MBR Stats
Steady as she goes?
Network radio bounces back.

News in Review
Is Rush falling behind?
New study leads to more studies.

Programming & Positioning
No bull: Business radio provides groups with a new niche.

REMOTE JACKPOT
with a COMREX HOTLINE

Uses one plain old telephone line — no antennas to set up and no digital lines to install.

Save on staff — even a weekend board-op can use a Hotline. It's that easy!

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Digital Audio Delivery systems are now recognized as a must for every broadcast facility. But few systems provide the features, flexibility or reliability required to maintain profitability in this demanding and fault critical application, nor the support mechanism to maintain them.

The ENCO DADPRO32 Digital Audio Delivery System is simply the most powerful On-Air & Production system available. Based on the already widely accepted and mature DADPRO product, but now optimized for the Windows NT operating system, DADPRO32 is unique in its uncomplicated user interfaces and adaptability to any format, yet harnesses the power and reliability of proven technology.

- Intuitive On-Screen User Interfaces that are immediately familiar to operators. Optional Touchscreen makes Live Assist operation quick and easy.
- Complete On-Air flexibility for Live Assist, Automated, or Satellite Programmed operations, with transparent transitions between modes. Seamless Segues and Voice Tracking provide a continuously “Live” image.
- Powerful Production and Call Processing capabilities, including Graphic Cut & Paste Assembly Editing. Automatic Recording features are included for catching network feeds.
- Interfaces to all Music and Traffic Scheduling and Billing systems.
- Features full 32-Bit Processing and True Multitasking capabilities. Many third party programs, such as Multitrack Editors, Wire Capture systems and Word Processors may be directly embedded into DAD, or operated on the same Workstation.
- Inherent support of Global Wide Area Networking, for sharing of data between multiple facilities. Ancillary products are available for Store Forward operations and remote management of unmanned downlink sites.
- Operates on commonly available “off-the-shelf” computer hardware and network architecture, utilizing any of a wide variety of redundancy configurations.
- DAD is an outright purchase, and there are no monthly licensing fees. Free software upgrades are provided for the first year. ENCO technical support is legendary as the best in the business.
Consolidation Stabilizes; Revenues Keep On Truckin’

Statistically speaking, radio is stable. Revenues continue to build on the exceedingly solid foundation established in each of the last two record-breaking years. Because last year in particular was so good, increases are less than dramatic. However, radio’s sales force would be doing well simply to hold ground won; the fact that revenues continue to advance is good news.

Consolidation has definitely hit a lull. For the first three months of this year, transactions reported by RBR totaled $1.76B, a far cry from $4.32B for Q1 1997. The final touches are still being put on mega-deals struck last year: CBS/ARS, Jacor/Nationwide and the splitting of SFX between Capstar and Chancellor are all nearing completion. Newcomer Cumulus Media has been moving fast in smaller markets, but even they seem to have taken a breather.

— Dave Seyler

Radio Revenue Index

February Revenues Up 6%

By recent radio standards, February was a humdrum month. Sales forces were only able to outbid January 1997 by 6% (local sales were up 5% while national gained 9%). Part of the reason was that February 1997 was one of the gangbuster months of that year, registering a 12% gain over 1996. The extent of consolidation for each market segment.

LMA, duopoly or superduopoly. The “percent” column shows the extent of consolidation for each market segment.

Local & Nat’l Revenue February 1998

All Markets 6%

Jan-Feb 1998

Local & Nat’l Revenue Jan-Feb 1998

All Markets 7%

Superduopoly Dimensions

Industry Consolidation

(as of April 20, 1998)

Superduopoly: 45.4%

Market # of stns percent
1 to 50 697 48.5
51 to 100 515 48.6
101 to 150 335 41.6
151 to 200 365 44.0
201 to 261 331 41.0

All Markets 2,244 45.4

Total Industry: 69.5%

Market # of stns percent
1 to 50 1,042 72.5
51 to 100 763 72.0
101 to 150 523 65.0
151 to 200 568 68.4
201 to 261 540 66.7

All Markets 3,436 69.5

Note: The “# of stns” shows the total count for stations in either a superduo or, in the case of total industry consolidation, in an LMA, duo or superduo. The “percent” column shows the extent of consolidation for each market segment.

MBS Stats

Non-Traditional Revenue Track
Food/Grocery dominate February NTR

<table>
<thead>
<tr>
<th>Category</th>
<th>Jan</th>
<th>Feb</th>
<th>YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automotive</td>
<td>23.04</td>
<td>17.54</td>
<td>19.93</td>
</tr>
<tr>
<td>Food/Grocery</td>
<td>21.57</td>
<td>33.70</td>
<td>28.44</td>
</tr>
<tr>
<td>Leisure/Electronic</td>
<td>24.42</td>
<td>14.15</td>
<td>18.61</td>
</tr>
<tr>
<td>H&amp;B</td>
<td>3.11</td>
<td>7.82</td>
<td>5.78</td>
</tr>
<tr>
<td>Home Imp.</td>
<td>7.72</td>
<td>12.45</td>
<td>10.40</td>
</tr>
<tr>
<td>Office</td>
<td>17.58</td>
<td>12.25</td>
<td>14.56</td>
</tr>
<tr>
<td>Clothing</td>
<td>2.56</td>
<td>2.10</td>
<td>2.28</td>
</tr>
</tbody>
</table>

% of vendor/new business by category

Source: Revenue Development Systems, based on revenues from 76 stations in 32 markets.

State Format Preferences

Only one format can be the most popular in a given state. One way to compare formats is to see how many states each one "wins." It should come as no surprise that Country is a clear winner, being the format of choice in 20 states. However, it comes in third in terms of total listeners. A quick glance at the states in the News-Talk victory column shows why this is true. While Country carries Texas and a bunch of little guys, News-Talk is making waves with New York, California, Pennsylvania, Illinois, Michigan—in short, it does not take a rocket scientist to figure out how this would go down in the Electoral College.

