creative in all forms and DQ has have a variety of different campaign platforms. They also through their buying arm, MediaCom, DQ's national media agency. DQ also has about 13 regional advertising agencies that buy media locally, traffic creative locally and occasionally develop some promotional creative—either electronic or print—to help drive sales at the local level. Says Keller: "We have a hot new web shop, digital shop, called Space150 here in Minneapolis. It's probably the top shop in Minneapolis and they're sort of leading us into the digital age for a 67 year old brand going digital is not the easiest thing to do. We have started and will be over hauling a couple of our web sites and also starting a variety of new media initiatives to test the waters like so many of our competitors are doing." ■

## What would Keller like to see traditional media—radio and television specifically—provide more of to accomplish his marketing goals?

"On the one hand I'd love to see TV and radio hold on to their audience so that when we spend through those mediums we know we are accumulating a very large number of impressions. So that would be nice if they could hold on. I guess to do that they have to stay fresh and relevant in their own way but specifically for the buying customers like us. It's interesting I would say that when we apply our, when we go to buy and we are applying some of our buying technology so to speak it always feels like we are painting our media buy with a very big brush. It doesn't feel like we have the ability and we work through MediaCom and they are outstanding. It doesn't feel like we have the ability to really target media when you're talking TV and radio in terms of obviously



who is watching or listening to what programs at what times of day and in what kind of way. It feels like in the digital world you can get so much more precise, so much more individual, you can measure so much more against what you are doing then you can in TV and radio. We are going to be able to show our franchisees, which are very important, how various digital efforts that we undertake perform. We can show them literally down to the person how many people view the page, click through a page, click to a link that took them to let's say a store locator, redeemed a coupon you know whatever it might be. There is a fair amount of precision to that. The tricky thing for the digital world is the numbers aren't big yet. It still is not the way most people go about their lives using digital media. It's still very much a TV driven world and especially cable TV with all it's growing. There definitely is a shortcoming on the TV and radio side in terms of your ability to truly target and to micro-target if need be and even build a relationship with your customers. It's very hard to do and I wished there were a way through TV and radio we could be more effective at doing that."

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# Monica Gadsby on taking the reins of SMG Multicultural and the Hispanic media market

Starcom MediaVest Group recently announced the formation of a new unit tasked with oversight of multicultural communication throughout the SMG network. SMG Multicultural is responsible for guiding innovation in SMG's product, driving total holistic integration across platforms and demographics.

With SMG Multicultural comes the simultaneous launch of Forty Two Degrees at MediaVest (MV42), the newest multicultural agency in the network. MV42 is based in New York to work in close alignment with MediaVest, focusing consumer programs on Hispanic, African American, Asian and emerging market strategies.

SMG has the longest legacy of anyone in our industry in addressing and valuing diverse populations, starting in 1987 with the formation of what eventually became arguable the most successful multicultural agency of its kind.

SMG Multicultural is led by **Monica Gadsby**, a 20-year veteran in multicultural media and trailblazer in the space. As CEO of SMG Multicultural, Gadsby is at the helm of the country's leading multicultural division, which will be comprised of three separate agencies, including a special division of GM Planworks, a newly named New York office, and multicultural agency Tapestry.

MV42 shares a majority of its client roster with MediaVest, including Kraft, Masterfoods, Ross Laboratories, Sunny Delight and P&G.

We recently spoke with Monica about her new role. How will SMG Multicultural better serve clients and what's the mission statement? "These two units will work harmoniously with general market counterparts Starcom and MediaVest, respectively, to tailor total market solutions across their distinct client rosters," said Gadsby.

Monica has seen Hispanic media's meteoric rise, along with its evolution into the digital space as of late. We asked about that phenomenon since she co-founded Tapestry. "Hispanic media has grown tremendously since Tapestry's inception in 2001," Gadsby explained. "Though it's still an uphill battle in terms of marketers immediately recognizing the value of Hispanic media, we are definitely seeing it grow at an increasing rate. The most recent, largest area of growth has been in the digital space. Many of our clients have sought our digital expertise to connect with Hispanic consumers who are engaging with social and interactive media more and more."

## No more general market?

What are the top three trends that are important right now in the multicultural media marketplace vs. general market? What should advertisers be aware of? Gadsby was quick to point out, "First, I should clarify one thing: there is no longer a 'general' market. With minority-majority states and a rapidly increasing multicultural population, the face

of new America is changing frequently and dramatically. Marketing today requires a solution-neutral approach to communications planning that's grounded in America's new consumer reality."

The thinking is advertisers need to stop thinking about the media space as two separate silos: general market and multicultural. She explains: "In terms of trends being led by multicultural consumers, the ones that immediately come to mind include: 1) The explosion of digital options and the leading role multicultural consumers are playing in adopting emerging technologies, 2) The immersion of more

content that is geared to multicultural consumers or inspired by a multicultural perspective within traditional media venues – Ugly Betty on ABC is a good example, 3) The continued "ascension" of Spanish-language options within the context of a total market – for example, Spanish-language networks are now measured in the same Nielsen study as the general networks and Univision is consistently the 5<sup>th</sup> ranked viewing option in the country as a whole (often they are #1 or #2 against young demos)."



## The Hispanic media upfront

Any predictions for the Hispanic television broadcast, cable and syndication upfronts? "I think we will continue to see growth with returning advertisers and new advertisers. Expect demand will pace ahead of the market in general as it has in the last few years," notes Gadsby. "This not only is a reflection of continued growth of the Hispanic population in the U.S., but also of the fact that Hispanic dollars are still lagging vis-à-vis the market size and opportunity. On the supply side, I expect we will see continued diversification of assets with more U.S.-based productions, more digital extensions and more opportunities for branded content."

How hot are program integration deals looking for Hispanic media this upfront? Many in the industry say Tapestry invented branded content with properties such as Sabado Gigante still going strong on Univision after more than 15 years. That said, Gadsby says it's fair to say that the Hispanic television market is going through a re-invention process when it comes to branded content, following in the hot trends set by the general networks. "Last year, the Spanish networks offered a record number of branded content opportunities ranging from organic plot lines within Telemundo novelas to Spanish-language versions of the Idol craze, cooking shows, and a primetime program fully focused on beauty (Nuestra Belleza Latina on Univision) to name a few. Advertisers are eagerly embracing these opportunities. I expect we will see more of them in this year's upfront. I also expect that these will become increasingly more multi-platform in nature and that digital extensions including internet and mobile components will continue to multiply." ▶▶

## Commercial minute ratings and Live Plus

Monica tells us she doesn't expect Nielsen's recently-unveiled plan for commercial minute ratings will have an impact on Hispanic upfronts. Why?

"This year will mark the transition from Nielsen's dedicated Hispanic study (NHTI) to the total market unified sample study (NTI). The focus will be in understanding the gap in numbers between the two services if any as well as reassessing the opportunity from a total market perspective (now that general agencies and multicultural agencies will have access to the full picture in one survey)," she explains. "Commercial ratings could become next year's topic. Stay tuned, but for now we have enough of a hurdle with the transition to total market ratings and embracing of the unified study. That said, we will continue to pursue a better understanding of time-delayed viewing just as we will continue to strive for better insights regarding engagement (knowing all TRPs are not created equal) and the impact of interactive components such as digital extensions (via broadband, TiVo showcase or on-demand). This is an exciting time for our industry – a time of change, exploration and learning. We will like explore "test and learn" scenarios as part of the negotiations for the new year."

How will emerging media options like dynamic VOD ad insertion play a role in this upfront? As an industry, Gadsby contends they have not yet figured out how to optimize use of non-traditional formats. That said, they still realize consumers are increasingly turning to these options: "As a consequence, we will continue to explore their viability, as I said, mostly via 'test and learn' scenarios. For the multicultural market specifically, on-demand via broadband in particular is growing very rapidly. We will be including broadband in our negotiations. The biggest challenge at this time is understanding how to evaluate costs vis-à-vis traditional television. Broadband CPMs are relatively very high, though we know engagement is likely also higher."

