

1996 Edition

# The M Street Radio Directory



from the editors of

***THE M STREET JOURNAL***  
RADIO'S JOURNAL OF RECORD

U.S. and Canadian AM & FM Stations  
Program Formats and Station Personnel  
The M Street Radio Markets  
LMA and Duopoly Listings  
Arbitron and Willight Ratings



ON AIR

Old Stations & New Stations

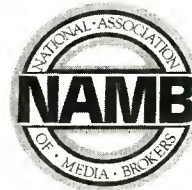
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# The M Street Radio Directory



1996 EDITION

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and Pat McCrummen

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M Street Corporation

New York, NY

Nashville, TN



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## Your M Street Dollars At Work or, “The Dog Ate Up Our Time”

The last edition of the M Street Directory was dated 1995. This edition of the M Street Radio Directory is dated 1996. So if it seems like it's really taken us 18 months to put this directory out, it's just an optical illusion, a hallucination, a trick of the light, of just a *really* long year.

The truth is that it *has* been a long year—the most action-packed year in M Street's history. Since the last M Street directory, we've expanded into the publishing of other books with the release of Valerie Geller's new news/talk manual, “Creating Powerful Radio.” And as M Street's station information becomes widely recognized as the most accurate in the industry, we continue to supply data to other directories, including the Country Music Association's annual directory and Billboard Magazine's Power Book, Latin Directory, and “Nashville 615” Directory. Our data is now available to subscribers of Tapscan, Strata and Marketron by adding an M Street data agreement to their existing service. You can also look for M Street joint ventures with Airplay Monitor and others in the months to come. Were we immodest, we'd say that we were taking over data services for the industry; instead, think of these as our version of a joint programming agreement. We've also moved one office and opened a second, something that we managed to do during the East Coast's great deep freeze of '96. Our new address in Nashville is Box 1479, Madison, TN, 37116. The Nashville phone is 615-865-1525; fax, 615-865-2598. The new address in New York is Box 2041, New York, NY 10159. The phone number is 212-689-5458; fax 212-689-7283.

On top of all this, we've managed to expand the M Street staff to five people—our largest roster ever. When Pat McCrummen joined several years ago as a co-publisher, it was the first time that one of the many friends of M Street became an agent of M Street. This year we struck again, adding ABC director of research June Barnes as director of information services. We've also hired administrative assistants Pam Riggins and Eric Teplitz. Their addition to our Nashville office ensures both better service for our subscribers and day-to-day customers, and that it won't be another 18 months to the next directory.

Then there was a little thing called the Telecommunications Bill. Duopoly meant that station information was harder to track than ever. Megapoly might have sunk lesser data providers. Keeping track of six co-owned stations in three buildings with plans to move to a fourth is a challenge, but it's one that we've accepted for the past eight years. Now, we've moved on to the issue of how to code stations in the expanded AM band that have the same call letters but different programming. (They appear as “WJDM-EB,” by the way).

Against the canvas of megapoly, we've been able to offer you *more* station info. The 1995 book had GM information for all stations and PD/SM info for stations in Arbitron-rated markets. This year's directory has that information for all 12,000+ stations. We've also added that information for Canadian stations, meaning that beyond the most obvious applications of the M Street Directory, you can also have hours of fun trying to pronounce the names of Quebec's GMs.

We've only made one change in the way we code formats this year. In last year's directory, we were still coding most '70s oldies outlets as “OL” or, since most of them were usually classic rock outlets in disguise, “CR.” This year, true '70s pop oldies outlets are coded as “OL-70.” The formats you see in this book, by the way, will sometimes differ from what stations themselves would tell you. One of the industry dynamics that created the need for M Street was the tendency of stations to occasionally represent themselves to the industry as something more potentially saleable than their actual format. M Street formats represent the opinions of the format experts at M Street and not necessarily that of the stations themselves. We think our record speaks for itself on these matters.

A brief note on our most asked format question, “What is alternative?” The answer is that we don't know any more than you do. We often sit around asking ourselves, “How can Pearl Jam be alternative?” For our coding we use “NR” or new-rock for hit-based formats and “AP” for adult alternative and the more eclectic varieties of the format.

Even as you read this we are hard at work on another M Street Directory. We'll also release the M Street Group Broadcaster Directory, listing over 900 groups, their stations, their stations' ratings, and their stations' personnel. The group broadcaster listing has been one of our most requested reports and we're happy to make it widely available. If there's other custom information you need, we'd be happy to supply it to you just as we supply thousands of others from all ends of the industry.

We like to think our information is the industry's most accurate. Inevitably, given the ever-changing nature of our industry, especially this year, you'll spot errors or outdated info. We place thousands of calls each month and drive to places that just don't get a lot of business travel to update our information. But we also depend on you. If your information changes, call us at 615-865-1525 or by fax at 615-865-2598, and we'll correct it immediately.

The changes in radio have worked to make 1996 the most exciting year in recent memory for many broadcasters. We hope you'll say the same about this year's directory.

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

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

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

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

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

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

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

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

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

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

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

Richland	
KOL-FM 94.1	Easy Listening [EZ] 100000w 298 ft 8n 4t app 100000,1200 app add directional antenna +Smith Broadcasting Corp. Sister KOL LMA controls KTW-FM 509-555-9494 fax 509-555-9495 815 N Columbia Blvd, Kennewick 99336 GM Bob Smith PD Aaron Smith SM Delores Smith Richland/Kennewick/Pasco Arbitron 3.1% 800p Walla Walla Willhight 6.5%

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

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

(Continued next page)



# GUIDE TO USE

## Richland

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

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

## Richland

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

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

## Richland

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

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

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

For example: "7c" means that the station changed its call letters in 1987. "4t" means that the station changed its format in 1994.

## Richland

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

The owner of the station.

A "+" preceding the owner indicates the company (not necessarily under the same name) has an ownership interest in stations in other markets.

## Richland

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

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

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

An AM or FM affiliated sister station(s) in the same market area is shown following the ownership information. If the station is managing another station through a Local Marketing Agreement (LMA), the listing will read "LMA controls." If the station is being managed by another station, the listing will read "LMA by." If two or more stations are in a joint operating agreement, the listing will read "LMA with." If two stations have a Sales Marketing Agreement (SMA), the listing will read "SMA with."

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

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

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

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

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

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

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

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



# STRATA

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	Format	Phone	Persons 12p			Adults 25-54		
			Avg Aud Rnk	AQH (00)	Shr	Avg Aud Rnk	AQH (00)	Shr
WACC-FM	Rock	861-8100	3	329	2.1	2	184	2.0
WGGG-AM	Talk	222-4700	1	1055	6.7	1	322	3.4
WJJP-AM	Adult Standards/Talk	977-1800	2	429	2.7	3	81	0.9
Yountown, USA WIS4 MSA Arbitron			1	604	11.4	2	196	6.3
WAOO-FM	Country	729-4400	3	57	0.4	3	40	0.4
WADD-FM	Alternative	777-1700	2	391	2.5	1	350	3.7
WMMM-FM	New Rock	527-8348	1	450	2.8	2	270	2.9
Outtown, USA WEM MSA Arbitron			2	299	5.7	1	220	7.0

Display totals for stations and shares across multiple markets. VIEW's automated Windows-based analysis system makes it easy.

See format information at a glance. The intuitive spreadsheet layout enables you to quickly assess what stations to target.

	Persons 12p									
	AOR	CHK	GSL	CTY	TWI	OLD	SPA	KPI	STY	URB
	Stations	Stations	Stations	Stations	Stations	Stations	Stations	Stations	Stations	Stations
Yountown, USA WIS4 MSA Arbitron	WJJP-FM WACC-FM	WCCC-FM	WEEF-FM WRRR-FM WSSS-FM	WAOO-FM WZZZ-FM	WGCC-AM WOOO-AM WOOO-FM WFFF-FM WQQQ-AM WAIL-AM	WAHH-FM WAFB-FM	WUJL-AM WUUL-FM WAPP-AM WXXY-AM	WPPP-AM WVVV-AM	WAAA-AM WJJJ-AM	WFFF-FM WLLL-AM WLLL-FM

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**The M Street Database  
Format Codes**

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

**AC Adult Contemporary**

An adult-oriented pop/rock station, with no hard rock, possibly some non-rock music, and often a greater emphasis on non-current music. AC-OL would be a gold based AC.

**AH Hot AC or "Adult CHR"**

A more up-tempo contemporary hits format, with no hard rock and no rap.

**AP Adult Alternative**

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

**AR Album - Rock**

Mainstream rock & roll. Can include more guitar-oriented "heavy metal."

**AS Adult Standards**

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

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

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

**CR Classic Rock**

Rock oriented oldies, often mixed with hit oldies of the 60's, 70's and 80's. sometimes called "Classic Hits."

**CW Country**

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

**DR Drama**

Radio dramas, often pre-1950.

**ET Ethnic**

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

**EZ Easy Listening**

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

**FA Fine Arts - Classical**

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

**FF French**

French-language programming.

**FX Farm News and Talk****HA Comedy****JZ Jazz**

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

**NR New Rock - Modern Rock****NX News**

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

**OL Oldies**

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

**PT Pre-teen**

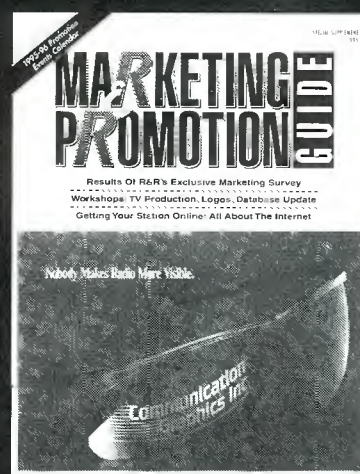
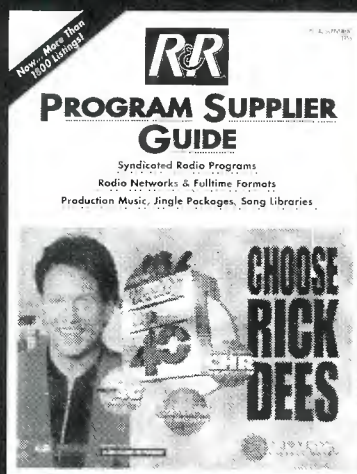
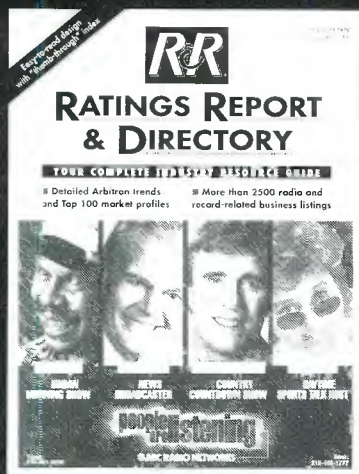
Music, drama or readings intended primarily for a pre-teen audience.

**RB R & B - Urban**

Can cover a wide range of musical styles, often called "Urban Contemporary."

(Continued next page)

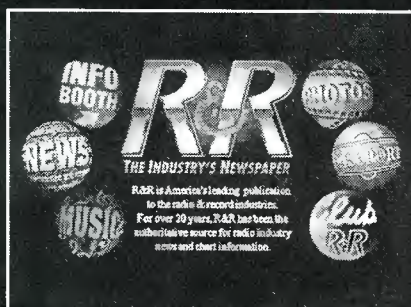
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**R&R**  
THE INDUSTRY'S NEWSPAPER

## RC Religious - Contemporary

Modern and rock-based religious music.

## RG Religious - Gospel

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

## RL Religion

Local or syndicated religious programming, sometimes mixed with music.

## SA Soft Adult Contemporary

A cross between Adult Contemporary and Easy Listening. Primarily non-current, soft rock originals; can also be mixed with Adult Standards or "Smooth Jazz."

## SB Soft Urban Contemporary

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

## SG Southern Gospel

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

## SS Spanish

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

## SX Sports

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

## TK Talk

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

## MT Financial Talk

All financial or "Money-Talk."