Audio on the Internet

<table>
<thead>
<tr>
<th>Format</th>
<th>Stns</th>
<th>Pct.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-commercial</td>
<td>88</td>
<td>13.5%</td>
</tr>
<tr>
<td>Country</td>
<td>57</td>
<td>8.7%</td>
</tr>
<tr>
<td>Religion</td>
<td>54</td>
<td>8.3%</td>
</tr>
<tr>
<td>Rock</td>
<td>52</td>
<td>8.0%</td>
</tr>
<tr>
<td>News/Talk</td>
<td>47</td>
<td>7.2%</td>
</tr>
<tr>
<td>CHR</td>
<td>43</td>
<td>6.6%</td>
</tr>
<tr>
<td>Sports</td>
<td>34</td>
<td>5.2%</td>
</tr>
<tr>
<td>Classic Rock</td>
<td>31</td>
<td>4.7%</td>
</tr>
<tr>
<td>AC</td>
<td>28</td>
<td>4.3%</td>
</tr>
<tr>
<td>Hot AC</td>
<td>26</td>
<td>4.3%</td>
</tr>
<tr>
<td>Alternative</td>
<td>27</td>
<td>4.1%</td>
</tr>
<tr>
<td>Talk</td>
<td>25</td>
<td>3.8%</td>
</tr>
<tr>
<td>Oldies</td>
<td>23</td>
<td>3.5%</td>
</tr>
<tr>
<td>Adult Altern</td>
<td>23</td>
<td>3.5%</td>
</tr>
<tr>
<td>Ethnic</td>
<td>15</td>
<td>2.3%</td>
</tr>
<tr>
<td>Urban</td>
<td>14</td>
<td>2.1%</td>
</tr>
<tr>
<td>Soft AC</td>
<td>14</td>
<td>2.1%</td>
</tr>
<tr>
<td>News</td>
<td>11</td>
<td>1.5%</td>
</tr>
<tr>
<td>Standards</td>
<td>10</td>
<td>1.5%</td>
</tr>
<tr>
<td>Classical</td>
<td>9</td>
<td>1.4%</td>
</tr>
<tr>
<td>New AC-Jazz</td>
<td>8</td>
<td>1.2%</td>
</tr>
<tr>
<td>AC-Spanish</td>
<td>5</td>
<td>0.8%</td>
</tr>
<tr>
<td>Talk-Spanish</td>
<td>4</td>
<td>0.6%</td>
</tr>
<tr>
<td>CHR-Spanish</td>
<td>3</td>
<td>0.5%</td>
</tr>
<tr>
<td>70's Oldies</td>
<td>1</td>
<td>0.2%</td>
</tr>
<tr>
<td>Easy List</td>
<td>1</td>
<td>0.2%</td>
</tr>
</tbody>
</table>

Total 1,252 100.0%

Network Audiences Hold Steady

Network audiences were down a mere 0.4% to 22.3M. In the latest RADAR 56 (Fall '97), holding steady after audiences surged 7.6% in RADAR 55 (ABR/159/97, p. 7). That puts audiences about on par with the high achieved in Fall '94 with RADAR 50 (see chart, below). Young Adult networks were up 6.3%, but Adult networks took the biggest hit with 2.9%. ABC's Paul Harvey is secure in his position as the #1 ranked personality in network radio. ABC also has 10 of the top 10 programs and 19 of the top 20, with only CBS (WW1) Osgood File breaking in at #14. The next RADAR due in June will reflect several changes in the radio network biz. It will be the first time Chancellor's (O-AM/FMU) AMFM Radio networks will be included in the survey and it will be the first RADAR survey to mark the start of quarterly measurement of network radio.
What you wouldn't give for a powerful radio sales management package. After all, you need to do more than just manage client phone numbers and callbacks. You need hard sales data to help you make hard sales decisions. You need easy-to-use analysis tools for rewarding top sellers and spotting those who need a little help. You need sensible handling for oversold schedules.

Is it too much to ask?

Not any more. It's all here in CBSI Station Management Software. These Windows*-based packages are scalable for any size of operation, from stand-alone stations to large groups. And CBSI systems include more sales management tools than ever, giving you the power to add revenue and productivity to your station.

For sales reporting, you can't beat CBSI's Clickthru Analysis" capabilities. Just click through the multi-layered reports and monitor every aspect of your group or station. Pinpoint trouble spots or star performers with ease.

The Graphical Schedule Planner enables you to make decisions about how to handle bumped spots or oversold situations in advance. And the calendar-style interface puts an end to the reams of printed reports.

With CBSI's new Integrated Sales Manager, taking a sales proposal to the contract and traffic stage is paperless, efficient and just a click away, even for reps dialing in from the field. No more repeat data entry or concerns about accuracy.

Contact us today to find out how CBSI's powerful station management tools can build more sales for you.

More Power...More Sales.
Major broadcasters worldwide choose Dalet more than any other system.

"Dalet has improved the way we do business"

Jim McGuire, Chief Engineer, Emmis New York (Hot 97, Kiss FM, CD 101.9)

"Bugsy," on air at Emmis NY (Hot 97, Kiss FM, CD 101.9).

Cost Efficiency
Whether you are a large or small market station, Dalet offers a completely integrated suite of software which allows the entire staff to work together. All departments - traffic, production, programming, news and on-air - have simultaneous access to all audio, copy and logs. With modular software options, the Dalet system can meet your specific budget requirements - growing with your business needs. Standard hardware also means cost savings. The system is not proprietary, and will grow with the industry. Finally, with Dalet’s easy-to-use interface your staff will be operational in no time.

Reliability
Dalet has the proven expertise to guarantee that your station stays on the air. Choose from a wide range of security options (RAID array, mirrored servers, local backup) to meet your specific requirements. Dalet’s digital audio system has been running on Windows and networks for eight years, at hundreds of sites - from stand-alone to hundred-plus workstation networks. It works for them, it can work for you.
Group Connectivity

Consolidation can generate huge productivity gains, provided groups have the right tools. Dalet is continuously developing new solutions to meet the evolving needs of our clients. With TeamRadio - Dalet's traffic and billing software - the business of over 1000 radio stations can be inked together. Intranet applications allow stations within a group to access each other's orders and audio remotely. The production work done by one station can be used by another, only minutes later.