## The Hispanic Radio Upfront

While most think of the upfront being all about television this time

of year, it turns out the Hispanic Radio Upfront has been taking place as well for a while now. For seven years Univision Radio, for example, on Monday night prior to the television upfronts, hosts a radio upfront concert event in NYC. About 2,000 of the general market and Hispanic buyers and clients that are in town show up. That's up from 500 when it was first organized. Yes, September and October is when the actual renewals are done, but the main upfront presentation takes place in May. The same holds true with SBS, tied in with ABC Radio Networks.

Univision Radio started it when there were no Hispanic radio networks per se. Radio Unica was the only one out there until Univision came along. The Univision Hispanic Radio upfront started as a way to pull some of the talent—the agencies and clients that were in house and in town for the television upfronts—which for Hispanic, most of the clients and the agencies are one in the same. Univision hosts them—and guests get upfront week started in a club atmosphere. Most of the crowd goes back and forth to these two events. Univision arranges transportation—cars and trolleys—to get them there to see both events. Univision says they want to be fair about it with SBS.

How important is the Hispanic Radio upfront now and how much does Tapestry/SMG Multicultural participate? "I tend to think of radio primarily as a local medium and I don't necessarily think of buying radio in the context of an upfront season (though sometimes negotiating for an entire year upfront may lead to better inventory access as well as more advantageous pricing)," Gadsby tells us. "I don't know that we can say there is such thing as a radio upfront market to the degree that one exists on television. That said, in the multicultural space, network radio continues to grow and many sponsorship opportunities are evaluated on a yearly basis. Many, in fact, are synergistic with television offerings and can come into play in the context of multi-platform deals during the upfronts. Univision Radio will be hosting an upfront concert event in NYC as it has in the past three years. I believe they have found the timing to be opportunistic since so many agencies and clients congregate in NYC during that week. It is a fantastic way for them to allow buyers to experience first hand the power of their offering." ■

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## One on One

# Josh Wexler: SWMX CEO

By Carl Marcucci

Josh is CEO, Co-Founder & Director of SoftWave Media Exchange (SWMX), which provides media buyers and broadcasters an efficient, dynamic and transparent electronic open marketplace to buy, sell and manage ad time.

Prior to co-founding SWMX, Wexler was CEO of Zsys Solutions, an IT and software development firm he co-founded to serve organizations across a broad spectrum of industries. Earlier in his career, he was co-founder and Vice President of Hypnotic Hats Ltd., (HYP), a boutique apparel and accessories company that became a global brand within nine months of its founding and was featured extensively in broadcast and print media.

Josh attended Cornell University where, as a four-year starter on the men's basketball team, he was a member of the 1988 Ivy League Championship team and served as Captain for the 1988/1989 season. Additionally, Mr. Wexler was a three-time member of the US Men's Maccabiah Basketball team, winning a gold medal in 1985 and silver medals in 1989 and 1993.

Here, he talks about this critical phase in the industry—moving to e-business—and how SWMX stands out among the crowd of current and emerging providers.

### Q. Tell us about the history of SWMX.

The foundation of the SWMX platform was laid five years ago when an ad agency founded by **Mike Caprio, Jay Keay, and Chuck Omphalius** (former CBS Radio salespeople) approached my partner, **Stavros Aloizos** (SWMX's CTO) and my technology company to automate their back office. We quickly realized that the platform we built could be used by the industry and SWMX was born.

In Dec. 2004, we were in beta with our radio platform on 10 small market Citadel Western Region stations; a region which was run by **Bill Figenshu**—so Fig is the earliest adopter. Our platform from the very beginning provided efficiency and ROI analysis for agencies, advertisers, and media owners, while enabling them to remain in total control of their business objectives.

Those 10 stations grew to 200+ by Dec. 2005; 1,600 by Dec. 2006; and today SWMX Radio is rapidly approaching 2,000 registered stations. Along the way, we have rolled out similar functionality for local cable, and we are currently in beta on local broadcast TV. We are the first and only company facilitating transactions for flighted and remnant inventory across both radio and television. And, now, hundreds of advertisers, a growing numbers of agencies, and political and issue advertisers use SWMX.

### Q. Why do you think CAB dumped eBay's Online Media Exchange?

eBay didn't listen to the marketplace. It's a huge miss given the free pass they were given by the ANA, several major agencies, and the CAB.

### Q. How do you compare and contrast your system with TVB's ePort for television?

There are several distinctions between SWMX and ePort starting with the fact that SWMX is working in the marketplace today. It remains to be seen if ePort can move from an idea to reality.

The scope of what ePort is attempting to create is already a part of what SWMX provides. We provide tools for campaign planning, rate management, creative delivery, posting, and ROI analysis, among other functionality—tools which ePort will not provide.

SWMX is already utilizing AAAA, TVB, and RAB eBiz4Media standards and will continue to do so in the future. The more local broadcasters, agencies, and advertisers adopt these standards, the more they will be able to seamlessly use SWMX.

### Q. What about the television upfront—How can SWMX's system eventually help with the upfront process?

The television upfront is a very efficient marketplace for the biggest networks and biggest advertisers. SWMX can eventually play a role in streamlining the transaction process for the upfront, as well as from both a planning and optimization standpoint. The upfront would be the final frontier for SWMX, and we have a long way to go before we get there.

### Q. What radio station/market coverage do you currently have?

SWMX currently works with nearly 1,900 radio stations in all of the top 50 U.S. markets, according ►►

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to Arbitron, representing an audience of over 12.1 million Average Quarter Hour (AQH) listeners.

**Q. What advertisers are currently using your system?**

The advertisers using our platform range from branded to direct response, as well as political and issue advertisers including AAMCO, White Castle, Wells Fargo, Duane Reade, California Auto Association, Steve & Barry's, Kayak.com, SEIU (Service Employees International Union), and Michigan Chamber of Commerce. We also have tests under way with several of Madison Avenue's best known agencies.

**Q. How do you contrast your system with Google Radio?**

With SWMX, media owners and marketers are in complete control of their business objectives. Media owners have total visibility into every agency and advertiser down to the creative and the rates they accept. Marketers have planning, automation, and reporting tools give them visibility into every level of detail of their campaigns, including exactly where and when their spots run.

Google is running a blind remnant radio inventory auction. On Google, media owners give up control their inventory after closing their commercial logs, Google controls the pricing and who the advertisers are; and advertisers using Google Audio are blind to the specific stations they end up advertising on.

Major agencies and advertisers are not interested in placing their advertising buys in an auction environment where they do not benefit from their buying power. At SWMX, major agencies, advertisers, and media owners are the beneficiaries of the speed and efficiency of our platform with their power firmly intact.

**Q. Tell us about your system for local television and cable. What is the timetable and how many homes are you in so far?**

In July 2006 we beta launched the TV platform serving the local spot cable marketplace. We currently work with many of the largest MSOs in the U.S. delivering advertiser access to approximately 50 of the nation's top DMAs and a potential daily audience of millions, according to Nielsen research. Because we're still in beta on the TV platform, we don't divulge the names of the groups we're working with.

In December 2006, we began beta testing version 2.0 of our television platform which, in addition to local spot cable, now includes access to the local broadcast television market. We've also added enhanced functionality, including: scheduled campaign placement (flighting) capability and true bid/ask pricing in which the buyer and seller can utilize CPM, CPP, and GRP parameters of a campaign through the interface. This provides both parties with the flexibility to come to terms with the primary campaign parameters through the exchange, or contact each other offline to negotiate specific campaign parameters and refine the order on our platform.

To date, we've placed local broadcast business on over 80 stations in many of the nation's top DMAs, including: New York, Boston, Miami, Atlanta and Washington, DC, among others. And with the addition of flighting functionality, we believe we can effectively deliver advertiser access to any local broadcast TV station in the U.S.