## VA Variety

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

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



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## FORMAT STATISTICS

### M Street format data produces the following format information:

Counts as of October 1995

Primary Format	Total	Commercial	Non-Comm.	% AM	% FM	Simulcast	Network
1 Country	2,622	2,613	9	38%	62%	379 14%	524 20%
2 News, Talk	1,308	1,036	272	77%	23%	101 8%	559 43%
3 Adult Contemporary	1,072	1,052	20	31%	69%	93 9%	168 16%
4 Religion (Teaching, Variety)	784	418	366	45%	55%	57 7%	95 12%
5 Oldies	711	710	1	38%	62%	49 7%	248 35%
6 Adult Standards	473	470	3	87%	13%	27 6%	287 61%
7 Spanish	463	427	36	62%	38%	48 10%	10 2%
8 Variety	442	62	380	15%	85%	34 8%	-
9 Top-40 (CHR)	371	318	53	4%	96%	17 5%	-
10 Alternative Rock	361	80	281	2%	98%	9 2%	-
11 Soft Adult Contemporary	349	347	2	27%	73%	30 9%	106 30%
12 Rock	311	301	10	7%	93%	28 9%	13 4%
13 Classic Rock, Classic Hits	309	306	3	3%	97%	23 7%	60 19%
14 Classical, Fine Arts	269	39	230	2%	98%	54 20%	32 12%
15 Adult Hits, Hot AC	258	256	2	6%	94%	15 6%	31 12%
16 Contemporary Christian	254	132	122	17%	83%	25 10%	58 23%
17 Southern Gospel	251	239	12	81%	19%	10 4%	62 25%
18 Urban, R&B	217	184	33	29%	71%	10 5%	-
19 Jazz, New Age	159	80	79	9%	91%	9 6%	22 14%
20 Black Gospel	151	147	4	89%	11%	4 3%	3 2%
21 Sports	148	148		97%	3%	8 5%	115 78%
22 New Rock, Modern Rock	141	141		6%	94%	11 8%	10 7%
23 Urban AC	117	116	1	28%	72%	6 5%	46 39%
24 Ethnic	76	67	9	72%	28%	3 4%	1 1%
25 Easy Listening	70	61	9	14%	86%	2 3%	-
26 Gospel	55	45	10	78%	22%	3 5%	1 2%
27 R&B Oldies	47	47		85%	15%	-	28 60%
28 Pre-Teen	28	28		93%	7%	2 7%	24 86%
not available or changing	17	10	7		100%		
<b>Total operating stations</b>	<b>11,834</b>	<b>9,880</b>	<b>1,954</b>	<b>42%</b>	<b>58%</b>	<b>1057 9%</b>	<b>2503 21%</b>
Stations off the air	342	(244 AM and 98 FM)		71%	29%		
Construction permits	577	(79 AM and 498 FM)		14%	86%		
<b>Total stations and CP's</b>	<b>12,753</b>	<b>(5,209 AM and 7,724 FM)</b>		<b>41%</b>	<b>59%</b>		

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Stations are counted in their primary format only.

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

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# FORMAT STATISTICS

## M Street format counts for AM & FM stations

Counts as of October 1995

Primary Format		AM	%	Primary Format		FM	%
1	Country	1,005	21.4%	1	Country	1,617	22.7%
2	News, Talk	1,004	21.3%	2	Adult Contemporary	745	10.5%
3	Adult Standards	410	8.7%	3	Oldies	443	6.2%
4	Religion (Teaching, Variety)	355	7.5%	4	Religion (Teaching, Variety)	429	6.0%
5	Adult Contemporary	327	6.9%	5	Variety	377	5.3%
6	Spanish	287	6.1%	6	Top-40 (CHR)	358	5.0%
7	Oldies	268	5.7%	7	Alternative Rock	354	5.0%
8	Southern Gospel	203	4.3%	8	News, Talk	304	4.3%
9	Sports	143	3.0%	9	Classic Rock	299	4.2%
10	Black Gospel	135	2.9%	10	Rock	288	4.0%
11	Soft Adult Contemporary	94	2.0%	11	Classical, Fine Arts	263	3.7%
12	Variety	65	1.4%	12	Soft Adult Contemporary	255	3.6%
13	Urban, R&B	63	1.3%	13	Adult Hits, Hot AC	242	3.4%
14	Ethnic	55	1.2%	14	Contemporary Christian	211	3.0%
15	Gospel	43	0.9%	15	Spanish	176	2.5%
16	Contemporary Christian	43	0.9%	16	Urban, R&B	154	2.2%
17	R&B Oldies	40	0.8%	17	Jazz, New Age	145	2.0%
18	Urban AC	33	0.7%	18	New Rock, Modern Rock	133	1.9%
19	Pre-Teen	26	0.6%	19	Urban AC	84	1.2%
20	Rock	23	0.5%	20	Adult Standards	63	0.9%
21	Adult Hits, Hot AC	16	0.3%	21	Easy Listening	60	0.8%
22	Jazz, New Age	14	0.3%	22	Southern Gospel	48	0.7%
23	Top-40 (CHR)	13	0.3%	23	Ethnic	21	0.3%
24	Easy Listening	10	0.2%	24	Black Gospel	16	0.2%
25	Classic Rock	10	0.2%	25	Gospel	12	0.2%
26	New Rock, Modern Rock	8	0.2%	26	R&B Oldies	7	0.1%
27	Alternative Rock	7	0.1%	27	Sports	5	0.1%
28	Classical, Fine Arts	6	0.1%	28	Pre-Teen	2	0.0%
	not available or changing	-			not available or changing	17	0.2%
	<b>Total operating stations</b>	<b>4,706</b>	<b>100%</b>		<b>Total operating stations</b>	<b>7,128</b>	<b>100%</b>
	Silent	244			Silent	98	
	Construction Permits	79			Construction Permits	498	

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# The M Street Journal

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# FORMAT STATISTICS

## M Street Format Trends from 1989 to 1995

Counts as of October 1995

Commercial								94/95	89/95
Stations by primary format	1989	90	91	92	93	94	95	+/-	+/-
<b>FORMAT</b>									
Country	2448	2452	2457	2552	2612	2642	2613	-29	165
Adult Contemporary	2058	2135	2088	1963	1895	1784	1655	-129	-403
News, Talk, Business, Sports	308	405	527	648	841	1028	1184	156	876
Religion (Teaching & Music)	696	745	799	837	915	926	981	55	285
Rock (Album, Modern, Classic)	365	419	529	592	643	721	828	107	463
Oldies	545	659	704	731	734	714	710	-4	165
Spanish & Ethnic	313	342	370	385	421	470	494	24	181
Adult Standards	332	383	408	412	421	435	470	35	138
Urban, Black, Urban AC	284	294	311	313	321	328	347	19	63
Top-40 (CHR)	951	824	675	578	441	358	318	-40	-633
Jazz & New Age	64	68	53	52	45	43	80	37	16
Variety	134	97	81	72	68	63	62	-1	-72
Easy Listening	328	240	210	171	116	106	61	-45	-267
Classical, Fine Arts	49	52	51	48	45	44	39	-5	-10
Pre-Teen	0	3	4	3	13	19	28	9	28
Comedy	1	1	0	0	0	1	0	-1	-1
Off Air	112	210	308	352	345	369	308	-61	196
Changing formats / not available	266	115	19	15	14	6	10	4	-256
<b>Total stations</b>	<b>9254</b>	<b>9444</b>	<b>9594</b>	<b>9724</b>	<b>9890</b>	<b>10057</b>	<b>10188</b>	<b>131</b>	<b>934</b>
Non-Commercial								94/95	89/95
FORMAT	1989	90	91	92	93	94	95	+/-	+/-
Religion (Teaching & Music)	302	332	352	391	431	473	514	41	212
Variety	387	379	391	386	384	381	380	-1	-7
Rock (Album, Modern, Classic)	226	242	291	278	285	289	294	5	68
News, Talk, Business, Sports	11	31	104	151	190	245	272	27	261
Classical, Fine Arts	306	320	297	275	267	239	230	-9	-76
Jazz & New Age	37	75	72	72	75	76	79	3	42
Top-40 (CHR)	71	71	73	67	65	57	53	-4	-18
Spanish & Ethnic	34	34	37	38	39	42	45	3	11
Urban, Black, Urban AC	32	37	34	35	36	32	34	2	2
Adult Contemporary	16	17	21	21	21	20	24	4	8
Easy Listening	7	8	11	11	10	9	9		2
Country	8	7	7	8	6	6	9	3	1
Adult Standards	0	1	0	0	1	2	3	1	3
Oldies	0	0	0	1	1	2	1	-1	1
Pre-Teen	0	0	0	0	0	0	0		
Comedy	0	0	0	0	0	0	0		
Off Air	4	2	23	23	23	40	34	-6	30
Changing formats / not available	125	80	13	12	15	4	7	3	-118
<b>Total stations</b>	<b>1566</b>	<b>1636</b>	<b>1726</b>	<b>1769</b>	<b>1849</b>	<b>1917</b>	<b>1988</b>	<b>71</b>	<b>422</b>

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# FORMAT STATISTICS

## M Street commercial station format data produces the following information Large Markets Vs. Small Markets

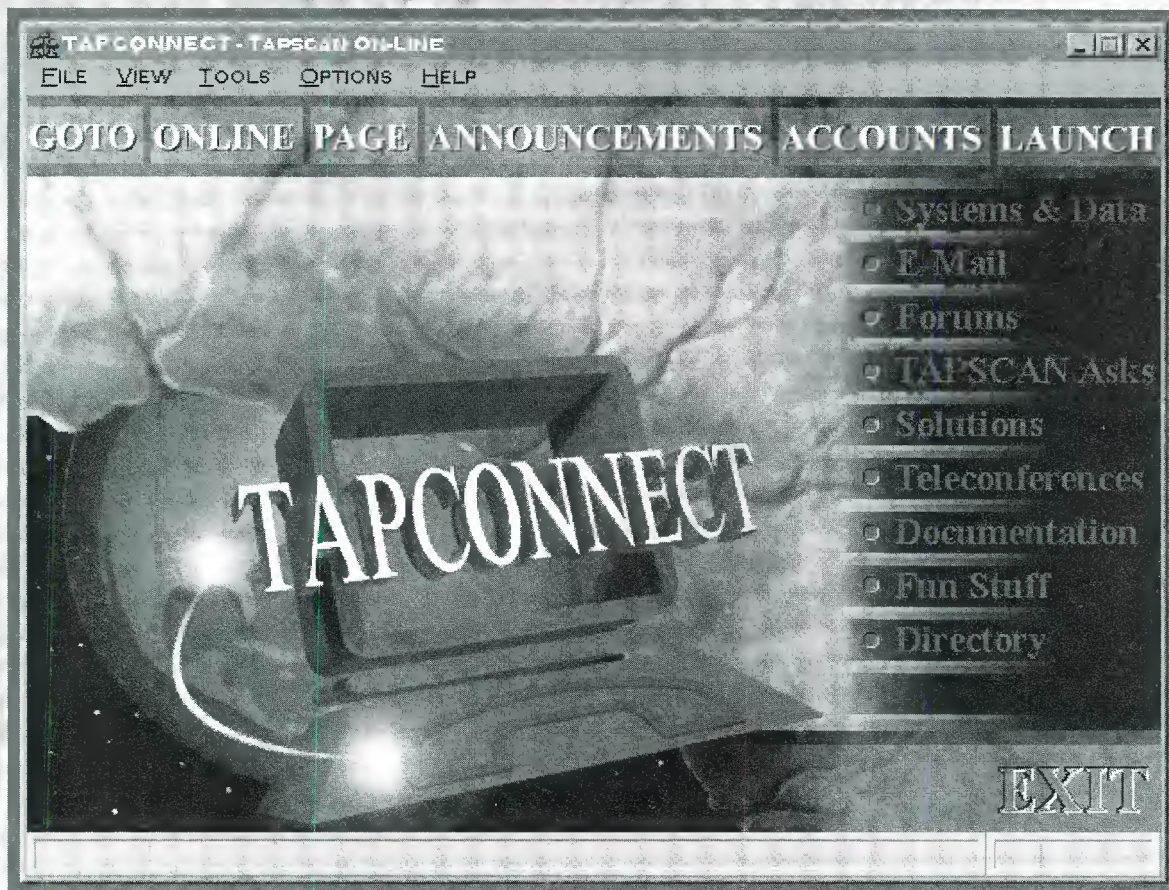
Counts as of October 1995		Primary Format		Arbitron Markets		Arbitron Markets		RTG		Non-Arbitron Markets	
	Total	Arbitron	Not	Total	Arbitron Markets	Total	%	RTG	Total	%	
1 Country	2,613	837	68%	1,776	1 Country	837	15.9%	11.9%	1 Country	1,776	36.2%
2 Adult Contemporary	1,052	365	35%	687	2 News, Talk	655	12.4%	12.3%	2 Adult Contemporary	687	14.0%
3 News, Talk	1,036	655	63%	381	3 Adult Contemporary	365	6.9%	5.8%	3 News, Talk	381	7.8%
4 Oldies	710	357	50%	353	4 Oldies	357	6.8%	6.0%	4 Oldies	353	7.2%
5 Adult Standards	470	302	64%	168	5 Adult Standards	302	5.7%	3.0%	5 Soft Adult Contemporary	177	3.6%
6 Spanish	427	267	63%	160	6 Religion (Teaching, Variety)	296	5.6%	0.8%	6 Adult Standards	168	3.4%
7 Religion (Teaching, Variety)	418	296	71%	122	7 Spanish	267	5.1%	4.4%	7 Spanish	160	3.3%
8 Soft Adult Contemporary	347	170	49%	177	8 Rock	248	4.7%	5.9%	8 Southern Gospel	141	2.9%
9 Top-40 (CHR)	318	220	69%	98	9 Top-40 (CHR)	220	4.2%	3.7%	9 Adult Hits, Hot AC	137	2.8%
10 Classic Rock	306	201	66%	105	10 Classic Rock	201	3.8%	3.7%	10 Religion (Teaching, Variety)	122	2.5%
11 Rock	301	248	82%	53	11 Soft Adult Contemporary	170	3.2%	4.2%	11 Classic Rock	105	2.1%
12 Adult Hits, Hot AC	239	119	46%	137	12 Urban, R&B	135	2.6%	5.6%	12 Top-40 (CHR)	98	2.0%
13 Southern Gospel	256	98	41%	141	13 New Rock, Modern Rock	129	2.4%	3.4%	13 Rock	53	1.1%
14 Urban, R&B	184	135	73%	49	14 Black Gospel	122	2.3%	0.9%	14 Urban, R&B	49	1.0%
15 Sports	148	121	82%	27	15 Sports	121	2.3%	1.3%	15 Contemporary Christian	47	1.0%
16 Black Gospel	147	122	83%	25	16 Adult Hits, Hot AC	119	2.3%	3.0%	16 Variety	41	0.8%
17 New Rock, Modern Rock	141	129	91%	12	17 Urban AC	99	1.9%	3.0%	17 Alternative rock	29	0.6%
18 Contemporary Christian	132	85	64%	47	18 Southern Gospel	98	1.9%	0.1%	18 Gospel	27	0.5%
19 Urban AC	116	99	85%	15%	19 Contemporary Christian	85	1.6%	0.3%	19 Sports	27	0.5%
20 Alternative rock	80	51	64%	29	20 Jazz, New Age	64	1.2%	2.0%	20 Black Gospel	25	0.5%
21 Jazz	80	64	80%	16	21 Ethnic	54	1.0%	0.3%	21 Easy Listening	21	0.4%
22 Ethnic	67	54	81%	13	22 Alternative rock	51	1.0%	1.2%	22 Urban AC	17	0.3%
23 Variety	62	21	34%	41	23 Easy Listening	40	0.8%	0.4%	23 Jazz, New Age	16	0.3%
24 Easy Listening	61	40	66%	21	24 R&B Oldies	37	0.7%	0.3%	24 Ethnic	13	0.3%
25 R&B Oldies	47	37	79%	10	25 Classical, Fine Arts	35	0.7%	1.3%	25 New Rock	12	0.2%
26 Gospel	45	18	40%	27	26 Pre-Teen	26	0.5%	0.0%	26 R&B Oldies	10	0.2%
27 Classical, Fine Arts	39	35	90%	4	27 Variety	21	0.4%	1.0%	27 Classical, Fine Arts	4	0.1%
28 Pre-Teen	10	1	10%	9	28 Gospel	18	0.3%	0.0%	28 Pre-Teen	2	0.0%
not available or changing	308	103	33%	205	not available or changing	1	0.0%	0.0%	not available or changing	9	0.2%
Silent	10,188	5,276	52%	4,912	Silent	103	2.0%		Silent	205	4.2%
<b>Total stations</b>					<b>Total stations</b>				<b>Total stations</b>		
	10,188	5,276	52%	4,912		5,276				4,912	