Unprecedented Support

Dalet is a service-driven company. With more than 70 engineers, we assure that your station stays on the air. Dalet's support experts are on call, 24 hours a day. Clients have on-line support over the Internet. We can also provide on-site visits to upgrade an existing system. "Support on any of these systems, I think, is imperative... Dalet support has been excellent." Jim McGivern
No Free Time Fight—For Now

FCC Chair Bill Kennard (D) has agreed to slow his proposal to force radio and TV stations to give free air time to candidates. "I do think the FCC would have the jurisdiction to do this on its own, but it is not my intention to act unilaterally," Kennard said during testimony before the House Appropriations subcommittee March 25, although he still intends to open a notice of inquiry. "That would get the issues on the table for public debate." Even so, Rep. Harold Rogers (R-KY) pointed out, that debate could be used as evidence if the FCC decides to take the next step.

Sen. John McCain (R-AZ), who has threatened to introduce legislation prohibiting FCC action, released a two word statement saying he was pleased with Kennard's go-slow approach. Just how much free time would be sought still remains unclear, but MBR has learned that most of the proposals circulating want radio and TV stations to give up one percent of their annual commercial air time.

EEO Rules Struck Down

In a stunning decision, a US Appeals Court last month overturned the FCC's EEO rules which have required radio and TV stations to actively recruit minorities since the regulation was adopted in 1968. The panel, comprised of three Reagan appointees, ruled the policy did not serve a compelling public interest.

"We do not think it matters whether a government hiring program imposes hard quotas, soft quotas or goals," wrote Judge Laurence Silberman. "Any one of these techniques induces an employer to hire with an eye toward meeting the numerical target. As such, they can and surely will result in individuals being granted preference because of their race."

FCC Chair Bill Kennard said the nation was "diminished" by the ruling. FCC statistics show minority broadcast employment has risen from 9% in 1971 to nearly 20% last year.

The case grew out of a 1989 NAACP challenge of a license renewal for two Missouri stations owned by the Lutheran Church. The FCC had ruled the Church violated FCC policy for not doing enough to recruit minorities.

Kennard's Minority Challenge

FCC Chair Bill Kennard (D) challenged broadcasters at last month's NAB Las Vegas Convention to present him over the next two months their best ideas toward increasing minority ownership.

"The industry probably won't have a concrete plan to give to Kennard in 60 days," said NAB President Eddie Fritts, adding, "We're willing to explore new options." Kennard said tax certificates may be the way to go, and both he and Fritts agreed an abuse-proof system would be needed.

Kennard was presented with the results of the NAB survey showing radio and TV stations gave nearly $78 worth of air time to public service last year, but rather than applauding broadcaster achievements, he seemed dismissive. "You know that some broadcasters take their public interest obligations seriously. Others don't."

The NAB survey shows the average radio station aired 122 PSAs a week, worth an average of $400K annually, or $3.14B industry-wide. Radio also raised $1.2B for various charities.

In a separate report, the Ad Council says there was a 6% increase in donated radio time. Radio remains the Ad Council's largest supporter, contributing over $573.7M or 58% of the total donated media.

Rush Knocked From #1

The man who many credit with the revival of AM radio has fallen from the top spot, as Rush Limbaugh ranks third in total listeners—according to Talkers magazine's "Talk Radio Research Project." The Talk format has seen a revival since it hit bottom last Spring, with Laura Schlessinger and Howard Stern benefitting most.

Premiere Radio Networks President Steve Lehman points out, on an AQH basis, Rush still reigns supreme. At the request of Premiere, Arbitron is doing a special study looking at Rush's ratings.

Premiere Radio Networks, a subsidiary of Jacor (O:JCOR), syndicates both Limbaugh and Schlessinger. Stern has his own syndication company in a joint venture with CBS (N:CBS).

FCC Wants to Dig Deeper

The FCC has released its plan for collecting FY98 licensing fees. The Commission must collect $162,523 this year, an increase of $10K over FY97. Fees are due in mid-Sep-
tember.

<table>
<thead>
<tr>
<th>Fee Category</th>
<th>FY97 fee</th>
<th>Proposed FY98 fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group 1</td>
<td>$2,000</td>
<td>$2,500</td>
</tr>
<tr>
<td>Group 2</td>
<td>1,800</td>
<td>2,250</td>
</tr>
<tr>
<td>Group 3</td>
<td>1,600</td>
<td>2,000</td>
</tr>
<tr>
<td>Group 4</td>
<td>1,400</td>
<td>1,750</td>
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<tr>
<td>Group 5</td>
<td>1,200</td>
<td>1,500</td>
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<td>Group 6</td>
<td>1,000</td>
<td>1,250</td>
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<tr>
<td>Group 7</td>
<td>800</td>
<td>1,000</td>
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<td>Group 8</td>
<td>600</td>
<td>750</td>
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<tr>
<td>Group 9</td>
<td>400</td>
<td>500</td>
</tr>
<tr>
<td>Group 10</td>
<td>200</td>
<td>250</td>
</tr>
<tr>
<td>AM CPs</td>
<td>195</td>
<td>325</td>
</tr>
<tr>
<td>FM CPs</td>
<td>950</td>
<td>1,150</td>
</tr>
</tbody>
</table>

Source: FCC

Washington Scorecard

by Frank Saxe

FCC Streamlining - While we're all for fewer forms to fill out and electronic filing, the FCC is proposing to lift the requirement that sales agreements be filed with the Commission. This secrecy proposal would mean the marketplace would have no idea about a station's worth and make it impossible to value a station.

Free political airtime - FCC Chair Bill Kennard backs down on his proposal to use the public interest obligation to force radio and TV to give candidates free air time, beyond the massive coverage they are already getting. But the GORE Commission waits in the shadows.

DOJ - DOJ forced CBS to spin off 7 ARS stations to close their merger, while Chancellor caved-in and spun four stations on Long Island to close on its SFX Broadcasting acquisition. We were especially looking forward to seeing DOJ explain their fatally flawed logic before a judge.