**Q. What can it do for local television and cable buys?**

Our primary objective across all platforms is to streamline the

process for media owners and buyers. Unlike other electronic ad services that have emerged, we're not trying to change the way the industry does business with auctions or black boxes. We're simply working to enable buyers and seller to do exactly what they do today with greater speed, efficiency and control while automating many of the more laborious administrative processes that currently exist and facilitating a more seamless data flow among participants. The ultimate goal of the exchange is to help buyers and sellers to be more profitable and productive by handling much of the heavy lifting in terms of data management and integration, analytics, campaign optimization and the like. At no point will we ever seek to disintermediate the relationships that exist between buyers and sellers. We're simply trying to help each of them achieve their respective business objectives more quickly and easily so they can spend more time focusing on strategy and building relationships that pay dividends. ■

## Benefits of the Softwave system

**Control:** In every case, SWMX clients know exactly what inventory is being bought or sold, at what price, at what time, and remain in full control of the terms of every transaction that is executed through the system.

**Bid/Ask Pricing:** SWMX Television is the first and only true bid/ask marketplace in which pricing is determined by the buyer and seller equally based on supply and demand and what the marketplace will support.

**Flighting Capability:** SWMX is the first and only electronic marketplace that can facilitate flighted campaigns in both radio and television.

**Political Functionality:** SWMX is the first and only electronic marketplace to support political and issue-based advertising.

**Serve the Broadcaster and Advertiser Equally:** Architected by CTO **Stavros Aloizos**, the SWMX marketplace is the only exchange that is able to manage the inherent complexity of integrating and assimilating the many data formats necessary to meet the needs of broadcasters and marketers equally.

**Enable Clients to Do Business on their Terms:** SWMX says it's not trying to change the way the industry does business with auctions or black boxes. Their goal is to help clients do exactly what they do now with greater efficiency, control, precision and ultimately, ROI and profitability.

**Respect the Relationship:** SWMX says they understand that the buyer / seller relationship is fundamental to the media process. The goal is to help buyers and sellers approach each transaction with a clear understanding of each other's objectives and provide the tools to help them execute more efficiently, productively, and profitably.



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# On the right track: Call tracking separates broadcasters from the competition

The competition for advertising dollars is fierce. In addition to traditional methods ranging from direct mail to print advertising to over-the-air campaigns on radio and television, ad dollars are now directed to online media like sponsored links, Internet display ads, classifieds, banners and email campaigns.

One way broadcast entities can ensure they garner their share of advertising budgets is by demonstrating the effectiveness of television and radio advertising. But how? The answer lies in a methodology that underlies the appeal of Internet advertising. Online ad space offers a proof-positive method of tracking ad effectiveness immediately with each "click thru." With each mouse click, web events and transactions are easily measured, demonstrating advertising effectiveness. This is the appeal of online media, embodied in the successes of Google and Yahoo.

How can traditional media companies measure and track responses in the offline media world? Can response phone calls be tracked as easily as a mouse click? It's traditionally been laborious and tedious work, requiring a major investment in sophisticated hardware and software or expensive outsourcing to a call center. But new call tracking technologies — in which companies lease direct response telephone numbers to media outlets for use in ads — offer broadcasters the same accurate and informed customer tracking that Internet entities have at their disposal in real time and on the web. Broadcasters using such systems offer significantly more benefits to their advertisers than their competitors.

## New call tracking technology – what is it?

The key to call tracking technology is specifically-assigned response phone numbers, unique to each advertisement or campaign. Using this technology, broadcasters provide dedicated toll-free or local telephone numbers for each advertising spot. Calls route through a server and ring to any existing phone line the advertiser chooses. Calls pass seamlessly, without delay and without the knowledge of the caller or customer.

Valuable information is captured about every call to the client, including lead source, call result (answered, ring-no-answer, busy) and duration, and caller's phone number, name and address. (Don't assume that call tracking solutions cannot capture data for callers who block caller ID. Every call coming through a toll-free number must be exposed to the call receiver. Since they are paying for the call, they are entitled to know where it came from.)

Calls can be digitally recorded, attached to the call detail and easily accessed and listened to online. On behalf of their clients, broadcasters can access activity reports by logging in with any web browser. They can access various reports and use filters to zoom in on campaigns, time periods or media of particular interest. Call-activity reports and missed-call alerts may be scheduled then emailed to themselves or clients to establish recurring proof of performance. Broadcasters can also allow clients to access reports themselves.

## One word of caution

Advertisers run campaigns with different goals. Branding campaigns seek to build name and product awareness. Direct response ads trigger an action by the consumer. Call tracking software is not useful as a tool in building brand awareness. The technology is only effective with a (phone) call to action.

CALLSOURCE Reporting										
Call Details Premier Funding Group run by John Smith at 1:20:11 PM - 01/08/2007 PDT										
Refresh EXCEL Print Close										
Total Number of Calls*										Average Duration
540										02:09:15
Index	Date	Employee Code	Day	Time	Location	Ad Source	Result	Duration	Status	Caller Number Target Number
905569 oelaca	04/04/2006		Sun	8:22 am	Premier Funding Group	Company Website	C	0:03:58	Reviewed Gate	<u>(213) 555-2481</u> (323) 555-7384
900287 oelaca	04/04/2006		Sun	8:10 am	Premier Funding Group	KWKW Radio		0:00:00		(310) 555-5478 (323) 555-5478
905570 oelaca	04/04/2006	Jim Smith	Sun	9:11 am	Premier Funding Group	KTLA TV	C	0:02:40	Reviewed Gate Closed	<u>(818) 555-9616</u> (818) 555-7384
900288 oelaca	04/04/2006		Sun	8:23 am	Premier Funding Group	Yakupak Coupon Mailer		0:00:00		<u>(310) 555-9616</u> (310) 555-7384
905571 oelaca	04/04/2006		Sun	9:32 am	Premier Funding Group	Holiday Weekend Mailer		0:00:00		<u>(310) 555-9616</u> (310) 555-9674
905572 oelaca	04/04/2006	Jaime Casillo	Sun	1:17 pm	Premier Funding Group	KROQ Newradio	C	0:04:00	Reviewed Vendor	<u>(310) 555-7206</u> (323) 555-7384
905573 oelaca	04/04/2006		Sun	1:34 pm	Premier Funding Group	LA Times Display	CW	0:04:28	Reviewed Gate Closed	(310) 555-0038 (310) 555-5484
905575 oelaca	04/04/2006	5435890	Sun	2:12 pm	Premier Funding Group	Metro Yellow Pages	MT	0:06:00		<u>(310) 555-3416</u> (310) 555-5489 <u>(310) 555-3418</u> (310) 555-1123
905577 oelaca	04/04/2006	Jill Lindberg	Sun	3:16 pm	Premier Funding Group	Orange County Registrar	CT	0:00:00		<u>(323) 555-8007</u> (323) 555-3454

Explanation of Call Results:

- C Connect: the call to the office was completed successfully.
- B Busy: a busy signal was encountered while trying to connect to the office.
- N No Answer: an attempt was made to connect to the office, but the call was not answered.
- A Abandoned: the caller hung up before the call was answered.
- E Extension Routing: Call was routed to a supplementary number based on an extension entered by the caller.
- T Time of Day routing: Call went to an alternate number because of Time of Day routing.
- O Overflow routing: Missed call to an alternate number because of Overflow routing.
- W CallMeNow: The call was made to the customer in response to a web-based CallMeNow request.
- 🔍 Link to CallReview Call Audio
- 📧 Link to Voicemail Message Audio
- 📅 Link to Audio Journal entry
- 👤 Link to Update Employee Code
- \* Caller numbers shown as bold underlined link to MailMaster report. Click to view caller details.

## The benefits of call tracking technology

There are three primary benefits for broadcasters using call tracking services for their advertisers. They are client retention, the ability to attract new clients and key advertiser data capture which allows sales managers and their teams to act as advertising consultants instead of just sales persons.