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RTG = Arbitron 6am to 12 midnight average quarter hour percent, based on all markets Spring 1995  
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# FORMAT STATISTICS

## M Street Format Data 1995 vs. 1994

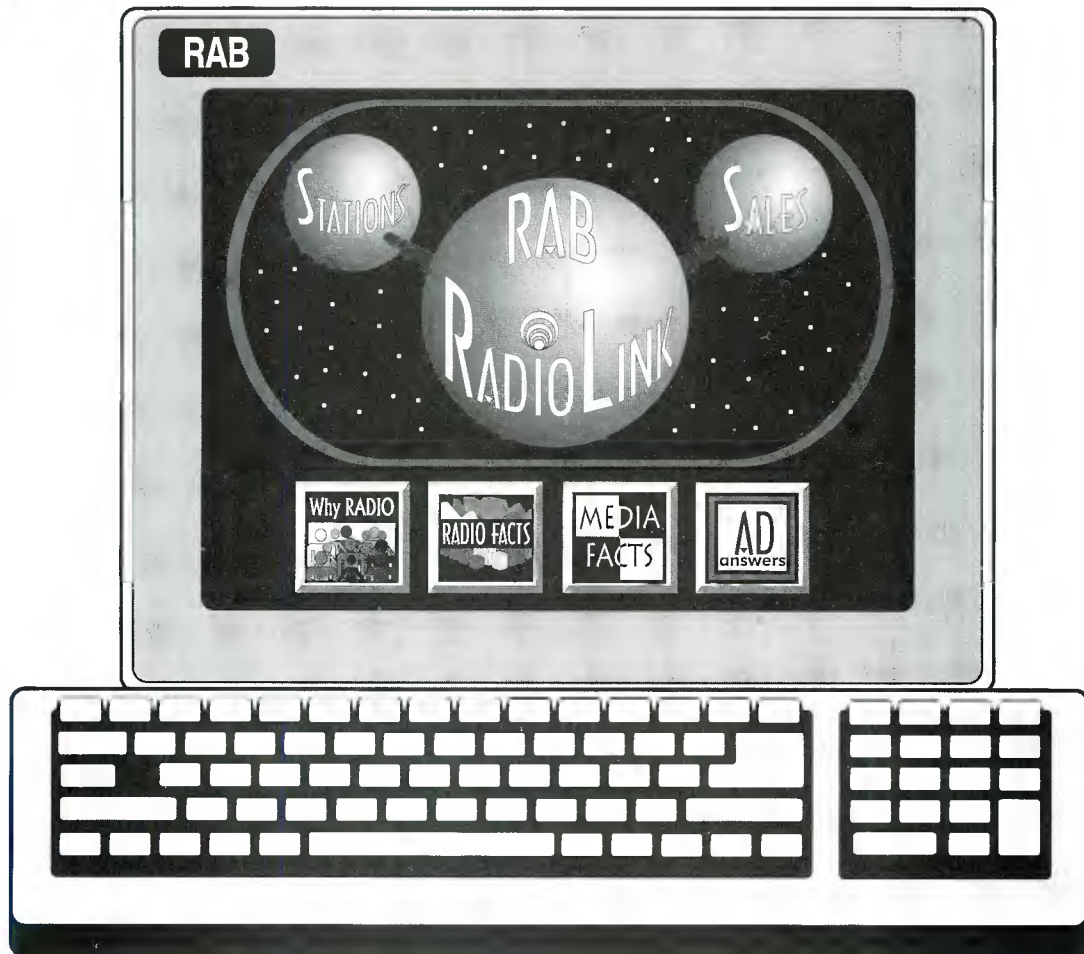
Commercial Stations In Arbitron Markets	Station counts			Market Share			AQH Ratings		
	Total 94	Total 95	+/-	% 94	% 95	+/-	RTG 94	RTG 95	+/-
Country	846	837	-9	16.3%	15.9%	-0.5%	12.7%	11.9%	-0.8%
News, Talk	622	655	33	12.0%	12.4%	0.4%	12.4%	12.3%	-0.1%
Adult Contemporary	420	365	-55	8.1%	6.9%	-1.2%	6.6%	5.8%	-0.8%
Oldies	366	357	-9	7.1%	6.8%	-0.3%	5.5%	6.0%	0.5%
Adult Standards	277	302	25	5.4%	5.7%	0.4%	3.1%	3.0%	-0.1%
Religion (Teaching, Variety)	299	296	-3	5.8%	5.6%	-0.2%	0.6%	0.8%	0.2%
Spanish	243	267	24	4.7%	5.1%	0.4%	3.7%	4.4%	0.7%
Rock	260	248	-12	5.0%	4.7%	-0.3%	7.0%	5.9%	-1.1%
Top-40 (CHR)	236	220	-16	4.6%	4.2%	-0.4%	6.4%	5.9%	-0.5%
Classic Rock	173	201	28	3.3%	3.8%	0.5%	2.0%	3.7%	1.7%
Soft Adult Contemporary	168	170	2	3.2%	3.2%	-0.0%	4.5%	4.2%	-0.3%
Urban, R&B	152	135	-17	2.9%	2.6%	-0.4%	6.1%	5.6%	-0.5%
New Rock, Modern Rock	51	129	78	1.0%	2.4%	1.5%	1.9%	3.4%	1.5%
Black Gospel	100	122	22	1.9%	2.3%	0.4%	1.3%	0.9%	-0.4%
Sports	96	121	25	1.9%	2.3%	0.4%	1.2%	1.3%	0.1%
Adult Hits, Hot AC	129	119	-10	2.5%	2.3%	-0.2%	3.5%	3.0%	-0.5%
Urban AC	74	99	25	1.4%	1.9%	0.4%	1.0%	3.0%	2.0%
Southern Gospel	86	98	12	1.7%	1.9%	0.2%	0.1%	0.1%	0.0%
Contemporary Christian	88	85	-3	1.7%	1.6%	-0.1%	1.8%	0.3%	-1.5%
Jazz, New Age	40	64	24	0.8%	1.2%	0.4%	1.5%	2.0%	0.5%
Ethnic	60	54	-6	1.2%	1.0%	-0.1%	0.3%	0.3%	0.0%
Alternative rock	61	51	-10	1.2%	1.0%	-0.2%	1.1%	1.2%	0.1%
Easy Listening	66	40	-26	1.3%	0.8%	-0.5%	0.6%	0.4%	-0.2%
R&B Oldies	32	37	5	0.6%	0.7%	0.1%	0.3%	0.3%	0.0%
Classical, Fine Arts	41	35	-6	0.8%	0.7%	-0.1%	1.2%	1.3%	0.1%
Pre-Teen	18	26	8	0.3%	0.5%	0.1%	0.1%	0.0%	-0.1%
Variety	14	21	7	0.3%	0.4%	0.1%	0.1%	1.0%	0.9%
Gospel	18	18	0	0.3%	0.3%	-0.0%	0.0%	0.0%	0.0%
not available or changing	4	1	-3	0.1%	0.0%	-0.1%	0.1%	0.0%	-0.1%
Silent	137	103	-34	2.6%	2.0%	-0.7%			
<b>Total stations</b>	<b>5177</b>	<b>5276</b>	<b>99</b>						

Stations counts by primary format.  
Formats from the M Street Database October 1995

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

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

The term "ratings" is used to describe the audience figures published in the M Street Radio Directory. However, "audience share" and "audience estimate" are more accurate terms. The published numbers express the size of a station's audience in a theoretical "average-quarter-hour" (AQH) between 6:00 a.m. and 12:00 midnight in two ways: 1) As a percentage of all radio listeners twelve years old or older (12+) and 2) as a number of persons 12+ listening.

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

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



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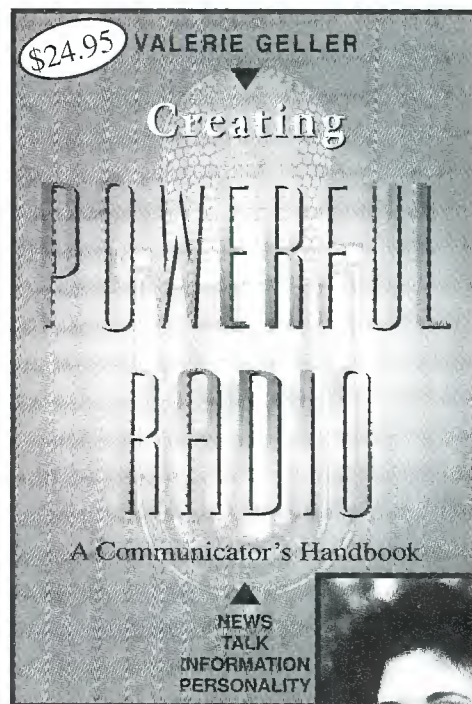
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## UNDERSTANDING RADIO RATINGS

### Remember; They're Only *Estimates*

by Steve Apel

*Steve Apel is the President of Media Perspectives Research Corporation. Media Perspectives provides marketing and audience research along with strategic counseling for broadcasters seeking to maximize ratings and revenues. Prior to founding Media Perspectives, Apel was a Research Project Director at the Arbitron Company and managed research and programming at a number of radio stations. He may be reached at Media Perspectives, 606 Cooper Landing Road, Building A, Suite 4B, Cherry Hill, New Jersey 08002, telephone 609-482-7979.*

#### Ratings Govern Advertising Rates for Many Stations

Commercial radio broadcasters sell listeners.

Although advertisers routinely purchase commercial time in 30 or 60 second increments, it is not the time they are actually buying. What they really acquire from a radio station is access to that station's audience.

The price that a radio station charges for this access depends upon a number of factors. The law of supply and demand plays a role in determining the price of access - stations tend to place limits on the amount of commercial time they will sell. The advertising environment (how the broadcaster schedules commercials within the programming) also affects price. Often, however, the single biggest determinant of price is the size of the audience the station reaches.

Since there is no way of knowing precisely how many people are listening to a given station at a given time, broadcasters and advertisers rely on market research surveys to provide an approximation of this figure.

The audience ratings produced through these market research studies are an approximation because of uncontrollable variations in the kind of people who elect to take part in a ratings survey and in their ability to accurately report their radio listening.

We'll discuss this in greater detail. But before we do, there's a need to take a look at how radio audience ratings are produced.

#### The Methods of Measuring the Radio Audience Can Affect Estimated Audience Size

Nearly all of the estimates of audience for radio stations in the U.S. are provided by the Arbitron Company. Arbitron collects information about radio listening through a diary. This is a booklet in which respondents are asked to write down details of their radio listening over a seven day period. The BBM Bureau of Measurement in Canada also uses a diary. Strategic Radio Research's "AccuRatings" and Willhight Radio Research, which each provide audience ratings in selected U.S. markets, have market research interviewers place telephone calls to people in order to gather information on their radio listening.

