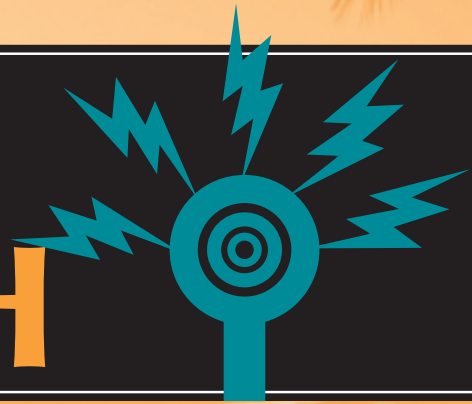


DEMERS DISPATCH



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What's So Active About Active Rock?

All Radio formats undergo constant evolution. Still, the idea that what once was an emerging specialty in the Seventies (Album Rock) would spawn more than a half-dozen successful format permutations today is simply amazing.

The primary offshoot of AOR, Active Rock, began to really emerge as a ratings and revenue force in the early Nineties. Since that time, Active Rock itself has evolved quite a bit.

To get a better idea of the architecture of a typical Active Rock station today, we've analyzed a representative sampling of more than thirty Active Rockers across the country, in various market sizes, that are currently monitored by Mediabase. This sample is more than sufficient to give us some general format parameters.

Across this universe of Active playlists, we see a range of 182-345 titles receiving 2 plays or more per week. The average total playlist of songs receiving this amount of exposure is 273 songs per week.

On average, Active Rockers build their playlist on a foundation of approximately 200 Gold titles, plus another 36 Currents and 33 Recurrents. There is a fair amount of range on the contemporary side, however, with stations playing from 20 to 57 titles in their Current categories and spinning 11 to 43 songs as Recurrents. Given the

level of rotations each of these newer songs receive, the Current or Recurrent "tilt" of an Active Rocker can vary quite a bit.

Rotation levels measured across the sampled Active Rock stations are fairly similar. The most frequently played Currents receive between 30 to 40 spins per week depending on the station, with Recurrents playing 1 to 3 times per day (for 7 to 21 plays per week). As for Gold rotations, most Active Rockers in this sample appear to spin roughly half of their primary library once per day and the other half about every other day.

As one would expect, Active Rock stations with Talk morning shows tend to have shorter playlists, generally in the low 200s total. Currents at these stations also tend to rotate a bit more slowly; barely hitting the 30 spins a week range. Both of these statistics are understandable when you consider that 20+ hours per week of airtime at these stations include no airplay at all.

Between the heavier spot loads of today and the fact that many songs run 5+ minutes in length, the hourly song count for many successful Active Rockers is in the range of 9 or 10. That relatively low number of song impressions per hour means that playlists can be somewhat shorter and yet stations can maintain reasonable rotation levels. For example, a station playing 13 songs an hour would need about 360 titles to maintain the overall rotation scheme that we see at today's Active Rock station. ⚡

While these statistics give you a good idea of the skeleton of an average Active Rocker, the heart and soul of these stations is the music. How has the music mix at the format evolved in recent years? Turn the page and see our in-depth analysis of airplay trends at Active Rock.

ACTIVE ROCK PLAYLIST RANGE 2004

	LOW	HIGH	AVG
Currents	20	57	36
Recurrents	11	43	33
Gold	140	268	204

ACTIVE ROCK EVOLUTION –

ARTIST CONCENTRATION

To learn more about trends at Active Rock we've decided to take a look at airplay patterns over a five-year period - from 1999 through 2003. Our database is the universe of all Active Rock stations in the country monitored by Mediabase throughout that period of time.

One thing that has not changed a great deal over the course of the past five years is the format's reliance on a relative handful of core artists to fuel huge amounts of airplay. The Top 15 most played artists at Active contribute more than a third of the overall spins at the format. While some might immediately point to a horrendous "tightening up" of playlists in recent years, it should be noted that the figure was 35% in 1999 and rose slightly to 36.4% by 2003.

ACTIVE ROCK ARTIST CONCENTRATION

	Top 15	Top 25	Top 50	Top 100
1999	35.0%	48.5%	69.7%	87.0%
2000	36.8%	51.2%	71.0%	87.2%
2001	34.9%	49.9%	70.5%	88.1%
2002	36.4%	51.8%	72.6%	87.4%
2003	36.4%	51.5%	73.2%	89.8%

Concentration of airplay among the top echelon of artists is an ongoing trend. For example, the Top 25 artists now account for more than half of all airplay, moving from 48.5% in '99 to 51.5% in '03. As for the Top 50, they account for nearly three-quarters of all airplay at Active Rock, with the percentage of total spins increasing over the past five years from 69.7% to 73.2%.

FORMAT COMPONENTS

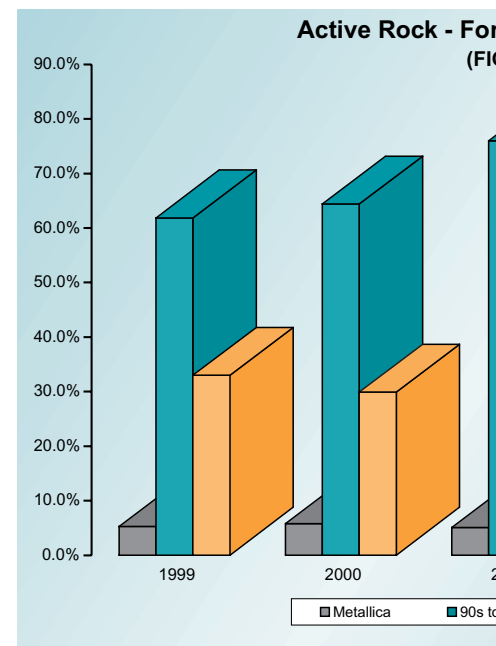
To get the most representative sample for our Format Components analysis, we have expanded the sample to include the Top 100 most played at Active Rock. These artists account for approximately 90% of all airplay at the format. For a big

picture view of how the format is trending in this regard, we are first breaking down Active Rock into three key components – clusters of similar music styles that we have gathered under the following headings – **70s-80s Classic**, **90s to Now** and **Metallica**.