### 1. Client retention

Everyone in sales understands the amount of time, money and commitment invested in creating a client relationship. Once established, it's essential that the relationship be maintained and built upon. No one wants to see their "book" move advertising dollars to other venues.

Broadcasters offering call-tracking technology give their clients more value adds than competitors who don't. Broadcasters tracking calls can identify which ads are working and which aren't — in real time. Most importantly, they are able to accurately quantify a client's return on investment (ROI) for each advertising dollar spent. Consider the following example:

Recently, a well-known provider of private jet services questioned a series of ads they were running offering corporate jet use for a minimum of \$250,000. Unhappy with the results, they complained to the media outlet and threatened to cancel the campaign. Immediately, results were pulled and they demonstrated that the ads had generated phone inquiries. The reports also showed buyer's names — the company then realized the ads had actually created sales attributed to other sources. Instead of cancelling, the campaign was renewed.

Call tracking technology also aids in client retention by putting another arrow in the quiver of a salesperson. **Kathi Moore** is president of The Xcel Group, Inc. a leading seller of direct-response advertising based in Irvine, California. Her company does a great deal of business in the ▶

highly-competitive mortgage industry. She relates the following:

"One of my mortgage clients told me that 70% of his business was coming through business or Internet referrals. He said that his broadcast ads were 'ineffective.' But once we started incorporating 800-numbers and tracked his calls, we found that 65-70% of his business was generated by broadcast advertising – exactly the opposite of what he thought."

"Nothing is more important to advertisers than understanding where customers are coming from," Moore continued. "And once they identify which ads are effective, they choose to buy more of that type."

Tracking technology levels the playing field. It puts the data in the hands of the sales manager and his sales force. Before, clients had the data, or better said, only the client *thought* they had the data. Call tracking technology completely alters the perception and the reality of campaign results.

## A note about accuracy

Tracking an advertising campaign and tracking it accurately are two different things. Most companies attempt to track advertising, but do so ineffectively. Typically, a receptionist or salesperson fields an incoming call inquiry: "How did you hear about our company" or "Where did you see our ad?" Many callers don't remember, they've jotted down a number and forgotten where they heard it. So, the receptionist asks a leading question such as "Did you see a commercial while watching the local news?" the caller agrees and misleading information becomes part of the permanent record. The inaccurate variations are endless, particularly when the call recipient forgets to ask the appropriate questions or writes answers down wrong.

## 2. Attracting new clients

Call tracking is crucial to demonstrating return on investment (ROI). The ability to test new campaigns and demonstrate effectiveness is crucial to media reps hoping to land new business.

**Chris Consorte** is CEO of Integrated Direct and adjunct professor of Marketing and Management at Long Island University, Fashion Institute of Technology, Mercy and Baruch Colleges. Integrated Direct's focuses on direct response and lead generation, utilizing television and radio and other forms of direct action marketing. He says, "The best thing about call track-

ing is knowing exactly what each ad is doing, knowing the return on investment for every dollar spent."

The ability to accurately demonstrate the effectiveness of ad campaigns allows local broadcasters to start small with new clients. Instead of initial buys costing hundreds of thousands of dollars for a six-month campaign, users of tracking software offer new clients a 30, 60, or 90 day test campaign – complete with local numbers, toll-free and vanity numbers – then refine the campaign as the data reveals what works and what doesn't. Once what works is established, new clients are more apt to re-invest. "There's definitely some uncertainty when starting a new campaign," Consorte said. "But when we show our clients the rate of return on their investment, it's a real eye-opener."

## 3 – Sales team as consultants

Armed with the detailed and accurate analytics that tracking software generates, account executives build rapport and become proactive, transforming from salesman to consultant — guiding clients towards broadcast advertising that is most effective. They can even compare and contrast the performance of broadcast advertising with print or online ads the client is running.

According to **Mark Powers**, president of CallSource, a company that developed and now provides call tracking technology to radio and television broadcasters, "Our clients (who offer call tracking to their clients) tell us their reps are offering a more compelling pitch than the competition. They are not just selling 'spots and dots' like the next guy. After the sale, media reps are sitting down and saying 'Let's look at the results together, let's see how many calls came in and how the calls were handled.'" The ability to provide both statistical and qualitative analysis moves the salesperson beyond the sale, enabling them to provide service that goes straight to their client's bottom line.

In the high-stakes battle for ad dollars, radio and television broadcasters are not only in competition with each other, but also with traditional print mediums and measurable online media. Broadcasters utilizing call-tracking technology have a competitive advantage in regards to those who do not, by validating the efficacy of their ads, by offering new (and existing) clients more creative solutions and empowering sales staff to go beyond selling and into an advisory role. More importantly, call tracking technology offers broadcasters the ability to level the competitive media-spend playing field; by offering advertisers with the measurability and accountability they seek today. ■

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## The Conexion Thalia Radio Show

ABC Radio Networks and Latin superstar Thalia got together in March to launch "The Conexion Thalia Radio Show, a two-hour weekly radio program via ABC Radio Networks en Espanol. The show features a fun and fast-paced lifestyle show in a format that allows Thalia to expound on fashion, gossip, and inside celebrity information as well as include informative segments on issues facing Latinos today. She covers all the topics that appeal to an extremely wide demographic of 18-34 year old male and female Latinos and lovers of the culture.

Thalia began her career as a child star on Mexican television and in Mexican theatre. As a recording artist for EMI Music she has achieved superstar status, sold over 12 million CDs worldwide and been nominated for four Latin Grammy awards. She has had twelve Top 10 singles, four of which went to number one.

We asked Thalia about her show—the theme, the content and the spirit. "It's a music radio show and a lifestyle show. You can talk about fashion, you can talk about what's in; you can talk about celebrities. You can talk about everything but my main concern was to give back to the community. I really use this as a platform to help my community, to communicate with them about how to get ahead in this country, how to help them save their money.

The team we put together is great. We just want to help everyone and have a good time on the radio and to take advantage of the two hours we have every week. It's just one of those things that I never expected and I've been doing radio since I started my career. There's something about just sitting in front of a microphone that allows you to talk everything out. It's not like a camera that is on and you have to kind of like be aware of the light and of the make-up and the hair etc., just be you. This is so real, so raw and so incredible—I'm enjoying it."

### Working with advertisers

We asked Thalia about some of the show's marketing relationships with Pontiac, Amtrak and others. How does she work with advertisers to make them happy, what sort of things does she offer them when then sign up with the show?

"I offer them my entire platform, all the people the base that I have of all the people that have been with me for so long and they know the value of that," she explained. "I offer them a very positive influence in the Latin community. It's incredible what is happening right now. It's like everybody finally is turning their heads to the Hispanic market. They better get involved and they better know how to, because sometimes they are just trying to approach the Latin market with stereotypes—you know like mariachis and the girls dressing in red with flowers in their hair and the Yo Quiero



Taco Bell Chihuahua dog...so stereotypical."

She adds, "We're not the stereotype, you know? We're a different culture but we have so many other things that we like. We're trying to tell the advertisers that and we know our market. We know how to reach them and how to offer them the best. People like Pontiac and Amtrak are feeling very comfortable with our approach to our community."

So you really give them some help in how they should market their products? "Well it's like we know it—I'm born in it, I'm part of it and it's so simple for me to digest it and understand it," she says. "But they are also very excited let me tell you. They are very excited about reaching this market in a different angle."

### Latino vs. general market radio listeners

How does Thalia describe Latino/Latina radio listeners vs. general market listeners? Is there a difference with loyalty and passion? "Of course we're more passionate but also we are lighter," she explains. "We don't want to talk about very, very formal things and have serious debates. We talk about that in a way that is light but it's fast and easy. 'Okay, that's cleared, next, what's next?' That's what we know about how to talk to them. In immigration ▶▶

aspects and in everything that we portray in the show like the economy or how to get your health insurance, etc., we talk about it lightly but clear and in a fun and light way for them. Sometimes the English-speaking talk hosts are little too formal and a little like a debate—it has to be life or death.”