#### The "Telephone Recall" Method

In the telephone calls that are placed by Strategic and Willhight, the interviewers inquire about the radio stations that a person listened to in the past twenty-four hours. The accuracy of the information captured through this twenty-four hour recall method is limited. This is because people are being asked to recall specific details of an activity - namely radio listening - to which they're unlikely to have given much thought.

#### The Seven Day Diary Method

A radio listening diary, into which people are asked to enter the names of the stations they listen to when they're listening, could be expected to overcome the limitations of recall and seemingly would be a much more accurate method of gathering listening information. By having listeners complete their diary while listening, details of radio use would not be lost to poor memory as is possible in the recall method. The names of all stations listened to and the exact time spent listening to each radio station would be reported.

Or so the theory goes. In practice, the radio listening diary has flaws.

Keeping a diary for seven days and making a note of every radio station listened to is a rather demanding task. This is a reason why many listeners decline an invitation to participate in a ratings survey. Either they refuse to accept a ratings diary or they accept a diary but fail to complete and return the diary to the ratings firm.

Other radio listeners lose interest in keeping their diary over time. They make detailed diary entries at first but become less detailed in their reports as the week progresses.

Many people appear to complete their radio listening diaries sometime after they actually listen to radio. These people wait until the evening or until the end of the seven day period the diary covers to complete their diary. The resulting entries may be more a measure of awareness of radio station names than details of actual listening.



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The choices people make in whether or not to participate in the ratings survey, whether or not to return a completed diary and the degree of care they take in recording information in their diaries are all sources of error. These errors are one reason why ratings provide only an approximation of audience.

### **Ratings Surveys Which Fail to Represent Everyone Can Distort the Estimate of a Station's Audience**

If all people were alike, gaining a sample of individuals who represent the broader population would be rather simple. However, demographic distinctions such as age, sex and ethnic background are key factors in determining listening behavior and are important to broadcasters.

A ratings survey must represent each different demographic group in proportion to its occurrence in the overall population in order to provide an accurate account of listening. If men are 50% of the population, half of the surveys conducted should be with men. Such perfection is rare in ratings surveys. Most demographic groups are not represented in proportion to their occurrence in the population.

When a demographic group is surveyed out of proportion to its membership in the overall population, the ratings produced can be distorted. In general, audience shares for stations which attract listeners in an over-represented demographic will be inflated while those for stations which tend to attract listeners in an under-represented demographic group will be depressed. For example, a ratings survey with too many men will tend to produce artificially high audience shares for radio stations which have a particular appeal to men.

In an attempt to solve this problem, ratings firms use mathematical formulas to vary the emphasis they place on responses for each demographic group contained in the survey. By multiplying or dividing by a number which adjusts for the degree to which a demographic group is either over or under represented in the survey - a process known as "weighting" - ratings firms theoretically equalize each group's representation.

Although weighting can compensate for some of the error a non-representative sample introduces into ratings it can't solve all problems. One thing weighting can't do is replace missing information. When a demographic group is under-represented in a survey it is impossible to capture as full a range of their radio listening as it is for a demographic group that's either proportionately represented or over-represented.

Radio stations listened to by only a minority of people within an under-represented demographic group may not be reported in the ratings because not enough members of the demographic group were surveyed. For example, if radio station WXXX is listened to by only one in eleven members of a demographic group and only ten

members of that group are surveyed, there is a chance that no one will report listening to WXXX. As a result estimates of the size of the WXXX audience will be depressed.

Ratings firms are not at fault for producing non-representative samples that require weighting. Vagaries of public cooperation are. People in different demographic groups respond to ratings survey in different ways. Most surveys begin with a plan to obtain a representative sample, but some individuals in this sample will fail to take part in the survey. Differences between the people who take part in a ratings survey and those who decline to participate are another reason why the ratings offer only an approximate measure of the radio audience.

In most audience ratings surveys about half of all people who are asked to take part actually participate. While we learn about their radio listening habits, the behavior of the other 50% remains unknown.

It is possible that people who fill out and return a listening diary use radio differently than those who don't. The difference that may exist between the behavior of those who participate in the ratings survey and those who don't is known as "non-response" bias. The high degree of non-response in ratings surveys means that the estimates produced may not accurately represent the radio listening behavior of the population at large.

Even without the sampling and cooperation problems that lead to weighting and non-response bias there still exists the possibility that the answers provided in a radio ratings survey may not be an accurate account of listening.

### **Radio Listeners Cannot Always Tell Us What They're Listening To**

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

Although the people who agree to keep a radio listening diary are asked to make entries in the diary as they listen to radio, nothing guarantees that they will. Evidence suggests that many people make entries in their radio listening diary some time after they actually listen to radio.

A radio listening diary which is completed some time after listening has occurred reports on what people remember listening to rather than what they've actually heard on the radio. Since memory is not perfect, especially in the case of an everyday activity such as listening to radio, people may report listening to the radio stations they are most aware of and fail to mention stations which have a lower profile.



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Even if ratings survey participants make entries in their diaries while listening to radio the ratings produced may not be entirely accurate. This is because ratings surveys depend upon a person's ability to volunteer information on the stations they listen to. People do not always possess the information they are being asked to volunteer.

People don't need to know a radio station's name in order to listen to it. But they do need this knowledge in order to report listening.

Lack of knowledge or confusion over which station is which or a lack of care in completing the diary may cause a listener to supply erroneous information. In ratings diaries people have been known to transpose call letters (calling KXYZ KYXZ for example), invent call sign and frequency combinations that don't exist (a person who listens to both WAAA-FM 99 and WBBB-FM 88 may enter WAAA-FM 88 in the diary), and confuse AM and FM stations with the same call sign (entering KXXX-AM when they in fact listen to KXXX-FM).

### **Ratings Trends Are Likely to be More Accurate Than Single Ratings Surveys**

The many sources of possible error in ratings surveys have to be taken into account when evaluating a station's ratings performance. This is why it is wise to look at the trends in a station's ratings over time rather than concentrating on the results of a single ratings survey. Over time, with repeated surveys, the effects of any of the problems we've talked about tend to moderate. In other words, an error that provides a station with an advantage in one ratings survey is often offset in other surveys.

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## Programming Innovation in the Megapoly Age . . . And Other Fantasies

Commentary by Sean Ross

*Sean Ross is the editor of the four Billboard Airplay Monitor music publications, and can be reached at (212) 536-5264 or by mail at 1515 Broadway, 14th Floor, New York, NY 10036.*

### **Fantasy #1: Imagine WKRP In Cincinnati is taking place now.**

It's now owned by Jacor, since everything else in Cincinnati is. And who better to understand a sitcom than Jacor, which would be operating it as *WLW-3*.

Art Carlson left for a brokerage job years ago. Herb Tarlek is now president of the recently formed Greater Cincinnati River City Mediaworks Radio Group Partnership.

Andy Travis is still there. He's VP/programming of WKRP and its four AM duopoly partners. In an effort to show that he has matured into product manager status, he goes clothes shopping with Herb.

Venus Flytrap left in the early '80s, when minority broadcasters stopped working general market radio with any regularity. The R&B station to which he was exiled at the time has just been bought by its format rival and switched to the Touch.

Les Nessman is long gone, too, following the elimination of news in morning drive. In keeping with the Jacor spirit, however, all references to things swine-related will stay. The turkey drop has become an annual event, too.

Dr. Johnny Fever is regionally syndicated, although his affiliate stations often complain about the lack of a suitable guest host during his multiple stints in rehab and open-heart surgeries. Jennifer has been replaced by voice mail.

Only one aspect of WKRP hasn't changed. It still has only two live jocks, and now nobody condemns that as the only detail of the show that doesn't ring true.

### **Okay, fantasy #2:**

It's a big day for the Hunt family. After years of nagging their parents, Tommy and Larry are finally getting a baby sister. They are, however, aghast when mom and dad return, not with an infant, but the intellectual property rights to a baby sister, Edie, which they have LMA'ed from the Fritz family next door. Tommy has the better grades, but Larry is stronger and more athletic. So, Larry is horrified by the announcement that he'll adopt Tommy's personality. Not, however, nearly as horrified as Tommy, who is told that he'll be filling the hole for a girl in the family.

Oh, alright, the random and capricious swapping of radio stations in this megapoly age isn't quite the same as the trading of people, although most group heads will tell you that their radio stations are only as good as their people, when they aren't firing them. But it's two weeks after the passage of the Telecommunications Bill as I write this, and the initial implications for radio aren't encouraging.

We already know that radio stations will become mere parcels of real estate as the land rush of '96 shakes out, with prospective new owners thinking not of how successful a current station is, but how their furniture will look in the new living room. The WAMO/WXDX Pittsburgh swap that took place on the day the bill passed Congress showed that. So did the KHQT San Jose, Calif., deal that took place last summer. When you buy three stations to add to your existing three, it's impossible that successful, well-executed radio stations won't be sacrificed for the greater alleged synergy of the whole.

That, in itself, isn't the worst thing that could happen, although you will, of course, have a hard time explaining that to the employees sacrificed in such format trading. The early years of duopoly weren't so bad for radio programming: They gave us the modern rock boom, the hot country movement, the '70s oldies format, and the growth of the adult urban and R&B oldies formats. That relatively fertile period of experimentation was prompted not only by the confidence that duopoly gave owners, but by the relative uselessness of owning the third and fourth ACs in the market.

Problem is that most markets got four ACs in the first place because the prices that had been paid for radio stations during the go-go years of the late '80s and early '90s drove everybody into AC. With prices creeping back into that 8 zillion-times-cash-flow area, there's no reason to assume that won't happen again. If you already dominate 25-54, you'll want to use your new stations to lock that demo up. If you've somehow been making money with 18-34, you'll see the new station as an opportunity to expand into 25-54. And if that doesn't mean four ACs (or four country stations) in a market, it could still mean two smooth jazz stations in a market that was perfectly happy with one.



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The best thing you can say about the negative implications of megapoly is that they won't be universal. There are times when the changes resulting from megapoly have made plenty of sense. The Jacor/Heritage swap in Cincinnati in which the market gained a smooth jazz outlet and lost its second classic rock outlet is a winner. So is the new adult standards format on WSAI. As for the further disposition of the Citicasters outlets, time will tell. Megapoly owners operate some very good stations and some very bad stations, and often they do so in the same market.

Megapoly has hastened both the destruction and the revival of top 40. It was a duopoly owner who shunted the top 40 format from WSSX (95.5X) Charleston, S.C., to the lesser signal of an LMA partner where it withered and died. It was a duopoly owner who put top 40 back on WSSX and made it, at this writing, one of the biggest top 40 success stories of recent months. This month, duopoly has brought top 40 back to Fargo, N.D., and taken it away in Bismarck, N.D. This week has seen the sale of Citicasters' top 40s to Jacor; which likes and understands the format; and the sale of Prism Radio Partners, a heavily top 40-based chain, to SFX, which, by many accounts, does not. You get the idea. Megapoly could free top 40 to be itself again; it could also make top 40 the victim of "25-54 disease" in an even bigger way.

One of the best things that could happen from a programming standpoint, for top 40 or any other format, would be seeing more owners specialize by format, not just along the lines of the old RKO or Nationwide top 40 groups but also the format networks in Australia, France, etc. The current station swapping gives everybody a chance to end up with a reasonable facsimile of the stations they really want, although if the goal is to control an entire market, it seems unlikely that owners will restrict themselves to formats they like or understand; one certainly doesn't see that now.

Then again, the concept of national format chains also raises the spectre of satellite networks and the fight that terrestrial broadcasters continue to wage against digital satellite radio. One of the most upsetting spectacles of the 1995 fall NAB convention was the organized lynch mob that passed for a DARS panel, with an NAB moderator lobbying loaded questions at a would-be digital broadcaster while bemoaning the inability of small-market broadcasters to compete with DARS.

There was, of course, no shortage of irony here. One of the panelists was Entercom's Joe Field, whose group had, over the course of the year, turned on new modern rock outlets in Portland, Ore., and Pittsburgh. The Portland station effectively wiped out an AM station that had committed to the format several years earlier, when modern rock was still a boutique format that still scared major broadcasters. The Pittsburgh station was going head up against a suburban FM that had, after years of being a negligible player in the

market, finally found a niche. (Within minutes of Entercom's move, that station was snapped up as a duopoly partner and is now part of the WAMO swap.)

Smaller AMs in major markets and fringe FMs are, in many ways, already more financially disadvantaged than any small-market broadcaster with a relative lock on its market. They can't sell the numbers of their major-market competition. They can't sell the relative exclusivity of a smaller-market outlet. Yet, the irony of having an Entercom crusading for the sanctity of small markets was not apparent to most folks attending the DARS panel. Nor was the irony of at once celebrating deregulation and asking the FCC for protectionism on another front.

All of which tends to suggest that many owners are just as scared of change as the rest of us. (That Entercom was part of the official Johnny Mathis & Deniece Williams campaign against total dereg, so-called because it was "Too Much, Too Little, Too Late," confirms this.) So does the recent attempt by L.A.'s English-language broadcasters to clamp down on bilingual interviewing, gerrymander the market to include more Anglos, and, in general, try to deny the changing demographic nature of their own city. English-language broadcasters' shopping sprees somehow did not include Spanish-language radio, much of which was snapped up in short order by equally canny Spanish-language chains. (Mexico, after all, had duopoly and signal extension networks years before the U.S.) So it wasn't surprising that they too would seek protection from reality.