Telcom Review - As required by the 1996 Telcom Act, the FCC is reviewing the impact the changes in the law have had on ownership. The Commission is making some noise about bringing back minority tax credits to address what they believe is too few minority owners. Don't expect any wholesale changes, considering the Act's effects are still shaking down.

Microbroadcasting - FCC Chair Bill Kennard continues to encourage Pirates, backhandedly, by saying microbroadcasting may be one way to address the problem of illegal broadcasts.
Radio Captures 15.5% Share of Local Ad Dollars

MBR/Miller, Kaplan Total Media Index

Our second Total Media Index report detailing advertising expenditures for the top 25 local ad categories (representing 90% of local ad dollars) shows radio pulled in 15.5% of the local ad dollars in February. Newspapers are still king with 46.5%. TV isn’t far behind with 43%.

Once again, radio’s share of advertising for the top media categories is puny compared to TV and newspapers. Radio nets 7.7% of the Automotive dollars, compared to 48% for newspapers and 44% for TV. Restaurants is a similar story with newspapers pulling in 47% and TV, 43%.

Radio does best among the smaller spenders, such as Televisions and Publications. (Why is it the other media know what works?)

Another strong category for radio is Medical/Dental/Health Insurance, which spreads the dollars almost evenly across all three media—radio at 29.5%, TV at 34% and newspapers at 36%.

Among advertisers of Music Stores/CD’s/Videos, radio’s 29.8% share is second only to TV’s 50%.

In the growing Communications/Cellular category, radio is holding its own at 22.3% of the dollars, with newspapers netting 36% and TV, 34%.

MBR observation: Last month’s report had radio’s share at 13.3% (MBR April, p. 7). We hesitate to trend, however, because February’s data includes expenditures for an additional three markets (Hartford, Sacramento, and San Diego) for a total of 10 markets.

by Katy Bachman

February 1998
(Expenditures in 000)

<table>
<thead>
<tr>
<th>Category</th>
<th>Newspaper</th>
<th>TV</th>
<th>Radio</th>
<th>Total Media</th>
<th>Radio % of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automotive</td>
<td>$45,401</td>
<td>42,217</td>
<td>7,394</td>
<td>96,012</td>
<td>7.7</td>
</tr>
<tr>
<td>Restaurants</td>
<td>17,383</td>
<td>15,837</td>
<td>3,850</td>
<td>37,070</td>
<td>10.4</td>
</tr>
<tr>
<td>Department Stores</td>
<td>25,846</td>
<td>2,805</td>
<td>3,030</td>
<td>31,681</td>
<td>9.6</td>
</tr>
<tr>
<td>Foods</td>
<td>11,907</td>
<td>11,814</td>
<td>2,919</td>
<td>26,640</td>
<td>11.0</td>
</tr>
<tr>
<td>Communications/Cellular</td>
<td>10,489</td>
<td>10,122</td>
<td>5,933</td>
<td>26,544</td>
<td>22.3</td>
</tr>
<tr>
<td>Furniture</td>
<td>8,140</td>
<td>6,461</td>
<td>1,976</td>
<td>16,577</td>
<td>11.9</td>
</tr>
<tr>
<td>Financial Services</td>
<td>5,408</td>
<td>9,449</td>
<td>3,584</td>
<td>18,441</td>
<td>19.4</td>
</tr>
<tr>
<td>Movies/Theater/Concerts</td>
<td>5,021</td>
<td>5,910</td>
<td>1,822</td>
<td>13,053</td>
<td>14.0</td>
</tr>
<tr>
<td>Grocery Stores</td>
<td>6,977</td>
<td>4,223</td>
<td>3,219</td>
<td>14,419</td>
<td>22.3</td>
</tr>
<tr>
<td>Appliances &amp; Electronics</td>
<td>7,801</td>
<td>3,577</td>
<td>985</td>
<td>12,363</td>
<td>8.0</td>
</tr>
<tr>
<td>Hotels/Resorts/Tours</td>
<td>10,569</td>
<td>2,114</td>
<td>1,490</td>
<td>14,173</td>
<td>10.5</td>
</tr>
<tr>
<td>Drug Stores/Products</td>
<td>3,203</td>
<td>7,348</td>
<td>1,762</td>
<td>12,313</td>
<td>14.3</td>
</tr>
<tr>
<td>Computers/Office Equipment</td>
<td>3,953</td>
<td>1,603</td>
<td>1,254</td>
<td>6,810</td>
<td>18.4</td>
</tr>
<tr>
<td>Other Retail</td>
<td>3,477</td>
<td>2,647</td>
<td>2,708</td>
<td>8,832</td>
<td>30.7</td>
</tr>
<tr>
<td>Medical/Dental/Health Insurance</td>
<td>2,919</td>
<td>2,734</td>
<td>2,368</td>
<td>8,021</td>
<td>29.5</td>
</tr>
<tr>
<td>Auto Parts/Service</td>
<td>1,564</td>
<td>3,108</td>
<td>1,365</td>
<td>6,037</td>
<td>22.6</td>
</tr>
<tr>
<td>Music Stores/CD's Videos</td>
<td>874</td>
<td>2,267</td>
<td>1,331</td>
<td>4,472</td>
<td>29.8</td>
</tr>
<tr>
<td>Transportation</td>
<td>3,705</td>
<td>1,675</td>
<td>852</td>
<td>6,232</td>
<td>13.7</td>
</tr>
<tr>
<td>Entertainment - Other/Lottery</td>
<td>993</td>
<td>1,523</td>
<td>2,193</td>
<td>4,709</td>
<td>46.6</td>
</tr>
<tr>
<td>Home Improvement</td>
<td>3,669</td>
<td>3,167</td>
<td>1,307</td>
<td>8,143</td>
<td>16.0</td>
</tr>
<tr>
<td>Professional Services</td>
<td>539</td>
<td>3,812</td>
<td>1,566</td>
<td>5,917</td>
<td>26.4</td>
</tr>
<tr>
<td>Beverages</td>
<td>202</td>
<td>2,362</td>
<td>1,800</td>
<td>4,364</td>
<td>41.2</td>
</tr>
<tr>
<td>Television</td>
<td>2,801</td>
<td>1,050</td>
<td>6,006</td>
<td>9,857</td>
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$184,965 $150,663 $61,777 $397,405 15.5

*Based on Media Market X-Ray composite data for 10 markets (Atlanta, Dallas, Hartford, Minneapolis-St. Paul, Pittsburgh, Portland, OR, Providence, Sacramento, San Diego, Seattle). Newspaper and television data compiled by Competitive Media Reporting and radio data compiled by Miller, Kaplan, Arase & Co., CPAs. For further information contact George Nadel Riven, CPA at (818) 769-2010.
WANcasting™ is a must for groups
WANcasting allows stations to send copies of system data and audio such as spots, songs, music and traffic logs, and VoiceTRACs between linked sites via Frame Relay networks of any speed.