### Working with affiliates

We asked how Thalia worked with the agencies, but how does she work with affiliates that carry her show? Are you willing to do liners? Are you willing to go down and stop at the station and meet listeners if they set up something? “Oh yeah, like in the future, as an example I’m going to LA or I’m going to Chicago and I would like to do a live radio show from one of the affiliates. Maybe I can take over the parking lot or take over a nice restaurant over there and just make it happen and make a nice party outdoor with the audience. I’m just starting and I’m just trying to make people fall in love with the show. We are having a great reaction right now. In the future we would like to do that, like live from South Beach for instance or Times Square.”

How many stations are currently on board? What markets? So far, she’s got big markets including Los Angeles, Chicago, Miami, San Francisco, New York, Puerto Rico and more. “Also, what is happening is another factor with all the followers, all the fans around the world that are connected to the show. We launched the website ThaliaRadio.com and we have fans from Budapest, Greece, Turkey, Brazil, Argentina, Philippines, Mexico and they are tuning to the radio show and it’s so crazy. I love it because they have

different points of view and they want to be part of the show. It’s very cool probably one day we will want to do it simultaneously with the cameras and live from the studio.”

### Performing at Univision’s upfront celebration

Thalia performed at Univision’s Radio Upfront Celebration in New York last year. What does she think about the Hispanic radio upfront event? Do you think it’s important to have that entertainment and that big presentation? How do you think that helps with business with the advertisers and the agencies that they invite to that event every year? “Oh I think it’s great. It is something that has been going for so many years—not just here in the United States but I started doing that in Mexico with the big monster over there that is Televisa. Every year they have this affair, a dinner for the publicists and they put the shows together and they make incredible displays of the acts and everything. They love it, it’s like an opportunity for them to get together, to be part of the new project for the next year, to hear what is coming up and to get excited and hear the plans of the vision of the future.” ■

## Multicultural radio and ABC

by **Carey Davis**, VP/Multicultural Advertising Sales, ABC Radio Networks

Multicultural radio is different from general market because it does not just program around a format. Urban and Spanish language radio is about community serving as both a lifeline and a beacon to listeners. This translates into dedicated, (brand) loyal, responsive listeners who are P1’s for their respective stations. As we see a growth in the minority populations with burgeoning population growths in Los Angeles, New York and in a wide swath of other markets, the majority of listening is to stations which are Urban or Spanish—a majority! These listeners have significant purchasing power and influence on pop culture and radio has become a large part of their consumption habits.

African Americans and Hispanics love radio. This uncomplicated, friendly machine connects with people in the bedroom, bathroom, kitchen and car—to the hearts and minds of tens of millions of people each week. This is accomplished each time by relevancy and familiarity in song and word.

It is said that Spanish is a language which better expresses emotion than English does. Radio is a personal medium while internet and newspaper reflect information or TV as a “group” medium. What you achieve with Spanish language radio is the community connection—in language—in a very personal way.

The recent RAEL (Radio Ad Effectiveness Lab) study for multicultural marketers clearly shows how Radio scores highest with African-Americans in each category of how people feel connected — “Helps overcome hardships, Have a good time, Comforts you, Makes you relax.” In their hearts and minds, consumers feel a deep connection with radio.

In the early days of Multicultural broadcasting, the Urban or Spanish language stations would position itself as “all things to all people.” Today, with two Urban stations in a market or a second station flipping to Spanish we see new targets and new advertising options. Importantly, audiences are not “cut in half” when a new station signs on — the market grows.

At ABC Radio Networks, we combine top stars with compelling shows to effectively communicate with coveted multicultural audiences. We often say “exposure is not synonymous with communication.” In our Urban and Hispanic divisions, we focus on two critical elements of radio — science and art. The science is RADAR. The art is the special connection listeners have with mega-talents such as **Tom Joyner** or **Michael Baisden** on our Urban side and the stellar commercial clearances on our affiliates working with the star-power we deliver with **Daddy Yankee** or **Thalia** on the Hispanic front.

Science and art bring out the best of radio—and that’s what ABC Radio provides our advertising partners.

## Tommy Mottola comments on the show

“This national radio show gives Thalia another platform to share her unlimited talent and creativity with millions of fans and listeners,” said **Tommy Mottola**, founder of The Mottola Company and Thalia’s husband. “The whole idea came from an opportunity to create something that is unique to the market. If you followed my career you know that I try to do things that stand out. We were wondering what we can do that will be different, that



would make a difference. We really wanted to appeal to a wide range of audience like Thalia does. So we thought about this and this was the greatest opportunity. There is not a product in the marketplace like this. I think the uniqueness of that is what provoked us to really do this.”

It sounds like she’s having a blast! “Oh she’s having the best time of

her life,” Mottola adds. “It’s really a great lifestyle show encompassing fashion, beauty, celebrity, movies, music, cutting edge on all the entertainment fronts. But also getting into all these empowerment and opportunities and issues concerning immigration and health insurance—all the things that are facing the Latino community. If you know anything about the community at all the only thing that matters there is one word it’s “Trust”. Thalia has that with that community.”

## ION's "OMVION" mobile unit gaining ground

ION Media Networks' new Open Mobile Ventures Corporation (OMVION) is a business unit dedicated to the research and development of portable, mobile and out-of-home transmission technology utilizing over-the-air digital television spectrum.

OMVION offers a vehicle for like-minded broadcasters to align R&D efforts in the advancement and standardization of TV spectrum-driven mobile applications with much higher bandwidth. ION Media recently initiated the formation of an Open Mobile Video Coalition, an association of leading broadcasters that are committed to driving the development of mobile digital broadcast television. The Coalition consists of broadcasters that include Belo, Fox Television Stations, Gannett, Gray TV, ION Media, the NBC & Telemundo TV Stations, Sinclair and Tribune.

OMVION is establishing three mobile DTV test centers in New York City, Tampa and Washington, D.C. for prototyping and development of mobile DTV and single frequency distributed networking technologies.

SmartMedia spoke with ION Media President and CEO **Brandon Burgess** and **David Glenn**, ION's President of Engineering.

### The overview

Glenn tells us OMVION has started to draw the attention of other industry companies as well as broadcasters. "Broadcasters are looking for business opportunities for television to become mobile as opposed to strictly an in-home theater environment. As you know the rest of the world is beginning to explore this, and it is spreading fairly quickly with video to other devices such as in cars. We have done some research and it's surprising the number of video displays being incorporated into mobile vehicles, trains and buses, etc. That's a first step, with the PDA cellular phone type devices coming right behind. We had been interested in mobile video distribution and looking for opportunities to monetize some of the spectrum. After several phone calls from a multiple of venture capitalists and a couple of meetings, it was actually Brandon's idea to launch OMVION. We'd already been talking with some of the manufacturers, but launching OMVION was a way for us to get the ball rolling. Subsequently, we learned that one of the primary venture capitalists that we've been dealing with has been selected by Samsung to be the tuner chip manufacturer for their mobile handheld de-

vices. So this is becoming a very good opportunity for broadcasters, and we have several station group owners and one TV network that agree with us."

OMVION will work with other broadcasters and manufacturer to allow content of any type to be distributed to stationary or mobile devices from pedestrian speeds of a couple mph up to high speeds in excess of 70 mph. You can deliver any content—video, audio, Internet content, stock exchange information, etc.

What are you offering to local broadcasters, existing carriers and equipment manufacturers? "It has to be a collective effort in our opinion," says Glenn. "We're not trying to sell devices. They are not going to be coming to us looking for devices. We want the carriers, the CE manufacturers and the content providers to all collectively work together on this and agree to pursue the business opportunities that are out there."