So far, megapoly is not the end of the world. Although, it may indeed be a good start. One of the problems with making predictions of this sort is that you'll know if they've come true. Trying to put a brave face on a world that may be entirely split between six people by the time you read this is always risky. Let's hope that some of the decisions our new corporate barons make remain risky, too.

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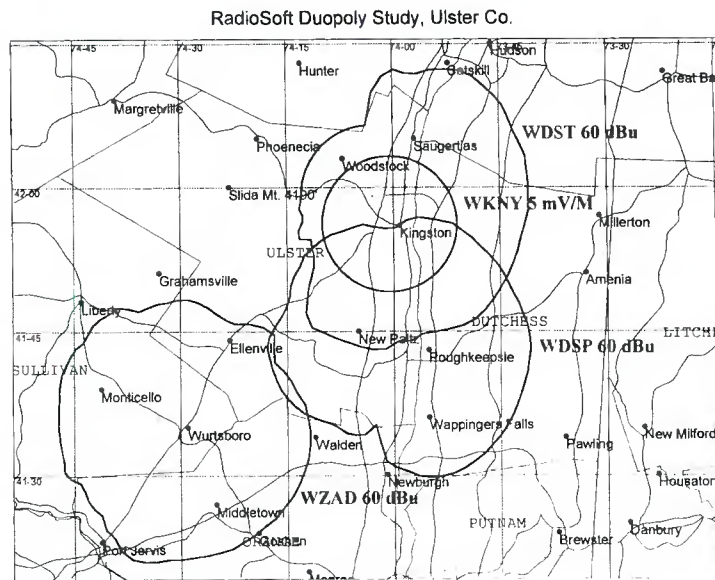
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## FM May Die from the Same Disease that Has Almost Killed AM The Myth of In-Band Digital Broadcasting.

*A Commentary by Robert Unmacht*

A popular myth states that the death of AM radio came from the better audio quality and stereo offered by FM stations. In reality, the death of AM came from poor frequency allocations. Unless we plan for it now, FM may well be the next to go.

Most AM radio stations were allocated to reach people where they lived in the 1940's and 1950's—mostly centered near urban centers or spread out over the nation's farm lands. Low power and directional arrays took care of the city, while clear channels took care of the rest.

As people moved into suburbs, AM stations could no longer cover Arbitron's defined markets—it's hard to keep ratings up in a three or four county metro if you only cover one county. The clear channel stations continued to do well as the power they once used to cover the farmers they now use to cut through the electrical noise of the city and reach the suburbs.

Today, people continue to move further and further from the urban core. Some people in New York and Los Angeles commute up to two hours to work in the city.

FM radio had its allocations set, for the most part, in the 1960's and 1970's. The FCC was able to take into account the suburbs AM stations could no longer cover. However, just as its AM counterpart, today's FM stations find they can no longer cover the markets they were allocated for.

For AM stations, the way to "make due" is to find niche programming or to simulcast an FM station. But what will FM do to continue to be viable in the years to come?

The best way to keep up with the needs of the people is to plan a new, out-of-band digital system that can be better allocated to target the economic and social areas of the country. In-band digital will only perpetuate the out-of-date allocations we live with today. Just like AM stereo was a fix for the wrong problem (audio, rather than coverage), in-band DAB will not, in the long run, save FM from satellite radio. Satellite radio will do what FM in-band digital can not—cover the market place.

Even today, we can see signs that the FM allocation plan no longer works. Over 100 stations are already implementing a short-term fix, adding additional small stations on the fringe of the primary station's coverage area to patch together a more appropriate coverage area for a market. Some recent examples include: KFOG, San Francisco adding KHQT to cover the San Jose market. KMAX, KBAX and KAXX all simulcast in the Los Angeles area to try to cover the market. WRLG and WYYB combine to make one station

in Nashville. Many of the Long Island, New York stations are now simulcast in an effort to cover their market. As the FCC never intended these station to be a "fix" for a larger stations problems, few coverage areas really fit with the primary station to maximize coverage in a given market.

The addition of a second station may not be enough to save many stations. KRTS, a classical station at the southern end of the Houston metro, was not able to adequately cover the market despite the addition of a second 100,000 watt station located in the north end of the metro. The problem that ultimately killed the venture was a lack of downtown coverage in a space between the two signals.

With the elimination of ownership caps, large group owners will be free to buy as many smaller stations as needed to fill in gaps in a primary stations coverage. With owners using small stations to fill a whole, communities will be loosing local service and advertising outlets; larger stations will be putting together an inferior patchwork of signals that will confuse listeners and add unnecessary expense to operations; and a quickly condensing market place will shrink even faster.

As a listener myself, I would much rather tune to one frequency that covers my market than try to remember which of the four frequencies I can hear my favorite station on when I am in a given part of town. If I need to switch to satellite for a system that works, I will. It's not that I am down on local radio, it's just that radio listening should not be something one needs to work at to enjoy. If broadcasters were to think about the future and learn from past mistakes, rather than protecting the status quo, I think they would see that a new digital system that corrects the problems of the past rather than perpetuates them is the way to go.

# The First and Last Word on American Talk Radio.....

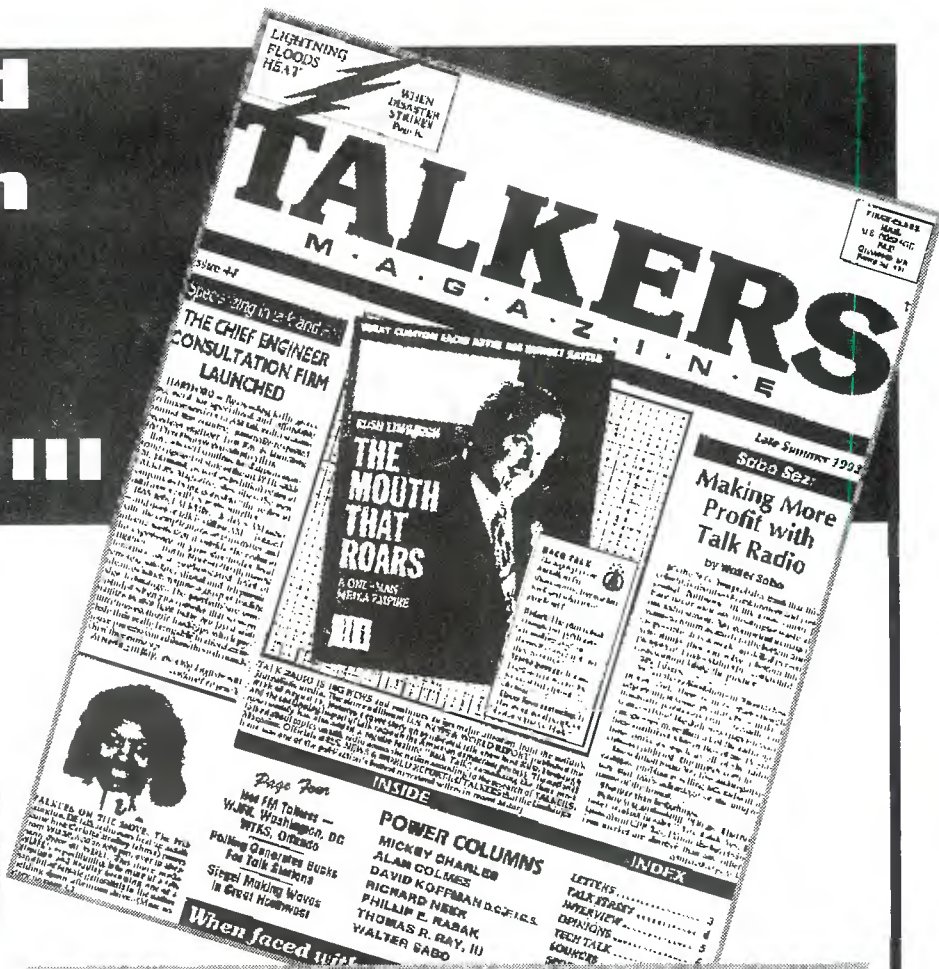
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## No Salvation! A News/Talk Consultant's "No Frills" Thoughts on FM Talk Why It Hasn't Taken Off Like All Those Guys Said It Would

by Valerie Geller

*Valerie Geller is president of Geller Media International, a broadcast consulting firm specializing in News/Talk and personality radio. Her background includes programming WABC/New York, setting up the talk format at KFI/Los Angeles, and various management and on-air positions at stations around the country including: KIOI, KRTH, KOA, KTAR, KOST, and WPLP. Geller currently works in radio throughout the United States consulting stations and conducting "CREATING POWERFUL RADIO" workshops. She also works in news and talk radio in Europe, helping set up the format and shows in Germany, Sweden, Denmark, Finland, Holland, Norway and the UK. GELLER MEDIA INTERNATIONAL can be reached at 212-580-3385 or faxed at 212-787-6279. E-mail [vgeller@aol.com](mailto:vgeller@aol.com) or visit the World Wide Web location through the Internet at <http://www.gellermmedia.com>.*

Are you tired of hearing about radio's hot new format, Talk on FM? (And what to do and who should do it and how to do it and why it works or doesn't work?)

I've worked in talk for years and know talk radio is here to stay, not because it's hot right now, but because it's a great format.

"FM Talk" failed in several top American markets (Chicago, Detroit). In other cities (Los Angeles, San Francisco, Nashville), it's struggling. So why hasn't it worked? There are two reasons: 1) There was not enough time committed to the format. Typically, it takes three years to give the format a real chance. (There are very few exceptions to this)

2) With a quick glance at the stellar successes of Rush Limbaugh and Howard Stern, a lot of broadcasters used the logic, "Okay, talk is hot right now," and decided they could do it too. So, they adopted the format on their FM stations. Their thinking was, "It must be about time to put talk radio on the FM band and go where the audience really is (or at least the younger more coveted demographics are)." It seemed so easy and made so much sense. All you had to do was stick it on FM, right?

Wrong! FM Talk hasn't worked, and it hasn't been because of the FM band. It's because of how it's being done.

Bitterly disappointed that the "latest" thing in radio wasn't as easy as it looked and not immediately gratifying, people gave it a quick shot and then dumped it fast. In their minds, they had good reason. If you haven't worked closely with the format, you are surprised to discover that talk radio is high maintenance, very costly and the listeners actively complain. It's expensive radio, both financially and emotionally. Sponsors bail when they are offended and listeners bail when they are bored. It takes a lot of time, care, talent and promotion to build a talk station.

If you don't have the money or aren't willing to spend it over the long haul of three years, forget the format. Do it right or don't do it at all. The only way to build talk is brick by brick. Get the right talent and the right PD. Give it the time to grow.

How do you find the right people? Again, it's part luck, part timing and a willingness to plunge ahead into hours and hours of hard work.

### Hire Smart

I asked Jim Arcara from ABC Radio what his top ten tips for hiring are. He said, "I only have one, put this ten times: Hire smart people."

Although it's a good thing to have a broadcaster (or a consultant) on hand who knows the ropes, and has been down the talk road before, it's not mandatory for success. Experience in the format doesn't matter as much as creative ability, brains, willingness to risk, and letting go of the ego. (Does it really matter whose idea it was if it works?)

Another thought on this year's bandwagon was "hire a guy from FM to do talk who says he can program great 'morning shows' all day long and just dump the records." That didn't work either. Those music guys were overwhelmed with the format. Oh, they knew how to do formatics, but actually finding talent, working with hosts, developing people, helping the sales department understand the product so they could effectively answer the million questions from clients, and finding the on-air balance between fun, news, reflecting the community and heavy topical discussion eluded them. It was easier said than done.

### Anyone Can Talk

One of the main problems with talk is that it looks so easy. Anyone can talk right?

But it doesn't work that way. Talk talent, like any talent, emerges, develops and grows. It doesn't usually pop up overnight. Talk talent, like a good wine, requires some aging and experience before it reaches that full bouquet. My heart breaks every time I see nervous owners and managers scrutinizing monthly trends or quarterly numbers and dumping talk talent or the whole format as a result.



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If these same managers planted a vegetable garden, they wouldn't be out there 10 days later demanding "Why aren't the tomatoes up yet?"

### **Kick Ass Rock and Roll Talk**

Like anything that's perceived as this month's new flavor, FM talk comes to us with an attitude, a pre-ordained image. I don't know who thought this stuff up but the conventional wisdom on FM talk goes like this:

1) We need to be hip like MTV or Howard Stern, but not vulgar or offensive like Howard, and not music oriented like MTV.

2) It has to be young; 40-55 year old hosts must be too old for this.

3) We have to be outrageous to be noticed in our market

4) We are not afraid to kick ass...(except we don't realistically want to offend anybody, particularly all those nice advertisers who are a bit gun shy of anything controversial...)

### **And then there was Rush...**

Many stations that enjoyed the five or six years of ratings and audience increases even switched formats altogether to take advantage of Rush's phenomenal success. Many are scared right now, finding out if "you live by Rush, you die by Rush."

1995 was not a good year for Rush Limbaugh. Maybe it was too much Rush (overnight and weekend repeats of the show, Rush on TV every night, two autobiographical books that were immediate bestsellers, plus a steady stream of published books and articles about him). And on the air, Rush "got religion" about politics and stopped having so much fun. He took his show to the bully pulpit and listeners found OJ's trial more interesting.