WANcasting in Use
One example of WANcasting is the Star System™ created by CapStar. They have created a central hub located in Austin, TX. From this central hub they create and distribute the audio needed to run their sites across the country.

Basically, they broadcast across the WAN. The D-Js at Austin bring up a copy of the log for the remote site. They create the VoiceTRACs for the songs in the logs and simply click the mouse to send them down the line. At the remote site the system sees the arrival of the new VoiceTRACs and automatically inserts them into the correct log.

All this is done in the background without the intervention of a single person. By investing in top talent that is all gathered in one location CapStar has simplified their personnel management and insured a quality product.

Other WANcasting sites share talent across several stations. Morning talent at site A will do the morning show for site B, C & D. The afternoon talent at site C will do the afternoon show at site A & B and the evening show for D.

The Bottom Line
There is no limit to how you can use WANcasting to cost-effectively make the most of talent across your entire group. And since the monthly charge for WANs typically runs a few hundred dollars per site the amount of dollars put to the bottom line can be dramatic!

For example - say you have a 5 site group. You decide to use WANcasting by having the afternoon talent at site A do the overnights for site B, C, D & E. Even this very limited use will save the company close to $100,000 per year! The calculations are simple.

Figure an average of $2300.00 per person (salary and benefits) multiplied by four which equals $9200.00 per month or $110,400 per year.

Depending on locations of the sites the WAN charges will run about $12,000 per year. This leaves $98,400 added to the bottom line.

Once the WAN is amortized additional shifts that are added to WANcasting will save the entire cost of the salary!

Use Your Best Talent In More Locations
One can see how super groups such as CapStar can save incredible amounts of money using WANcasting. But the best thing is that the overall quality of the product skyrocketed! All groups have stations that typically have not be able to get top talent. Maybe the site is small, has less than ideal management or ratings. With WANcasting you can put your best talent on stations that could never afford to hire full time talent of the same quality.

Better talent equals better ratings which increases sales.

What a combination! You actually save huge amounts of money while increasing ratings and increasing sales. This is the exact scenario being enjoyed by CapStar right now. Their “WANcaded” stations have risen dramatically in the ratings which has increased sales.

Talk to any top executive of CapStar if you want their opinion of Prophet Systems and WANcasting.

Save Money - Increase Sales
All you have to do is to install Audio Wizard CFS across your group. You will be installing the best, most feature-rich system you can buy and getting all the benefits of WANcasting!

Eliminate the Need for FedEx
Even if your group has no intention of ever doing VoiceTRACs across the WAN you can still benefit greatly from WANcasting. The WAN can send commercials, promos and news cuts from location to location. This can save significant dollars by reducing or eliminating the need for FedEx or DGS to send audio around the group.
Speed
First, all audio sent by WANcasting automatically inserts itself into the system playlist eliminating the need for tedious dubbing of audio from one medium to another.

And, the speed of WANcasting can be a significant plus to news- and sports-based operations. At 256k, WAN can transmit a minute long news cut across the county in under 15 seconds! Fast paced news operations can beat the competition by minutes or even hours. Top talent can easily produce and send spots across the group. Agency ads can be easily sent to other locations saving time and frustration. These are just a few examples of non VoiceTRAC applications of WANcasting.

Successfully Market Tested
CapStar took a calculated risk installing new technology across their group. You don't have to. You can buy Audio Wizard CFS from Prophet Systems, Inc. and know that you are getting technology that has been proven out across some of the largest groups in radio.

You have the peace of mind that comes with buying the proven standard instead of system vendors that simply say that they are “working on it”. Don't be mislead by empty promises or misguided loyalty to aged traffic or music system vendors. Buy the leader, buy the safe bet, buy Audio Wizard CFS from Prophet Systems, Inc. Your investors will be glad you did.

WANcasting™ Wide Area Network Broadcasting
Wide Area Networks (WANs) are nothing new to the corporate world. But until broadcasters had a need to tie together multiple "branch offices," WANs were rare in the industry. Now that radio is big business, groups are making WANs a top priority—not only for sharing back office functions, but music, production, programming, traffic, billing, logs and yes, e-mail.

Most see the need to first establish the system for business, creating Local Area Networks (LANs) at the market level which are then linked to corporate via the WAN. The human and financial efficiencies that lead to bottom-line savings quickly springboard the focus to moving audio. Since these networks all communicate digitally, almost any audio product can be relayed across the country to digital on-air and storage systems.

It's not just production, spots and liners which will be pushed over these networks, but news, music and feature programming. Today, the buzzword is "virtual radio," where a central location can have DJs supply voice tracks for multiple stations in the chain. Those tracks (and logs if necessary) are imported into each station's digital on-air/storage system, which can electronically merge the information for its master log. With a press of a button, the station is automated with a big-market sound.

Pushing audio over networked groups will be slow going. First, terrestrial lines are still limited in sending real-time audio and second, many vendors' systems (digital on-air/storage and traffic/billing) cannot communicate with each other. One solution to that problem, as recently demonstrated by Capstar, is to just buy the company (Prophet Systems) (RBR 4/6, p 4).