### New chip needed

The new technology will require a new chip to be installed in handheld devices that will receive the spectrum or frequencies needed to carry the over-the-air content. The good news is the infrastructure is already built. Broadcasters already have the towers and the delivery systems in place. "It's a minimal change to your broadcast plan to be able to incorporate the data that is capable of being received in the mobile and handheld environment," explained Glenn. "The turnaround time for a typical cellular device is about 18-months. Most of the new devices that are coming out now already have displays built in them in one form or another. All we need are the receiver and the decoder which can be one chip or two separate chips that are very small low-power consumption devices incorporated into these displays or handsets."

So that's actually a big leap. "It actually is and it's moving things in the right direction," says Glenn. "In addition to the Samsung, I'm sure you're aware of the LG-Harris initiative where they have their own technology that they haven't released a lot of information about. OMVION and a lot of the other broadcasters are hoping they could find a way to work together and utilize the technologies that they have and build it into one system as opposed to two separate systems. That would move things along much quicker because they're big powerhouses when it comes to consumer devices."

### It's the network...

ION is planning on putting a system on as many of its own broadcast towers around the country as it can, using its own spectrum. But to make it successful, market-wide, other sta-

tions' towers will likely be needed as well, creating a network similar to cellular coverage, so to speak.

"Exactly," explains Glenn. "And that's one of the concepts that we have been talking about to other broadcasters who are very receptive to it. It's easy to do a cellular type network. The technology is already there. ▶▶"



Brandon Burgess



David Glenn

We just need to incorporate it. We feel there is an average of 30 megabits of data available within each market that the broadcasters currently own and are not utilizing to their potential. Even groups that want to use the full 19.4 megabits of their data stream for the home theater environment will have the opportunity to go to other local broadcasters within the market that don't have the HD content to put on their digital stream. They have a lot of excess capacity. They can make joint service agreements with them or carriage agreement and actually utilize somebody else's spectrum to put their programming on. This seems to have peaked some interest."

## More robust?

What about OMVION's broadband capability as far as throughput versus established broadband networks? What about the cost differential and actual ability to carry more content at faster speeds? Is that one of the biggest selling points?

"Yes and yes," claims Burgess. "One of the benefits is that there is already a lot of infrastructure in place. Really 90% of the infrastructure that is needed to provide pretty much nationwide coverage by broadcasters is already in place as we sit here today. There are some very tiny things that in theory would have to be developed at the local station from a transmission standpoint to enable the mobile transmission. Then obviously there is a lot of development work that has to happen at the receiver side, at the device side. That is the real benefit. In other words if you start up a completely new system such as the satellite radio companies have very painfully had to experience and as Qualcomm is going at a carefully very painfully going to experience when you have to put out two, three billion dollars to build infrastructure that puts a huge burden on the business plan. One of the benefits is that the infrastructure is largely there on the transmission side. The spectrum therefore is very efficient and very inexpensive to operate. The incremental cost is very modest and there is a lot of capacity available—not necessarily for individual broadcasters but if a couple of like minor broadcasters get together and pool unused spectrum. Even though it may be on different frequencies, most of it is going to be UHF bands and the receivers would have to be built such that it can seamlessly detect various UHF frequencies within the market."

The advantage truly is a stronger more robust signal with higher throughput. More broadband capabilities; faster download speeds that sort of a thing. Is that really one of the biggest selling points that you're offering? "Yes, at a much lower cost," says Burgess.

## Working with existing carriers

Is OMVION aiming to set up a whole new Sprint or Verizon Broadband Service? No, they see themselves as a much better service provider to distribute video for them. Why? They don't have the capacity to take it to the next level via cell towers, explains Burgess: "If you, Dave and I had a phone and we were all standing near the local cell here and we would all watch video on our phone, we'd shut down the cell because they don't have enough capacity."

So this totally changes it?

"It totally changes it because the way the carriers make their money is off of point-to-point voice communication, Burgess added. "That's so they can charge you fifty cents a minute and that's where they make money. If they allocate bandwidth to put through video for which no one is paying a sub fee it's not going to be economic for them. We have a whole analysis on that where it costs cellular carriers something like billions of dollars okay for that zip code to deliver one hour of video." ▶▶

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According to the research that their consultant, did the cellular ROI for their bandwidth for an hour of programming at a \$10.00 charge per film is the return is four cents. Making four cents off of consuming that bandwidth as opposed to what they would make off of text message and over cellular service.

## Revenue estimates

What about revenue and subscriber estimates? Have you protracted out that far about any estimates for say a local broadcaster? Says Burgess: "This is in an early strategic planning phase. We have not gone into market-by-market business plans. We're trying to put a prospect out there for how big the market could be once we solve the technology issue. The numbers we come up with depend on which mobile universe we think we'll be ultimately able to reach which, in turn, is a function of what your technology solution is going to be. You can only make definitive business plans once you know what the addressable universe of devices is going to come out of the technology solution. The big dividing line between those devices is going to be which have large built in power sources versus which devices are battery driven. Battery life is going to be a factor; power consumption is going to be a factor."

Ultimately the question is going to be how far up the food chain are you going to be able to go on a mobile basis when technology shakes out. Are you going to be able to reach every single cell phone? Then you've gotten 100% of the addressable market, which is a huge number of devices. I think we came up with something like 300 or 400 million dollars of potentially addressable universe when you include the cars and all the phones and all the mobile devices. If you are limited, either because of reach or power consumption, those sorts of things, you may only get the vehicles and the laptops and all those devices with a higher battery capacity.

We think either way even if you just get the basic addressable universe the revenue potential is in the billions of dollars as opposed to the hundreds of millions of dollars over time. If you get to the full universe, meaning including mobile devices, it's probably in the mid single digit billions of revenue. We assume that that would be composed of a sizable portion of advertising revenue and some portion of subscription."

## ION Media station participation

What about the rollout plans for your own transmitters? Have you planned to have just about every ION television having this capability within say one to three years? I know you're rolling it now for broadcasters, but for your own stations what are the plans?

"For our own stations the plan first has to be the industry rallied around this idea so we can standardize the technology," says Burgess. "So the real question you're asking is when do we think the technology will be ready? And I would say a one to two year timeframe would be our hope. Once the technology is available and if and only if the industry is adopting it, then we would assume that we would have the capability in all of our markets. I would be a little more skeptical if the industry as a whole did not come together on it because I'm not so sure that any one or two companies alone can build a robust system around this idea."

A good thing for OMVION is the forced move to digital and UHF spectrum in 2009 is those frequencies are much better for the system to work well than VHF. The higher UHF frequencies punch through buildings and other ground clutter better than VHF spectrum.

## In cars and trucks

What's really going to be key is when the automakers roll out IP addresses in every vehicle. Ford's new F-150 Truck has an IP ad-



The Omvision signal testing vehicle

dress with a computer screen that can stream audio and video and access the internet completely.

"Well we see the auto industry potentially as one of our earlier partners," explains Burgess. "You know once the technologies were to come around, auto is a great device for this. Some of the coalition members are talking with them. We haven't personally geared up on that front, but that's just been a resource issue and clearly a discussion we need to have."

This isn't all about ION making money. It's about everybody making money and doing something that needs to be done in the industry. Something like this needs to be done to really bring video content delivery to the next level where it can be better monetized.

Burgess concludes, "Yes, well this is one of those where all ships rise with the tide and if you fight it you're not going to get there. So we really think the industry has to come together on this one." ■

## Two words: Clear Channel

The slide in trading continued big time in Q4. Look back to Q4 2005, when total value amounted to \$3.365B. That was followed by quarterly totals of about \$3.28B Q1 2006, \$2.15B Q2, and \$2.08B Q3, and finally settling in Q4 under \$1B, at about \$917M. But these totals omit two deals. Just two. Add in the \$13.7B spent on Univision in a Q3 deal and \$17B spent on Clear Channel in Q4, and the picture is wildly different. Univision alone eclipses RBR's total trading tally for 2004 and 2005 combined: \$4.6B in 2004 and \$7.36B in 2005. Without Univision and Clear Channel, trading increased in 2006 to about \$8.23B; with those two added in, it skyrocketed to \$38.93B. Of course, it remains to be seen if that much money will actually be spent as intended. The Univision deal closed just this past March, but the fate of the Clear Channel deal still hangs in the balance and the prospects are shaky.