Rush Limbaugh is far from "over" (he ought to do well in this politically-charged election year), but last year, as his numbers dipped, talk station managers were panicking, asking, "What do we do if Rush takes a powder?" And as of today there is still no obvious challenger to the Limbaugh throne.

Here is the answer. If you believe in a show, stick with it. Develop and grow your own talent on the station so that it does not wither away if one show goes south.

News (and News/Talk) radio is one of the most solid and profitable formats in radio. All of the stations that enjoy stability and profit have given themselves time to grow. They are in the format because they liked it, believed in it and knew it was good. They did not pay attention to how "hot" it was or wasn't. These stations have developed fine local talent, and taken a few chances. They understand that talk radio is talent and personality-driven.

Here's the very simple answer. Talk will work on FM if it is *good* radio and it is given *time* to grow.

It *can* work. It *will* work... the same way it does on the AM band.

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## A Tale of Two Stations. . .

### College Radio in the '90s

by Lee Harris

*Lee Harris, a former station owner and manager, is currently "vacationing" as the morning drive anchor at all-news WINS, New York.*

The '90s have been an era of enormous upheaval in the radio industry, with deregulation, duopolies and mega-mergers. Observers of the college radio scene may notice that many student-operated stations continue to cruise along seemingly unaffected by the changes rearranging the "real world". With the exception of slightly different new music, many of these stations sound exactly the way they did in the '70s...uncertain squeaky-voiced jocks working on their chops and technical skills, playing requests for their friends, and engaging in the kind of self-indulgent broadcasting fun seldom permitted in the commercial sector.

But the realities of radio in the '90s are, in fact, being felt by many of these stations, sometimes with surprising results but sometimes with fatal consequences.

Here are two stations' case studies--involving one station that adapted and another that disappeared.

Yale University's WYBC-FM is a rarity among college broadcasters, a commercial radio station. Oddly, many of the Ivy League colleges (Harvard, Princeton, Dartmouth, Cornell and Brown, in addition to Yale) are home to commercial stations, while non-commercial licenses are the rule at lesser schools. Do the smart guys know something the rest of us don't?

WYBC started out as an on-campus carrier current operation in 1941. In 1959, it went FM, serving New Haven, Conn., with the eclectic mix of programming common to college stations all over the country, with a few commercials to help pay the bills. By the early '90s, it became apparent that some commercials here and there were not enough to fund WYBC's continued operation. After years of borrowing operating funds from the university, WYBC had run up a deficit in the hundreds of thousands of dollars. Yale officials convened a panel of experts to decide the future course of WYBC. Taking their cue from lesser educated station operators all over the country, these sages decided to send WYBC kicking and screaming into the '90s.

WYBC, the voice of Yale, became a satellite-fed, digitally automated, urban-formatted partner in a local marketing agreement with a successful New Haven FM. While some purists might find this appalling, it is clear that the arrangement is working out for almost everyone involved, from the University to New Haven's largely black population.

WYBC's local marketing agreement is with WPLR, the dominant FM rocker in the New Haven market. WPLR sells all the advertising on WYBC, and provides operational support. From 2:00 a.m. to 5:00 p.m. most days, WYBC's transmitter and automation system are overseen by WPLR. The satellite downlink for ABC's "The Touch" is actually located at WPLR, as is the "Smartcaster" digital automation. Morning drive news and traffic segments are dropped into the automated programming by an announcer working at the WPLR studios. It's all hands off at the Yale studios of WYBC.

At 5:00 p.m., the folks at WPLR turn off their studio transmitter link, and the volunteer operators at WYBC fire up theirs, taking control of the station for the next nine hours. During these hours, WYBC programs a mix of urban and new rock, handled by a mix of Yale students, and "townies." Relations between stately Yale and New Haven's predominantly black and relatively poor population have been strained over the years. WYBC helps to bridge the yawning chasm in several ways. As the market's only urban FM, WYBC provides the community with its format of choice. By training non-students from the community in the basics of broadcasting, WYBC provides possible career opportunity for future broadcast professionals. Finally, by targeting the urban audience, WYBC provides an inexpensive and cost-efficient advertising vehicle for minority-owned and -operated businesses.

The "Yalies" who volunteer at WYBC (the volunteer mix is about 50% student/50% townie) also reap unexpected benefits. They get positive, productive contact with the locals and a real world education in modern day radio. While not many parents send their kids to Yale hoping they'll become disc-jockeys, the students have their fun and learn lessons about the economy and human relations that may serve them well in their chosen fields.

Those real world lessons about programming, flexible engineering, satellite formats, automation and sales are often completely lacking at the thousands of "standard" non-commercial campus stations around the country. For students working at most of those stations, a radio station is kind of like a big stereo system with a microphone. You play the records you want to hear, and say "hi" to your friends. The problems of playing music you might not like and being dependent on advertising for support are left to those "stupid" commercial stations.

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Still, the real world occasionally catches up with such operations. It happened earlier this year at Adelphi University in Garden City, N.Y. Like WYBC, Adelphi's WBAU started out as a campus-only carrier current operation. Through hard work, perseverance, and the serendipitous demise of a local high school station, WBAU finally obtained an FM license in 1973. Frequencies being hard to come by in the New York area, WBAU was required to share its allocation with Nassau Community College's WHPC.

I was lucky enough to be on hand that night in the Spring of 1973 when WBAU first signed on. I was 16 years old and bicycled the ten miles to the student union building where WHPC's studios were located, having read about the event in the newspaper. After somehow convincing the powers that be that I had been invited, I watched with great excitement as the staff solemnly went about the preparations for the big sign-on. At 9 p.m., the carrier came on, and the national anthem poured out over the airwaves. After the sign on announcement and an official speech about the mission of WBAU, the master control operator spun the first record, "Long Time Coming," by Crosby, Stills and Nash. The opening line, "It's been a long time coming" was perfectly suited to the occasion. On that warm night 23 years ago, no one could have grasped the significance of the last line..."It's gonna be a long time gone."

WBAU operated like many college stations for the next couple of decades, serving as both a training ground and a diversion for students, and providing an outlet for some non-students to broadcast their choice of music. But the fiscally tight '90s caused Adelphi officials to reevaluate the usefulness of WBAU.

The station was primarily funded with \$50,000 from student activity fees. School officials complained that many of the people broadcasting on WBAU were not Adelphi Students and, as the University offered no broadcasting courses, WBAU was of questionable value as a training facility. There were protests, with some WBAU disc jockeys arguing that school officials were simply trying to silence them because Adelphi disapproved of some of the music being broadcast and the image of the university conveyed by the station (WBAU was playing quite a bit of rap towards the end).

In the end, school officials decided that money being spent on WBAU could be better spent elsewhere, so a deal was struck with Nassau Community College for WHPC to take full control of the frequency. The officials noted that, unlike Adelphi, Nassau offered an extensive broadcasting curriculum and even aired a number of college courses, while WBAU offered little in the way of educational programming. Some WBAU staffers talked of challenging the transfer, but the deal went through and WBAU was no more.

Had the WBAU staffers been a little more familiar with the realities of radio in the '90s they might have been able to save their operation. As a non-commercial operation, WBAU didn't have the options open to WYBC, but if the station had been made self-

supporting through grants and underwriting, Adelphi might not have been so quick to pull the plug. If WBAU staffers did consider such options, they obviously did not act on them. By all accounts, efforts to save the station consisted of pleas to Adelphi to keep shoveling in cash.

WBAU was a long time coming, and it will be a longer time gone. WYBC keeps rolling along. Operations manager Wayne Schmidt tells me WYBC is marginally profitable and is slowly retiring its huge debt to Yale. By the way, Schmidt, WYBC's only full-time employee, is not a Yale man. He's a graduate of Eastern Connecticut College. After all, if Mom and Dad are coughing up \$25,000 a year for an Ivy League college, rest assured they don't want to hear about their son or daughter wanting to become a DJ when he or she grows up.



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## The Power of Spanish Radio

by Rosemary Scott

*Rosemary Scott is a San Antonio-based freelance writer who specializes in media marketing.*

### The Demographics

For the first time in history, one in every ten Americans is Hispanic. The United States is the fifth-largest Spanish-speaking country in the entire world with a Hispanic population that is increasing over five times as fast as the general market at large. In fact, our Hispanic population is now larger than the entire population of Canada and, by the year 2000, Hispanics will become our country's dominant minority. Naturally, intense consumer activity is a logical result of this growth and Hispanic purchasing power has never been greater. The most recent statistics place U.S. Hispanic income at \$206 billion before spousal income, which drives Hispanic income up to \$230 billion, a figure more than twice the gross national product of Norway. In short, Hispanics are serious consumers who command a formidable market presence in mainstream American society. When it comes to media usage, empirical research indicates that Hispanics are heavier consumers of electronic media than their non-ethnic counterparts. Hispanics listen to radio for three hours and 43 minutes daily, 26 minutes longer than non-Hispanic audiences. The combination of Hispanic population growth, their ever-increasing economic clout, and their heavy media usage has propelled them into the forefront of rampant consumerism in their unquenchable desire to claim their share of the American dream.

### The Big Picture

To understand the tremendous ratings and revenue success that Spanish radio has enjoyed in years of late, it is important to look at Hispanic-targeted radio from a historical perspective. Kevin Jenkins, former publisher of *Hispanic Media Update*, one of the nation's leading authorities of Hispanic media and marketing information, has compiled research in this field comparing the position of Spanish radio in 1995 to its position in 1970. Jenkins says:

“Let's talk about Spanish radio then and now, 25 years of progress. There are essentially nine important points I will make.

The first is that in 1970, there were approximately 50 Spanish radio stations in the United States. This year there are 426 Spanish stations, according to the *M Street Journal*.

Second, in 1970, there were no quantifiable measurements, meaning that Arbitron didn't really care about it - no one really measured the Hispanic listener. Now, Arbitron has a way of measuring it and AccuRatings does the same thing. They don't have language stratification, but listeners write in the diaries that 'I listen to this station that is Spanish language,' and the diaries are done in Spanish, too, so it's a great opportunity for the individuals to report it.

Third, in 1970, there were variety format stations, meaning stations played everything from Cumbias to South Regional Mexican, they played everything. Now you have more niche-formatted radio stations. For instance, you have Tejano, Salsa, Regional Mexican, Merengue, News Talk, Sports, and so on.

Fourth, in 1970, there was no national representation of Spanish language radio. In 1995, there are major representatives, such as Caballero Spanish Media, Katz Hispanic Media, and Lotus Hispanic Reps.

Fifth, in 1970, there were no wired radio networks. Now there are major wire radio networks such as CNN Radio Noticias, Cadena Radio Centro, and SIS Notisat.

Sixth, in 1970, there were no major Spanish radio owners, by that I mean the Tichenors, Heftel, SBS, etc., and now these are formidable Spanish language operators.

Seventh, in 1970, there were just basically a handful of advertisers, maybe one hundred that were doing sparse efforts in the Hispanic markets. In 1995, there are well over three hundred major advertisers, by this I mean blue chip companies who are advertising in Spanish language radio.

Eighth, in 1970, there was under 50 million dollars spent in the market, and in 1995, there is well over 300 million spent in Spanish radio, i.e., network

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and local radio combined, according to Hispanic Business.

Finally, in 1970, there was no major presence for Spanish radio. In 1995, you have number one stations that are Spanish language in Los Angeles, Miami, San Antonio, El Paso, and the lower Rio Grande Valley according to Arbitron which measures radio blind - they don't look at it just for Spanish, they look at it for what it is, the number one radio station in the market.

### **The Landscape**

During the past five years, Spanish radio has exploded over the FM airwaves. Mac Tichenor, President of Tichenor Media System, Inc. talks about the accomplishments of Spanish radio in the '90s. He says:

“There has been a tremendous ratings success in many major Hispanic markets such as Los Angeles, San Antonio, El Paso, and McAllen-Brownsville.

When we started focusing on the industry in the '80s, you could really be successful in Spanish with just a stand-alone AM station in the market, and now you have to have an FM, which became popular in Spanish in the mid-to-late '80s. Correspondingly, the production for Spanish music became remarkably better during this time.

It's been an evolutionary process, but what I've noticed is that the industry has become more professional. There are fewer Mom and Pop operators and more corporate owners, and what this has done is to raise the level of professionalism in the industry, both among corporate owners and independent operators as well.”

Alfredo Alonso, VP/General Manager of Spanish Broadcasting System, Inc., points out that Arbitron is showing increased listening. He explains:

“As far as the accomplishments go, there's no doubt that Spanish radio has been doing a fabulous job of penetrating Arbitron share in each of its markets. Our marketing ability and programming abilities have increased to the point where we're now vying for the top positions in the number one and number two markets in the United States. Arbitron is showing that we have a lot more listeners than we had in previous years, and we've been able to market ourselves in a more profitable manner.”

Carl Parmer, President of Heftel Broadcasting Corporation says:

“In particular, Spanish radio is obviously centered around the major Hispanic population hubs. In general, it's a very, very healthy business. I think it's similar to what happened to FM in the early '70s in that there is more specialization and this tends to cause higher listening. For example, in a market like Los Angeles where you've had new participants come into the marketplace, Spanish listening is actually up, because the market has expanded as you're able to accommodate different tastes in music. It has increased listening in that particular market and I think that's going to happen in other markets across the country.”