With Prophet Systems' Audio Wizard software GulfStar has been transmitting audio over its "Star System" since September 1997, and is leveraging the technology to its limits. DJs create voice tracks while re-reading the logs for a number of stations and transmit them for use at those stations. Using a frame relay network leased from Sprint, GulfStar parent Capstar is aiming at connecting all 324 stations together, with each subgroup chief engineer in charge of their own domain.

The closest example to real-time WAN broadcasting so far is at GulfStar's KKIX-FM (Country) Fayetteville, AR. The morning team sends their show 15 minutes behind real time to KMAG-FM Ft. Smith where it is customized. Also, KJEM-FM Fayetteville (Classic Rock) sends to KLUB-FM Victoria, TX and KZBB-FM Ft. Smith. "Studio lines for receiving stations are call-forwarded to the DJs," said Zeb Huffmaster, CE GulfStar Fayetteville.

"We developed software for that application which downloads the show in chunks that the receiving stations can replay automatically," said Kevin Lockhart, president, Prophet Systems. "We've attempted to put the platform together in such a way that it offers as many possible permutations or program origination/program development/program delivery as can possibly be had," said Frank McCoy, director of engineering, GulfStar and project leader for the GulfStar project. "Capstar will be wired up quicker than you think. We can throw a lot of resources at it and we have the experience curve of GulfStar. We know how to do it, we know what problems we'll encounter and we have experience that you can't get any other way than to do it."

With up to 10 stations in some Capstar markets, there could be 25 or more terminals used at one LAN. Connecting each LAN to the WAN will use from 56k to 1.5 megabit lines. This allows back office functions to be instantly communicated and .60 audio files to be transmitted in under 15 seconds.

Cumulus Media (O:CMLS) was one of the first groups to establish a WAN for back office functions. It uses the Internet to move information from individual radio stations in markets into a centralized accounting system. That system is built with four regional hubs, feeding information back and forth to Cumulus' Chicago and Milwaukee HQs. "Right now we're focused on the business side. We use computers and technology instead of collaboration as the way of organizing our business," said Richard Weening, Executive Director, Cumulus.

The system also carries a proprietary performance reporting, monitoring and control system, allowing management to keep track of each of the radio stations on a daily basis. Revenue performance data can be gathered from one terminal, providing corporate, market, station, department, and individual sales account figures.

Cumulus is using Compaq and Dell computers for system hardware, while the software for performance monitoring is internally developed. Market clusters are running on either the Novell or Windows NT platforms. The central network platform (WAN) runs on a Unix operating system.

Cumulus' networking protocol is frame relay, using IBM's Global Network as the backbone. Frame relay is a technology used by telecommunications companies for Internet-type traffic. Packets of digital information are relayed breaking a longer file into pieces which are reassembled at the receiving end. Cumulus' audio, traffic and billing software systems will support a whole range of virtual radio applications. However, because radio is an intensely local medium, Weening, Lew Dickey Jr. (partner) and his brother, John Dickey (who is in charge of programming) are more skeptical about virtual radio and are approaching it cautiously.

That doesn't mean Cumulus will dismiss the idea. It has had experience with virtual radio in a multi-market network in the eastern Caribbean that shares programming elements and music. It was in use several years before Cumulus was formed.

Cumulus' intent is to leverage its own talent over the network, without ruling out vendors like The Research Group's Virtual Programming or BP's Total Radio for material. It will use virtual radio sparingly at first to ensure local content and live production are not sacrificed.
"How Did We Get Along Without It?"

Jon Rivers - VP - KLTY, Dallas, Texas
Successful radio stations in major markets like KLTY in Dallas depend on their Scott Studios Systems to keep them sounding great! KLTY has four Scott Systems under one roof for four Dallas area stations!

"Scott is very User Friendly"

"Even the novice can come in and use the System well. The graphics are very easy and non-confusing. Plus, the auto fire allows air talent to work on multiple projects in the studio."..."I have been pleased with the ongoing tech support provided. The Scott System is the most reliable system I've ever worked with."

Sherwood Dryden, Chief Engineer
KDBW-FM & KTCZ-FM "Cities 97" - Chancellor Media
Minneapolis-St. Paul, Minnesota

"Our Scott System works so well..."

"...on our two classical stations that we're using it to launch our national Hit Classical Radio format! WCRB Boston and WFCC Cape Cod are the best rated classical stations in the country. We owe our success to getting all the details right. Our Scott Systems help us do that. It's tough to get Classical Radio right. With the help of our Scott System, we do it every day."

David Maxson, VP - WCRB FM, Boston

More stations got Scott Systems in the last 12 months than bought most other systems in the past 4 years!
Most managers, air personalities and program directors prefer the Scott System. That's why more radio stations get Scott Studios than any other digital audio system!

It's a fact: over 1,700 radio stations have 3,800 Scott digital workstations, including major groups like CBS, Chancellor, Disney/ABC, Clear Channel, Emmis, Citadel and many more.

Scott Systems are best because of:
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- uncompressed digital audio;
- 3 products--Good, Better & Best.

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Jacor (O:JCOR) is in the early stages of leveraging its WAN and has already linked with Premiere. It has decided on Novell software to manage its accounting, financial, payroll, marketing, human resources and e-mail network (RBR 3/30, p. 3). Bill Suffa, VP strategic development, said Jacor has been bringing sites up since the first of the year with all the stations tied in by some means to a central accounting server since early last year. The business WAN should be fully utilized by the end of the summer.

As for audio, Jacor is close to choosing which digital on-air storage/automation system will be used throughout its group of stations. But the fact that only one can be chosen has been the subject of careful consideration. Said Suffa: “What it’s comes down to is I can’t choose the best system for a given station. The manufacturers have not set a standard for exchanging data between their different systems. When you send a file, you’re not just sending the audio, you’re sending the header information, intro times of the song, hit points and data on the artist.”

What’s at issue is database manipulation—the way the information is transmitted. A file sent over the RCS system is different than Prophet’s, Enco’s, CBS1s, Dalet’s and BE’s—and vice versa. “Sometimes, you have to modify the files just to get the music itself through,” said Suffa. “And, when one group buys another, it’s a huge capital and timing expense to convert everything over to one system.”