### Station trading

Quarter	Deals	AMs	FMs	TVs	Value
Q1 2006	139	105	121	10	\$3,282,445,811
Q2 2006	144	93	132	33	\$2,150,615,819
Q3 2006	136	94	183	96	\$15,579,141,844
Q4 2006	124	427	922	53	\$17,916,942,672
2006	543	719	1,358	192	\$38,929,146,146

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### Clear Channel puts its stamp everywhere

The major effect of the Clear Channel deal was to produce astronomical station totals in all market size categories. Clear Channel is exceptionally well represented in the top markets, and is also exceptionally well represented in the 100+ range, accounting for the huge bulge apparent there in both the quarterly and full year totals. Clear Channel's presence outside rated territory exists but is not as methodically inclusive as its rated holdings, so unrated stations sold in Q4 produces a higher straight count but a smaller proportion of total stations sold than has been the recent trend. Many of those CCU stations either have or will be resold, regardless of the fate of the overall CCU sale.

### Quarterly station trading by market size

Quarter	Total Stns	Mkts 1-50	Mkts 51-100	Mkts >100	Unrated Mkts
Q1 2006	236	56	27	63	90
Q2 2006	258	32	30	97	99
Q3 2006	373	144	62	97	70
Q4 2006	1,402	332	267	647	156
2006	2,269	564	386	904	415

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### Radio trading minus CCU halved in Q4

Actually, it was halved and then some. In Q3, taking out Univision, total trading managed to get over the \$1B mark. In Q4, subtracting Clear Channel, it didn't quite get to \$480M. Again, much of cash attributed to the Clear Channel group sale will reappear as resold property throughout 2007. Some of that inventory, which includes hundreds of properties in smaller markets and ungrandfathered spin-offs in larger markets, has already been spoken for.

### Radio only transactions

Quarter	Deals	Stns	Value
Q1 2006	129	226	\$3,103,495,811
Q2 2006	126	225	\$358,665,819
Q3 2006	112	277	\$4,351,951,344
Q4 2006	118	1,349	\$16,479,813,432
2006	485	2,077	\$24,293,926,406

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### Trading in TV still percolating

A lot of television trading was kept on hold in recent years due to regulatory uncertainty. Now that regulatory uncertainty has achieved the status of a certainty in its own right, deals are again taking place, and that trend continued throughout the year. The \$10.4B value placed on Univision properties created the 2006 bulge. Otherwise, the year was roughly comparable to 2004's \$2.14B TV total and 2005's \$3.02B.

### TV only transactions

Quarter	Deals	Stns	Value
Q1 2006	10	10	\$178,950,000
Q2 2006	18	33	\$1,791,950,000
Q3 2006	24	96	\$11,227,190,500
Q4 2006	9	53	\$1,437,129,240
2006	61	192	\$14,635,219,740

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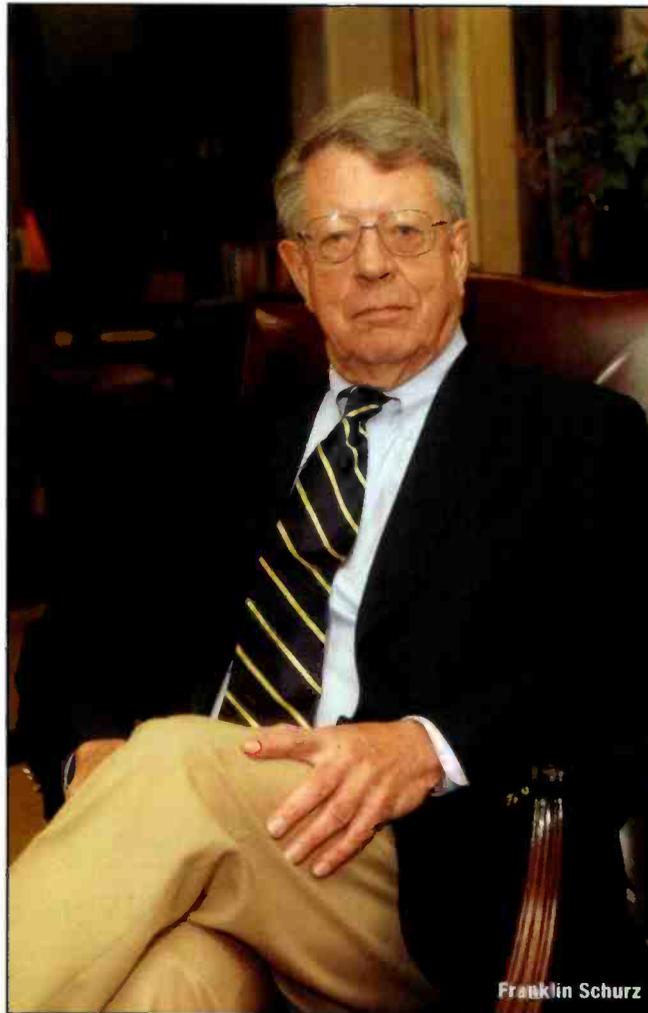
## Growth is a *Schurz* thing

Wall Street doesn't like newspapers. Wall Street doesn't like radio. Wall Street only likes pure play media companies. So what? Schurz Communications doesn't care what Wall Street thinks. The company is private, family-owned, diversified across all sorts of media and, as of late, very acquisitive.

Already this year Schurz has made its first genuine TV duopoly deal, agreeing to pay \$6.8 million to acquire KSCW-TV, a CW affiliate, to combine with its Wichita, KS CBS affiliate, KWCH-TV. That follows a year of active buying and growing in 2006, when the company, based in South Bend, IN, acquired newspapers in Michigan and South Dakota, a cluster of radio stations in South Dakota, interest in a TV "virtual duopoly" in Springfield, MO, the aforementioned KWCH and launched digital multicast CW or MyNetworkTV stations in three markets. As a result, Schurz added 488 full- and part-time employees.

It has been a very active period, but Chairman & CEO **Franklin Schurz** says it wasn't because he suddenly got interested in buying things. "Actually that represents a culmination of several years efforts and I think it was one of those situations where finally the prices and the conditions got to where there was more available and then there was more in the buying range, but we've spent three or four years looking at things and there just weren't very many things and finally it was like the wagon that got stuck. We got it out of the mud and started rolling downhill. We did have a big year but it wasn't exactly the way we had planned it," he said of the recent activity.

While still focused in the Midwest, Schurz has been expanding its geographic footprint. It is an unusual company in its



Franklin Schurz

wide array of assets: newspapers, television, radio, cable television systems, shoppers, even a phone book. So, what excites Franklin Schurz about a potential acquisition?

"I think increased diversification both by media and by geography," he told us. And will the company move into bigger markets? "We can take a look at somewhat larger markets but we really like the medium and smaller markets," Schurz said.

And, like so many media companies, Schurz Communications is ramping up its digital media operations. "We think the Internet is going to work, in addition to traditional media, there is certainly advertising money going there. We've wrapped up our hires and our infrastructure and we will be focusing a lot of our attention on digital media," Schurz said.

A 24/7 Digital News Desk is up and running in South Bend, where Schurz has a daily newspaper, a TV station and two radio stations. In a recent speech to employees, President and COO **Todd Schurz**, Franklin's nephew, noted that local search will be implemented in all of the company's markets by the end of Q2. The privately held company doesn't release financial data for its traditional media outlets, but proudly notes that Interactive revenue is expected to increase 120% this year from 2006 to \$9.1 million.