### **Format Fragmentation**

Robert Unmacht, Editor of the *M Street Journal*, points out that although the number of Spanish stations have grown substantially, it hasn't been a breakneck growth due to the fact that Spanish radio stations are now breaking into smaller formats, like the general market. In fact, Spanish stations are not only getting highly specialized in their formats but they are executing high tech presentation in their offerings. Unmacht says, “We didn't even break out the Spanish formats until a little over two years ago. We, like everybody else, just called it Spanish. The difficulty was getting the information on the different breakouts, because we couldn't get the information to do the categorization. That was the problem in the early years, but not anymore. Now people have taken notice and are reporting a lot more accurately.”

According to the *M Street Journal*, there are now 26 subcategories of Spanish radio formats, including General Spanish, Spanish Adult Contemporary, Top 40 Spanish, Easy Listening, Classical, Regional Mexican, Spanish News Talk, Spanish Oldies, Ranchera, Spanish Dance, Contemporary Christian, General Religion, Tejano, Talk, Tropical, Variety, and Primarily Spanish (that mixes with other English language formats), to name a few.

Parmer says, “People are narrowing the way they program, that is they're going for a specific audience with a specific sound...Spanish is a language - not a format, and people make that mistake every day. So just like in English you have a CHR, an AC, a country, a hot country, with all the different variations, it's the same thing in Spanish music. There are many, many different tastes in Spanish music. So as the market has gotten larger, it's enabled the broadcasters to program more specifically for those listeners.”

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Alonso says, "We're trying to get away from what people used to stereotype a Spanish radio station which was a station trying to serve all people and trying to market themselves in a very archaic way. We try not to do that. We try to market ourselves in a very proactive way and, at the same time, find formats which will be accepted in each market."

Tichenor adds, "I believe that much of the recent ratings success of Spanish radio has resulted from stations defining their target audiences more precisely and more effectively serving those narrowed targets. This has led to growth in both cume and time spent listening."

### Money Talks

Hispanic radio is perhaps the single most powerful Hispanic medium in the country. Not only has its ratings success taken the country by storm, but major advertisers are investing mega dollars into this medium as well. Local Spanish radio gross expenditures for 1994 were reported at \$226.7 million by *Hispanic Business*. Local Spanish TV followed at \$213.4 million and local Spanish print trailed at \$135.3 million. These figures demonstrate the impact of Spanish-language radio in the market today. According to *Hispanic Business*, the top 10 Hispanic market advertising and public relations agencies pulled in \$473.2 million in capitalized billings for 1993, a combined 16.3 percent increase over their 1992 billings. Industry insiders think the numbers will only continue to grow now that more corporate advertisers are waking up to the potential of the Hispanic market.

### The Marketing of a Movement

Independent industry analysts talk about the marketing of Spanish radio. Courtney Thompson, President of Broadcast Direct Marketing, says:

"It was enough five years ago, if not fifteen years ago, to be a Spanish language broadcaster. The business just seemed to come because most Spanish language broadcasters had a relative level of exclusivity. Even in Miami, you only had two Spanish language broadcasters until a recent period of years ago. Now, in every market today, there is competition, whether you're in Los Angeles, San Diego, Houston, or Dallas, Chicago, New York, or Miami, in the top Spanish language markets there is serious competition.

The Spanish language broadcasters have, heretofore, basically not been aggressive marketers of their stations. They have basically let the population that would tune in listen to them, and therefore, because they were exclusive, they could claim that they were the Spanish vendor for that market. That no longer is the case. Even as demonstrated by people like the Tichenors who have been traditionally more aggressive than most Spanish language broadcasters in marketing themselves, everybody is finding they have to spend more time in understanding their audience, spending more time in terms of their product and spending money on marketing, which is something they haven't had to do in the past."

Tichenor Media System owns fifteen stations in five markets, and has also recently acquired two Spanish language, 'music-formatted' syndicated television shows. Tichenor says:

"We're in five markets that we own 100% and we own an interest in a sixth market. Our goal is to be in each of the top ten Hispanic markets - We're in five of them, with plans for expansion. Every TMS property is the number one Spanish station in its market.

Our mission statement describes our marketing philosophy: We're committed to being the premier marketing company dedicated to serving Hispanics, and we are going to satisfy our customers and our listeners beyond their expectations. What we're committed to doing is going all out for our listeners and our customers, and we know this will continue to deliver ratings on our stations and results for our advertisers."

Heftel went public in July of 1994, and now owns sixteen stations in six markets: Los Angeles, Miami, New York, Dallas, Chicago, and Las Vegas. Parmer discusses Heftel's marketing objectives and says, "We're public, we clearly want to dominate the markets we're in, and want to be a major player and a leader in terms of how we want to serve community and rate structure in that community as well." Spanish Broadcasting System owns seven stations in three markets.



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Alonso discusses the marketing philosophy of Spanish Broadcasting System. He says:

“SBS is by far the largest Spanish-owned broadcaster in the United States. We’re the only company that owns AM and FM properties in the three largest Hispanic markets being L.A., New York, and Miami. We own seven radio stations in all, and we’d like to expand from the markets that we exist in today, to Chicago and San Francisco which are the fourth and fifth-largest Spanish markets. We’d like to expand our share by expanding our company into (these) other markets. The only market where we’ve had the market to ourselves is New York. Heftel doesn’t do much of anything.

In Los Angeles, we compete heavily with Heftel. They have KLVE, and over the last two books, they’ve been able to compete so there we’ve seen competition from them. I think it’s good for us, because if you have a number of (Spanish) stations that are in the top ten, it just gives credibility to the Spanish radio industry. For us, we were always the leader. KLAX [Los Angeles] going to one in a top ten market, but now for KLVE vying for that top position, it definitely makes LA look like a market where Spanish properties should be viewed as a general market entity. In Miami, the arena is influenced by the Spanish population, so there’s no doubt that Miami has been able to position itself as a key entity.”

### The Future

As technology has continually evolved, major changes have occurred in the Spanish radio industry and Hispanic radio is now on the forefront of a new frontier. Perhaps the most profound transformation in the industry has been influenced by new legislation which enables companies to own as many as four AMs and four FM stations in any given market. Monolith corporations have taken advantage of this law and the result has been pure and simple consolidation.

Parmer says, “Clearly duopoly is going to cause some consolidation which I think will be healthy for the business. I think that it’s the broadcasters going forward to being able to provide more research, more information for the clients so that they learn not only how to use it, but the best way to use it, and the underlying need to use it. So I think what will happen is, as you go forward, the operators who have a critical mass will be able to provide services

to the advertising community and to the client which will enable them to better understand why they should be using the medium. That’s something that’s been missing, really just because of the fragmented nature of the business.”

Alonso talks about future growth in the Spanish radio industry, which he believes is inevitable. He explains, “I think you’ll definitely see growth in markets where maybe today you don’t have such dominant positions. In the future, I think there’s going to be a lot more growth.”

Thompson observes, “The edge of the ‘90s and into the year 2000 where the difference will be made with the Spanish language broadcasters will be how well they market their stations to their audience after they’ve fine tuned their product.”

Tichenor says, “If you look at the size of Hispanic radio companies in this country just within the last two years, we’ve gotten much bigger and I think that will continue.”

He concludes, “In the future, the folks who are committed to serving Hispanics, who satisfy their customers and listeners expectations will deliver ratings on their stations and results for their advertisers. They are the ones who will stay on top.”



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## 1995 FCC Overview

by Gregg P. Skall

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The 1995 broadcasting year saw major changes in communications law and policy affecting radio broadcasting and significant proposals for further changes. Perhaps the most far reaching proposed changes came from the U.S. Congress which completed the most significant rewrite of the Communications Act since 1934.

### Telecommunications Legislation

The Telecommunications Act of 1996 deregulated virtually every area of communications technology. For the first time, the Act addresses regulation of the Internet and other on-line services of interest to broadcasters. The principal radio broadcasting issue dealt with by the act is the revision of the radio ownership limits.

### OWNERSHIP ISSUES

**Radio Ownership** -- The Act eliminates the current limit upon the number of stations that can be under common ownership or control nationally. Local ownership is substantially relaxed according to market size (which will continue to be measured by commercial contour overlap) to permit the following:

- in markets of 14 or fewer stations: up to 5 total (but no more than half of the stations in the market) and no more than 3 in the same service (AM or FM);
- 15 to 29 stations: up to 6 total, 4 in the same service;
- 30 to 44 stations: up to 7 total, 4 in the same service;
- over 45 stations: up to 8 total, 5 in the same service.

The Act authorizes the Commission to override these limits if it determines that the result would be an increase in the number of stations in operation.

**Alien Control** -- The act also modified the old standard of alien ownership found at Section 310(b) of the Commission's Act by removing the restrictions on licensee or parent corporations having foreign officers or directors.

**Further FCC Review of Rules** -- The Commission is required to review its broadcast ownership rules every two years in light of competition and is to repeal or modify any rule which it determines to no longer serve the public interest.

### LICENSING

**Term** -- The radio standard license terms is extended to 8 years, subject to short-term renewal sanctions where appropriate. A license is to terminate automatically if a station is silent for one year.

**Procedures** -- The Act prescribes a renewal procedure that precludes competing applications. A renewal application must be granted if the FCC finds (a) that the station has served the public interest, (b) the licensee has not committed any serious violations of the Communications Act or FCC rules, and (c) other violations of the Act or rules, taken together, would not constitute a pattern of abuse. (Although it would seem that this procedure perpetuates the current strong presumption of renewal expectancy, the vagueness of the first standard may afford the Commission considerable flexibility.) If the standards are not met, a renewal application may be denied after hearing or granted subject to terms and conditions. Only after denying renewal may the Commission accept applications for the forfeited facilities. These new procedures apply retroactively to all renewal applications filed after May 1, 1995.

**Applications** -- The Act specifically bars the Commission from requiring renewal applicants to file information previously provided or which is not directly material to the renewal.

Despite constant descriptions of the Act as comprehensive, it merely amends, but does not replace, the Communications Act of 1934. In most day-to-day operational respects, the relationship of broadcasters to the FCC will remain "business as usual."

### FCC ACTIONS

Recognizing that the 1996 Act left it no discretion and that public notice and comment would serve no purpose, the Commission implemented the broadcast ownership provisions without a notice and comment period in early March, 1996. The Commission also took the opportunity to confirm certain of its own ancillary and interpretive rules with which it will apply the new ownership provisions.

**Local Radio Station Ownership** - The Commission revised Section 73.3555(a) of its rules to track the legislative local multiple ownership limits. In addition, it has restated the following principles which are unaffected by the 1996 Act which will remain in effect to interpret the new rules:

- The relevant radio market will continue to be defined as the area encompassed by the principal community contours of overlapping stations proposing to have common ownership. The principal community contours are the predicted or measured 5 mV/m contour for AM stations and the predicted 3.16 mV/m contour for FM stations.
- The number of stations in the relevant market will continue to be determined based upon the principal community contours of all operating commercial full-power stations whose principal community contours overlap or intersect the principal community contours of the commonly-owned overlapping stations.
- Daytimers and foreign stations will continue to be included in the count. Non-commercial stations, translators and non-operational stations will continue to be excluded. Stations will be considered non-operational if they have received construction permits but have not yet begun program tests, or if they have gone off the air and have been silent for more than six months. However, the principal community contour of a non-operational commercial station that is part of a transaction or that is commonly owned by a party to the transaction will be counted, both to define the relevant radio market and to determine its market size tier.
- Stations in the same market that are subject to time brokerage agreements involving more than 15 percent of the brokered station's programming per week will continue to be treated as if the brokered station were owned by the brokering station.

**National Radio and TV Ownership** - The 1996 Act eliminated all limitations upon the number of broadcast stations that a person or entity may directly or indirectly own, operate or control on a national basis. The only remaining restriction limits the national audience reach for commonly-owned, -operated or -controlled television stations to 35 percent. The Commission has eliminated Section 73.3555(e)(1) of its rules and has revised Section 73.3555(e)(2) accordingly.

#### **Regulatory Fees**

In June, the Commission issued a Report and Order setting the annual regulatory fees for 1995. Those fees range from \$250 for a Class C AM radio station to \$1,120 for a Class A AM or Class C, C1, C2 or B FM station. The Commission rejected an earlier proposal to assess different regulatory fees upon stations depending upon whether they are within an Arbitron market. Rather, it adhered to its previous approach of assessing the same fee on all stations without regard to market size. Rather than staggering the dates for payments, it established September 20 as the due date for all stations. The Commission also added a new fee of \$170 for FM boosters and translators which had been inadvertently omitted from the 1994 schedule. Fees must be paid for all facilities owned as of October 1, 1994. However, the party responsible for the fee is the party who is the licensee as of September 20, 1995.

Although the comment deadlines have passed, this rulemaking proceeding is likely to be rendered moot by the revisions proposed by the House and Senate for the Communications Act of 1934.

#### **Indecent Programming**

After three unsuccessful attempts to establish a "safe harbor" for indecent programming, the Commission won court approval in July to restrict such programs to the hours of 10:00 p.m. to 6:00 a.m. and to ban indecency over the air at all other hours. The Court of Appeals for the District of Columbia ruled 7-4 in favor of the Commission.