As it stands, each vendor is understandably reluctant to reveal their unique proprietary details to each other for creating that standard.

With the purchase of NSN Network Services (RBR 4/14/97, p.3), Jacor will always have the option of sending programming over satellite or the WAN. Because WANs still don’t allow broadcast-quality real-time audio transmission, Jacor will employ NSN’s higher bandwidth for its own long-form, and Premiere’s programming. “We have for a number of months been sending ‘The Garden Show’ from Cincinnati to Lexington via satellite because it’s a real-time program. With Premiere, we use the traditional broadcast network model. Rush, Dr. Laura, Dr. Dean Edell, Art Bell, etc... will be [co-transmitted over] NSN in the near future,” said Suffa. “The digital technologies for Premiere will allow 30+ channels per carrier.”

It’s all about finding the cheapest and most efficient means to send each product. “If I send a commercial from say Cincinnati to Dayton across the WAN, I’m sending an audio file for play at a later time. If I need to send something real-time, it’s going over satellite. There is a break point where it’s more cost efficient to send audio one way or the other (in terms of the length and time-sensitivity of the program). Our goal is essentially to have it automatic,” said Suffa.

Jacor is also cross-utilizing programming and talent formally. “Under our model, ‘The Mix’ of Cincinnati produces spots, liners and production for ‘The Mix’ stations in Lexington, Lima and Dayton,” says Suffa. Again, the end justifies the means. WONE-AM Dayton and WSAI-AM Cincinnati are linked with RCS’ Master Control NT audio servers across the WAN sharing programming, logs and inserts automatically, while in Idaho, “spoke” stations are receiving programming via NSN satellite. (see chart below) Boise delivers live programming to Twin Falls, Idaho Falls and Pocatello stations where commercials are inserted.

Jacor’s regional news network, launched April 24 at WLAP-AM Lexington, KY, also leverages the WAN with WLW-AM Cincinnati, coupled with national and international stories from ABC. Local story text in Lexington will be sent to Cincinnati (with 12 in-house reporters), anchored out of Cincinnati and customized to WLAP. Those stories are assembled with ABCs and sent to WLAP where local staff will co-anchor the final product. “This started out as an experiment, but will lead to bigger things. We plan on moving it into WONE after any problems that may arise are worked out, then Lima, OH and other smaller regional news-talk market stations, and eventually to bigger markets,” said Sean Compton, ‘not a vice president’, Jacor.

Manager’s Business Report  May 1998
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Ask any software or hardware company how much combined RADIO EXPERIENCE is on their staff. We guarantee nobody comes close to the wide radio backgrounds of RCS people. We've been where you are...station ownership, management, engineering, programming, production, on-air. Experience in ALL facets of radio is curiously absent from other digital computer companies. Plus, RCS uses industry-standard components including Digigram audio cards. Rarely do you make such an important decision...Make this the right one. Get Master Control NT from RCS.

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City: ____________________________State: _______ Zip: ________
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Imagine telling an advertiser: 38% of your listeners make more than a million dollars and your average listener is worth $734,146. That is the upside for Business formatted stations. But despite qualitative research results that most general sales managers only dream of, operating a Business station remains a formidable task.

"More people are watching retirement accounts and 401K plans, Boomers are taking us into the age of business," says GM Michael Richert, WBZS-AM, Washington, DC. He adds, "It is coming out of the niche and into a full-fledged format."

"We saw it as a way to carve out our own niche in the Portland market"

—KBNP's Keith Lyons

One reason Business and other niche formats have grown is radio ownership consolidation. Groups now own several AMs in one market, and it makes little sense for all to compete for the same listener cannibalizing on the strongest station's success. In Denver, Jacor's top AM KOA-AM shares listeners with its Business station, KTLK-AM, but with the 0.2 rating (Fall 1997, 12+) for the Business frequency it is obvious it is not hurting KOA.

"The name of the game in today's radio is not to exchange dollars, but to grow dollars and find new business that hasn't existed before," says Lee Dombrowski, GSM, KTLK-AM Denver. He says Jacor has designed its three AMs so each could survive on its own, without drawing blood from each other. Dombrowski points to the growth of KHOW-AM, which flipped from Talk to Business on March 9, and swapped the station to give its Sports station the stronger of the two signals. The format switch puts Chancellor up against established Business stations WBZS-AM and WMET-AM.

"We find that next to sex, that their favorite thing is they just can't get enough business quotes," says WMET-AM PD Glen Frye, unworried about losing his loyal listener base to WWRC.

While Washington is not a key business center, Richert is also confident of WBZS survival. "There's a lot of money in this town and there are a lot of sophisticated buyers." However, he predicts one of the three will not be able to survive as a Business station. WBZS' owner, Douglas Broadcasting, intends on using its DC frequency as a template for other major market AMs around the country.

One of the first Business stations in the country was KFNN-AM Phoenix, which took to the format in 1989. "The difference was our willingness to last it out. So many broadcasters have tolerance of three to six months, but we stuck it out for the years that it took to make it a success," says Ron Cohen, GM, KFNN-AM. He says they lost money the first three years, but now bill $1M annually, and first quarter revenue this year is up by nearly 25%.

One way Cohen has found to increase billing is for his station to host annual Financial Fests. Four thousand listeners attended a Phoenix show last November, but more importantly it attracted advertisers. KFNN sold the booths to some exhibitors outright, but many more got them as a value-added for buying spot time on the station. How successful was it? Cohen says 20% of white collar employees. He won't divulge numbers, but says billings have been "very, very dramatic—it has been very awesome."

Cohen says the toughest part remains convincing advertisers that small ratings do not mean no listeners. "The hardest thing for us is to get the ad buys. We still have not penetrated national buys because they couldn't care less what our demos are," Cohen says Phoenix ad houses have begun to buy his station, in part because their clients are listening and asking, "What about KFNN?"