While you now read constantly about the troubles afflicting the newspaper business, Schurz is still a buyer, not a seller. "We think it's still a solid business and we think with online it's probably the biggest content provider within a community," he noted. "They've got an awful lot to offer. We want to be in the content business as well as distribution."

Schurz Communications is pretty decentralized, with local managers handling most of the vendor decisions. "I think ►►



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**BIA** Information  
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# MEDIA MARKETS & MONEY

we have been operating fairly independently. We'll perhaps be a little less so in the future because we do see some common ground where all can benefit and we do tend to get more and more into idea sharing. We don't mandate the same vendor in this case, or we don't buy the same programming for groups, because it's still a market-by-market competition. We think those who are in those markets are best able to call that shot, but if we're buying say some equipment and more than one is going to do it, then we'll try to do some coordination," Franklin Schurz said.

You may have noticed in our earlier listing of the array of media properties at Schurz that the company owns both TV stations and cable systems. That puts it in an interesting position for the current issue of retransmission consent payments. "We're going to try to be as fair as we can to both sides. I don't think we have an extreme position one way or the other," Franklin Schurz said diplomatically.

A mere 135 years old—and "we look forward to the next 135" the CEO notes—the company began when **Alfred B. Miller** and **Elmer Crockett** founded the South Bend Tribune, which is still the flagship newspaper of the company. Franklin Schurz's father was a nephew of the childless Miller and both families continue to this day as shareholders of what is now Schurz Communications.

What was once a fairly small family company is now pretty large for a private media company. So, has Schurz Communications ever considered selling stock on Wall Street?

"Oh, I think we've had those conversations for 30 or 40 years and we've always come down to the same side that we really want to remain private," Schurz replied.

It was nearly 51 years ago that Franklin Schurz went to work at the company which bears his family name. Back then, everything the company owned was in one market, South Bend, Indiana. "Then in 1960 we acquired two newspapers in western Maryland, I went there for 11 years and while there got involved in our broadcast in Roanoke and our newspapers both in Southern Indiana and Southern California," he reminisced. A bit before his time, the company expanded from the newspaper business in 1922 to launch WGAZ Radio (now WSBT-AM). WSBT-TV began in 1952, eight years before that first newspaper expansion to another state. The first cable system, in Hagerstown, MD, was acquired in 1968. The most recent new business line was commercial printing, in 2000, with the purchase of Miller Rainbow Printing in Bedford, IN. Today Schurz Communications has operations in Indiana, Kentucky, Kansas, Maryland, Pennsylvania, California, Missouri, Michigan, South Dakota, Georgia and Virginia.

That's a lot of growth and Franklin Schurz has been there for most of it. Now he is preparing to move to the sidelines. "Well, I think probably my best years may be behind me. My genera-

tion has pretty well announced that we will be passing the torch to the next generation and we are moving in that direction, both in terms of family meetings and we've got a consultant hired. We're working with some people on strategic planning. We have a succession committee so that process is moving forward and eventually that torch will be passed," he said.

You don't sound like you're in a hurry though, we noted. "Well I think it's better to get it right than guess." ■

## Value in values

Schurz Communications doesn't answer to Wall Street, but it does answer to a proud history and a formal statement of corporate values.

### Schurz Communications Core Values Statement:

We constantly strive to improve to meet the needs and wants of readers, listeners, viewers and advertisers. We believe that talented and dedicated employees have made the company successful in the past and are the hope of the future. We are committed to providing an environment that gives our employees the opportunity to achieve their potential.

Our company's strength mirrors the strength of our communities. We support our local communities as a good corporate citizen and encourage active involvement. We are committed to excellence in all that we do. We hold each other accountable for using our best efforts to achieve success.

We believe in delegating decision-making authority to individual property management. Our goal is to be the leader in news and information in our markets. We believe that financial profitability provides the resources necessary for the company's long-term health and growth. We set operating and financial expectations through the budgeting process and hold each other responsible to meet those goals.

We value our reputation for honesty and fairness. Our credibility and integrity never will be sacrificed to achieve other objectives. We are stewards of this company. Earlier generations started it, grew it and gave it to us to grow. We reinvest for the future and will pass it along to successive generations.



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<p>Radio Fargo-Moorhead, Inc. <i>has acquired</i> Seven Station Radio Cluster serving Fargo, ND from Clear Channel Communications <i>for</i> \$14,000,000</p>	<p>David and Mel Winters <i>have sold</i> Two Radio Clusters serving Minnesota, WI/Menominee MI and Ironwood MI to Armada Media Corporation <i>for</i> \$8,500,000</p>	<p>Results Radio, LLC <i>has sold</i> KRQP (FM) serving Santa Rosa, CA to Maverick Media <i>for</i> \$7,700,000</p>	<p>Results Radio, LLC <i>has sold</i> KMHX (FM) and KSRT (FM) serving Santa Rosa, CA to Lazer Broadcasting Corp. <i>for</i> \$6,850,000</p>
<p>Daystar Television Network <i>has sold</i> KDTP-TV serving Phoenix, AZ to NBC/GE <i>for an undisclosed amount</i></p>	<p>National Grid Wireless <i>has acquired</i> ClearShot Communications 235 Towers</p>	<p>Lakewood Church <i>has sold</i> KTBU-TV serving Houston, TX to USFR Media Group <i>for</i> \$30,000,000</p>	<p>Riviera Broadcast Group LLC <i>has raised</i> \$60,000,000 <i>in equity and debt capital</i></p>
<p>Denver Radio Company, LLC <i>has raised</i> \$27,500,000 <i>in term loan financing from</i> Guggenheim Corporate Funding</p>	<p>Lazer Broadcasting <i>has raised</i> \$23,000,000 <i>in term loan and revolving credit</i> <i>financing from</i> GE Capital</p>	<p>NewComm Wireless <i>has raised</i> \$60,000,000 <i>in senior financing from</i> D.B. Zwiirn</p>	<p>National Grid Wireless <i>has acquired</i> Beacon Broadcasting Corporation 11 Towers</p>
<p>TCP Communications, LLC <i>has sold</i> 233 Towers <i>to</i> Global Tower Partners <i>for an undisclosed amount</i></p>	<p>A.L.B.S. Wireless Services II, LLC <i>has sold</i> 32 Towers to Global Tower Partners <i>for an undisclosed amount</i></p>	<p>TX-11 Acquisition, LLC <i>has sold</i> 18 towers to SBA Communications Corporation <i>for an undisclosed amount</i></p>	<p>BFT Tower Co., I&amp;II <i>has sold</i> 10 Towers <i>to</i> Global Tower Partners <i>for an undisclosed amount</i></p>
<p>Pendrell Sound <i>has sold certain PCS licenses covering</i> 800,000 Pops in Indiana to Verizon Wireless <i>for an undisclosed amount</i></p>	<p>Summit Wireless, LLC <i>has sold certain PCS licenses covering</i> 697,000 Pops in Mississippi to Sprint Nextel <i>for an undisclosed amount</i></p>	<p>Summit Wireless, LLC <i>has sold certain PCS licenses covering</i> 191,000 Pops in West Virginia to Ntelos <i>for an undisclosed amount</i></p>	<p>Endless Mountains Wireless, LLC <i>has been acquired by</i> Dobson Communications Corporation <i>for an undisclosed amount</i></p>
<p>Tribune Broadcasting Company <i>has sold</i> Broadcasting Tower in Albany, NY to Bradford Realty <i>for an undisclosed amount</i></p>	<p>Towers of Texas <i>has sold</i> 137 Towers <i>to</i> Global Tower Partners <i>for an undisclosed amount</i></p>	<p>AAA Entertainment, LLC <i>has sold</i> Four Station Radio Cluster serving Champaign, IL to RadioStar Inc. <i>for</i> \$3,500,000</p>	<p>AAA Entertainment, LLC <i>has sold</i> WXCL (FM) and WDQX (FM) serving Peoria, IL to Triad Broadcasting Company <i>for</i> \$5,200,000</p>

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