The Court of Appeals validated the Commission's definition of indecent programming as: "Language or material that, in context, depicts or describes, in terms patently offensive as measured by contemporary community standards for the broadcast medium, sexual or excretory activities or organs." Further, the Court upheld the Commission's definition of "children" as those under 18 years of age.

The decision validates fines exceeding hundreds of thousands of dollars it has levied against broadcasters, principally Howard Stern, for alleged indecent programming.

#### **Unattended Operation**

In December, the Commission issued its long awaited *Notice of Proposed Rulemaking* to permit unattended operation of broadcast stations. Under present rules, all radio broadcasting stations must be operated by a licensed transmitter duty operator at either the transmitter site, a remote control point or an Automatic Transmission System (ATS) monitor and alarm point. Recognizing that advances in automation technology may have made it no longer necessary to have a full-time duty operator, the Commission proposed to eliminate the requirement altogether.

However, the Commission emphasized that licensees remain fully responsible for adequately monitoring their technical operation and adjusting and maintaining their stations in compliance with all technical rules. In requesting comments, the Commission expressed its concern that the elimination of duty operators might encourage negligence or irresponsibility and therefore, it also considered restricting unattended operation to only ATS-equipped stations since an ATS station may cease broadcasting automatically if a technical problem is not remedied within a short time. Of particular concern to the Commission is responsibility for tower lighting and EBS monitoring.

In conjunction with the primary proposal, the Commission also sought comment on a number of related rule changes regarding its requirements to adjust transmitter, monitor and extension meters, establishing a new requirement for a reliable contact person, and restricting the time within which an out-of-tolerance condition can continue pending appropriate corrections.

#### **New Emergency Alert System**

In December, the Commission released its long awaited Report and Order replacing the Emergency Broadcasting System (EBS) with a new Emergency Alert System (EAS). Embracing digital technology and automation, the new EAS is intended to be far more flexible,



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reliable and useful, while less intrusive than EBS. Key personnel of every broadcast station should familiarize themselves with the new rules, which comprise an entirely new Part 11 of the FCC's Rules, and replace Section 73.901 through 73.962 of the current FCC Rules.

The following is a summary of the new EAS:

**Participation.** All broadcast stations will be required to have EAS decoders. All but Class D non-commercial FM stations and low power TV stations will also be required to have an EAS encoder installed in their broadcast chain. A station may opt out of the full EAS program, in which case it would sign off the air after receiving an alert and broadcasting an appropriate announcement. Impressed with the potential use of radio broadcast data system (RBDS) technology to provide individual receivers with a wealth of specific information and to turn on inactive receivers in the event of an emergency transmission, the FCC is encouraging stations with RBDS on their subcarriers to utilize that technology to provide emergency warnings.

**Mandatory Protocol.** An EAS activation message will consist of a digital header, an attention signal, an audio or text message and an end of message (EOM) code. The header will define who originated the emergency message, and its nature, location and valid time period. The nature of the emergency must be one of 32 "event codes," which will provide local authorities and stations with flexibility in determining how to react. The location parameters can be for events affecting as wide an area as a whole state down to specific neighborhoods, blocks or even individual homes (but only if local authorities devise such codes).

**Equipment Requirements.** Current EBS equipment must be replaced. To encourage innovative design, the Commission has not prescribed specific equipment, but has simply required that all EAS equipment be capable of performing the functions described in the new rules. All such equipment must be certified by the Commission. An important feature of EAS decoders will be an ability to be programmed so that licensees can select certain state and local originators, and event and/or location codes in order selectively to interrupt programming, and establish priorities. (Reaction to an EAS national level emergency is mandatory.) Visual displays of received codes would enable the operator to determine an appropriate response.

**Monitoring Requirements.** Recognizing the unreliability of the current "daisy chain" system, the Commission will require at least two audio inputs on the EAS decoder. Specific monitoring assignments for EAS participants will be delineated in state and local area EAS plans. These will be developed voluntarily by state emergency communications committees (SECCs), subject to FCC review.

**Automation.** EBS requires live monitoring. EAS will permit each broadcaster to determine whether to use automatic or manual operation to send or receive EAS alerts. Stations which choose to be unattended (see discussion above) will require EAS equipment that is both automatically operated and protected with a device to prevent unauthorized access. When in use, automatic operation must provide full interruption of programming and transmission of EAS messages for national matters and required tests, as well as pre-selected state and local area emergencies. Stations operated by remote control must use

automatic EAS operation if direct monitoring of the assigned EAS sources will not be possible at the remote location.

**Test Requirements.** The Commission will require both monthly and weekly tests. All tests will be coordinated among area stations and must be transmitted within 15 minutes of receipt. The required monthly test will involve transmission of digital codes, at least eight seconds of the attention signal, a test audio script and an end of message code. The schedule and script will be developed by SECCs. The script itself may be customized to describe local involvement and may include live messages from local officials. Foreign language stations may translate the test script for the benefit of their audiences. The weekly tests to be run in other weeks of each month will be "unobtrusive," consisting only of the EAS and EOM codes, and should not significantly interrupt programming.

**Commercial Sponsorship.** The Commission will permit the use of PSAs or commercial sponsorship for announcements or infomercials explaining EAS to the public. These announcements may be run at any time, but they cannot be a part of the actual test or activation and may not simulate or attempt to copy alert tones. If the announcement is run near the time of a test, it must be done before the EAS digital header code or after transmitting the EOM code.

**Logging.** Each test and activation of the EAS must be recorded in the station log. If a required test or activation is not received, the cause must be determined and logged as well.

**Maintenance.** If a station's EAS encoder or decoder becomes defective, the station may operate pending its repair or replacement of such equipment for up to 60 days without specific FCC authority. The dates and times of equipment removal and restoration must be recorded in the station log.

**Documentation.** All stations will be required to have an EAS Operating Handbook, to be provided by the Commission, at normal duty positions or EAS equipment locations. Until the EAS is fully in place, all radio stations will also be required to have an Authenticator Word List, to be issued by the Commission annually; additional authentication materials will be provided to specified control points.

**Implementation.** On July 1, 1995, existing two-tone decoders were to have been modified to be capable of responding to a shortened eight second two-tone signal. Between July 1, 1995 and July 1, 1997, stations may transmit the shortened two-tone signal for not less than eight nor more than 25 seconds. Until July 1, 1996, the new EAS equipment will be optional for broadcasters. During a July 1, 1996 to July 1, 1997 "debugging" period, EAS equipment will be required but old EBS equipment must also be retained and kept operational. After July 1, 1997, the old two-tone signal will be used only as an actual alert and not for testing or interstation signalling. The Commission has entertained the possibility of waivers of EAS requirements based upon a showing of financial necessity, the number of other entities serving the area and the likelihood of hazardous risks to the applicant's listenership.

The current Emergency Broadcasting System (EBS) and its predecessor, the "CONELRAD" system (established in 1951), were developed and refined periodically to deliver warnings to Americans



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throughout the country. The system was first designed to give the President access to broadcast audiences during national emergencies. EBS has evolved instead and been used extensively for the delivery of local and regional emergency information.

To adapt the EBS procedure to the new optional 8-second alert signal, the Commission released a specific script which was designed to permit the weekly tests to be contained within a 30-second slot.

### Minority and Female Ownership of Mass Media

For nearly two decades, the FCC has expressed its concern that it needs to promote minority and female ownership of mass media. In January, the Commission released its *Notice of Proposed Rulemaking* ("Notice") regarding methods to increase minority and female ownership of the mass media. At the outset, the Notice reiterates Chairman Reed Hundt's concerns that the representation of minorities and females among broadcast station owners remains "far below" their presence in the national population and the civilian workforce. The Commission notes that since it adopted its distress sale and tax certificate policies in 1978, minority ownership of broadcast facilities has increased from less than 1% to 2.9% while the minority population increased from 20% to 23%. The Commission said there is similar under representation of women.

Currently, the Commission has no policies to advance female ownership. Policies it adopted in 1978 had it award a preference for females in comparative hearings for new broadcast facilities, but the Court of Appeals for the District of Columbia Circuit overturned that provision on the ground that there had been no showing of a connection between female ownership and a diversity of programming. While, if adopted, the proposed rules would incorporate women into the Commission's proposals, it cautions that it has not prejudged the issue and that it would need to demonstrate how female ownership will contribute to diversity if such rules are ultimately adopted.

The tax certificate, claimed by many to be the Commission's most successful tool in bringing minorities into the ranks of broadcast station owners, was adopted in 1978 to provide tax benefits to those who sold stations to minorities. While the tax certificate did not allow the seller to avoid tax, it did allow the deferral of gain recognition provided the seller reinvested its profits in another "like kind" property or used the profit to reduce bases in other like kind properties already owned. In 1995, however, the Commission's authority to issue tax certificates was repealed by Congress.

The Notice proposed five areas for modification to improve minority and female ownership:

- Incubator programs. The incubator program would provide further relaxation of the radio multiple ownership rules for licensees who provide technical and financial assistance to minorities and small businesses seeking to enter the mass media. Under the Commission's tentative proposal, an incubator program would have to provide: (1) substantial financial assistance; (2) operational assistance; and, (3) training programs for new broadcasters.

- Modification of ownership attribution rules. The Commission proposed to modify the ownership attribution rules to assist minorities and women in raising capital. It would do this by not recognizing ownership interests of other investors where more than 50% of the voting stock of a corporate licensee and at least 15% of the equity are held by minorities and/or females.
- Expansion of the Tax Certificate Policy. The Commission proposed various ways to expand the now-defunct tax certificate policy.
- Other means to enhance minority and female ownership. The Commission sought comments on proposals to provide investment tax credits to investors and minority controlled entities, proposals to streamline the application process for SBA-licensed small business companies providing financing to minority-controlled applicants and a proposal to allow minority-controlled entities to own more than the normally allowed number of broadcasting stations.
- Information collection. The Commission sought comments whether it should revise its annual ownership form to require disclosure of the race, ethnicity and gender of owners in order more adequately to obtain current statistics on minority ownership.

Clearly, the pending revision of the Communications Act of 1934 would make moot most of the Commission's proposals regarding minority and female ownership. It remains to be seen what the Commission will do in this area following Congressional action on the Communications Act.

### FCC EEO Initiatives

In October, 1994, the Commission reported to the Congress on its EEO efforts and made recommendations to improve equal employment opportunities in broadcasting. Stating first its finding that broadcast EEO efforts have been largely successful, it also noted that in almost every category, and particularly in upper-level ones, the increase in minority and female employment outpaced the growth of women and minorities in the overall national workforce, despite a significant decrease in broadcast employment. Nonetheless, it found that the percentages of women and minorities in the broadcast industry in 1993 remained below the comparable figures for the overall national workforce. To remedy this shortfall, the Commission believes that its focus should remain upon the extent to which licensees seek out and recruit women and minorities whenever job vacancies exist.

The Commission listed and characterized as legitimate a number of concerns raised by commentors concerning current EEO obligations and enforcement. These include the following:

- The difficulty of obtaining referrals in small markets and/or by stations with small staffs.
- The treatment of part-time employees.

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- The use of joint recruitment efforts to attract qualified minorities and females.
  - The use of technological advances to ease the administrative burdens on broadcasters of preparing reports on EEO efforts.
  - Revisions to renewal applications to provide additional information on minority recruitment.
  - Annual EEO report revisions to provide additional information.

### **Affirmative Action**

In June, the United States Supreme Court released the much awaited decision Adarand Constructors, Inc. v. Peña. The Adarand case dealt with the affirmative action program of the Department of Transportation which gave a prime contractor a financial incentive to hire sub-contractors certified as small businesses controlled by socially and economically disadvantaged individuals. The program requires the contractor to presume that such individuals include minorities or any other individuals found to be disadvantaged by the Small Business Administration (SBA). The Adarand decision held that all affirmative action programs which utilize racial classifications, imposed by federal, state, or local government must be analyzed by a reviewing court under a strict scrutiny test. The Court specifically disavowed Metro Broadcasting, which had upheld race based policies of the Federal Communications Commission against a Fifth Amendment challenge. However, the decision did allow that mere outreach efforts by government agencies may not necessarily be subjected to the strict scrutiny test.

The Adarand decision has thrown into doubt all of the Commission's minority and female programs and, to some extent, its EEO program. The EEO program, however, may be deemed to be an outreach type of program. The Commission is continuing to enforce its EEO program and it must continue to be treated seriously.

### **Political Broadcasting**

Just before the November general elections, the Commission released two decisions concerning political broadcasting. In the first, it held that stations are not required to sell non-standard length programs to federal candidates unless they have made such time available to any advertiser within the past year. In doing so, the Commission held that a licensee cannot be required to make available to federal candidates advertising or programming time in increments it had not made available to commercial advertisers during the previous 12 months.

In a separate decision, the Commission refused to reconsider its earlier ruling that television stations are only required to have a visual sponsorship identification for political advertising.

Purge of 1992 Political Files. With the general election approaching, broadcasters should remove all materials for any general, primary, runoff or other election held on or before the November 1994 election from public files unless there is a pending complaint or investigation. If the station desires, these materials may be retained for internal purposes, but they are no longer under an obligation to make them available to the public.