"If a business targets business, then it's an easy sell," offers Marc Kaye, GM, WEXZ-AM Seattle. While he admits he would love to get the big accounts such as McDonald's or KMarts, his standalone AM in market #24 is able to bill $600K from business-to-business accounts, including copier dealers, air conditioning companies and temp firms. "The biggest positive is its high-end listeners. You're talking directly to the business community. The negative part is it's not a mass appeal format so you cannot sell in the normal ways expecting some media buyer looking at CPP to give you value for your radio station.

Who is Investing?

A survey came out in April sponsored by two of the nation's largest investment houses, Charles Schwab and Ariel Mutual Funds. The goal was to compare how Whites and African Americans invest their money. What it also shows, is just how many people are investing, especially in the stock market.

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Source: Yankelovich Partners
We only named it.

You've got your own set of problems. Multiple stations, numerous studios and locations. Change, change, and more change. So wouldn't it be nice if there was a complete digital studio system out there, that would let you configure your radio operation your way? There is. We call it AudioVAULT®.

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Solutions for Tomorrow's Radio
Infomericals: A necessary evil
Just about every Business station brokers time for longer, infomercial-style programs. These range from two-and-a-half minutes to an hour, and many take the call-in Talk show approach.

"Brokered time is an absolute necessity. If it weren't for brokered time, I wouldn't be able to keep my doors open," says Cohen. "It is very difficult to get into the mosh pits with the high-rated stations and fight for spot time. I have to look at nontraditional ways to stay in business."

Frye agrees. "I try to keep that to as much a minimum as I can, it's one of the necessary evils, but you have to pay the bills." His station, like many others, does more than cash the client's check; they also conduct background checks looking for lawsuits and charges of unethical dealings.

"Our listeners turn to us to hear many different perspectives and what we have found is that clients can be successful if they expose themselves to our audience," explains Clyde Penn, GSM, WBZS. "Listeners are able to hone in on the ideology of our business and financial experts and decide which strategy they'd like to employ."

Block programming also opens a whole new category of advertiser, particularly consultant-types which must demonstrate to listeners they have some expertise in order to sell their product: themselves.

WWRC PD Steve Chaconas agrees "Infomericals provide information—we always forget that part of the equation." He thinks the paid programming offers a local perspective and gives listeners more than just some arbitrary numbers. "They want to hear what it means and what to do with the information they're getting."

But WEXZ-AM Seattle GM Marc Kaye says some stations take infomericals too far. "It's one of the ways we're very successful in making money. But if you're going to put on any Joe, to earn $250 to $500, then you don't have a format. You have to have a plan and it has to make good radio." WEXZ requires minimum 11-week contracts for long form infomercial users, and it must fit in with the format.

Format of the Future?
Some may dismiss the Business format saying it has popped up simply to cash in on the stock market's boom in the late 1990s. Perhaps, but more predict it will continue to grow as America grays.

"There's a growing audience. As the Baby Boomers are getting older, they're starting to think about retirement and their money," says Frye. One sales manager predicts Boomers will keep the Business format booming for at least the next 10 to 15 years.

Kaye's Seattle station will likely double its signal to 10 kw, but with the stronger signal he doesn't plan on dropping the Business format. "I think with a better signal, I can do what I'm doing even better. I believe the Business news format is a viable format."

Even if the stock market reverses direction, most Business formatters feel it could only help because more people have their money tied to the market than ever before. "We found last Fall, when there were a lot of hiccups in the market, that calls to our stock request line were just overwhelming," says Dombrowski.

For Cohen, the brightest sign is seeing group owners like Jacor switching stations to Business. "It's great to see some of the bigger boys pick up on it because they have the wherewithall to get these ad agencies to take us seriously."

Fighting for Financial Affils
The syndication marketplace is highly competitive in 1998, and those fighting for Business-leaning stations is no exception. The Wall Street Journal's 18-year-old radio network has benefitted from the business boom. It provides live two minute reports to 145 affiliates across the country, mostly News/Talk stations looking to serve their listeners a brief business update. "We offer some marquee value—our name—to the marketplace," says Peggy Belden, director of broadcast services. "Radio stations pick up our branded product because it makes sense on the airwaves and they can sell the reports locally."

WSJ Radio offers its services on a straight barter basis, taking up to two minutes of ad time. The CBS Radio group's All News stations are among those running the WSJ Radio Network and Belden boasts her network has the largest national business audience with coverage in 48 of the top 50 markets.

Michael Bloomberg's radio network is also offered on a barter basis. Bloomberg has three products which it offers to its 120 affiliates. Some stations simply take two minute stock market updates, others take syndicated long-form shows, and about 30 stations take Bloomberg's 24-hour business news simulcast, based at flagship WBBR-AM New York.

"Television for years has been able to segment audiences and radio has always been reluctant to do that. That's changing," says Bloomberg's Mike Morrison.

Business News Network is the veteran, signing-on in 1988. BNN has seen a 169% increase in affiliates since it purchased its competitor, Business Radio Network, in July 1995. Its roster includes 188 affiliates, about half of which consider themselves Business. BNN is offered on barter, requiring stations to give up five minutes an hour.

"A lot of stations are segueing into more business because political talk has been done," says Rick Bockes, VP/Affiliate Relations, BNN. Bockes says several stations picked-up a couple of their shows, and then added more once discovering how profitable Business can be. With consolidation winding down and with the high multiples paid, group owners are no longer allowing AMs to coast at the expense of their FM sister stations. "All their properties will have to make money and one of the ways to do that is by using the network approach," says Bockes.

BNN takes a personality approach, focusing on Business Talk programming weekdays, with consumer and lifestyle Talk on weekends allowing stations to reach additional affinity advertisers, and increase billings.

Because Bloomberg and BNN take different approaches to Business syndication, many stations are affiliates of both. Bockes does not even consider Bloomberg a BNN challenger. "Our biggest competitor is the satellite-delivered music formats."

“Bill Gates is as popular as Michael Jordan, in some circles—and I mean the basketball player not the chairman of CBS. But just the fact we know who the CEO of CBS is, says a lot.”

— Bloomberg's Mike Morrisson
enough said!

The (very independent) Michael Reagan Show

The Dr. Dean Edell Hour

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