Why should Metallica stand alone? Even though this study will show a significant shift in artist focus overall at Active Rock since 1999, the one unwavering constant is the supremacy of Metallica as the format's most significant artist. They are the single most stable playlist contributor at Active Rock over time. Metallica has accounted for approximately 5% of total airplay at the format over each of the past five years. Apparently, Metallica is *still* mandatory.

Metallica's accomplishment notwithstanding, a review of the Active Rock Format Components chart (FIG 1) shows that the sum of this data supports the notion that Active is a transitional format... as listeners age, they leave the target demo, and take their music tastes with them. Quite simply, the younger guys have less interest in the stuff their older brothers like.

Since 2001, Active Rock has become increasingly split into two camps -- those stations that play nothing pre "Smells Like Teen Spirit," and those that still dip into the Hendrix/Zeppelin/Ozzy pile. While in 1999, it was common to play 70s-80s Classic Rock songs 3 or 4 times an hour, today's average Active Rocker may only play them once or twice an hour, and almost never at night.



1999-2003

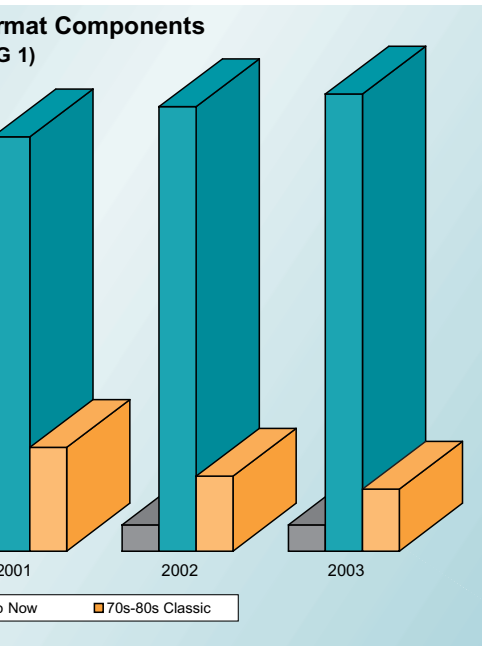
Some Active Rockers, due to heritage or specific market conditions, have more latitude and can still play a good amount of older music from the 80s and even 70s in their broader mix. More and more these days, however, stations are taking a narrow approach, focusing on Today's music with much of their Gold coming from the past 15 years.

One major finding in this analysis of format components is the notable decline in sound styles that would fall under the general heading of *70s-80s Classic*. In 1999, this amalgam of 70s Classic Rock, 80s Hard Classic Rock and Hair Bands accounted for literally a third (33%) of Active Rock airplay. By 2003, *70s-80s Classic* had declined to just 11.4% of total format spins.

Conversely, this five-year span showed a strong increase in more contemporary styles that constitute the format component we call *90s to Now*. The era and styles spanning from Nirvana and Pearl Jam to Godsmack and Linkin Park now constitute 83.8% of all spins at the format.

That figure has increased quite significantly – up from just over 60% in 1999. The tipping point for this shift appears to be 2001 when airplay for the more contemporary side of Active Rock jumped to over 75% of total airplay for the first time.

That year also marked the last appearance by any artist from the 70s-80s Classic format component among the top ten most-played artists at Active Rock. By 2002, even AC/DC had dropped out from this group of the format's elite.



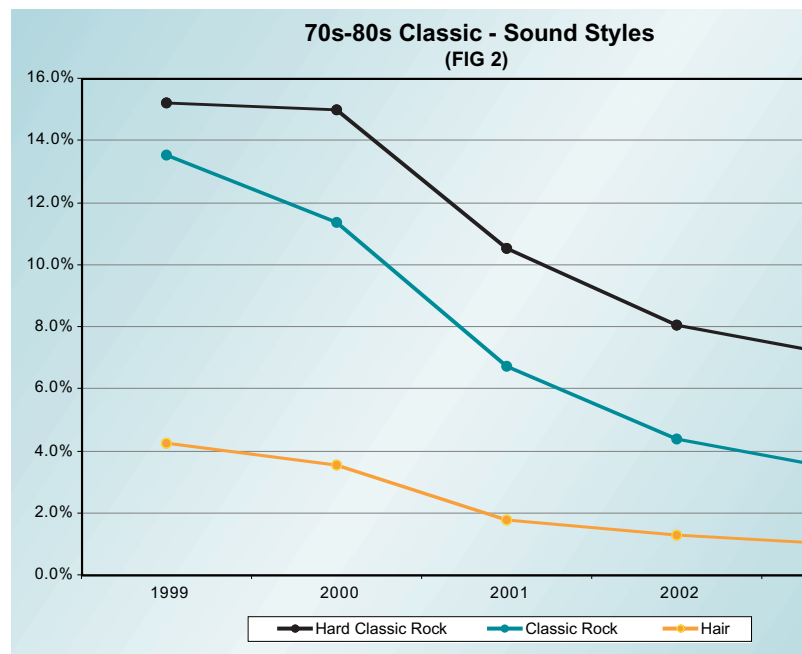
SOUND STYLES

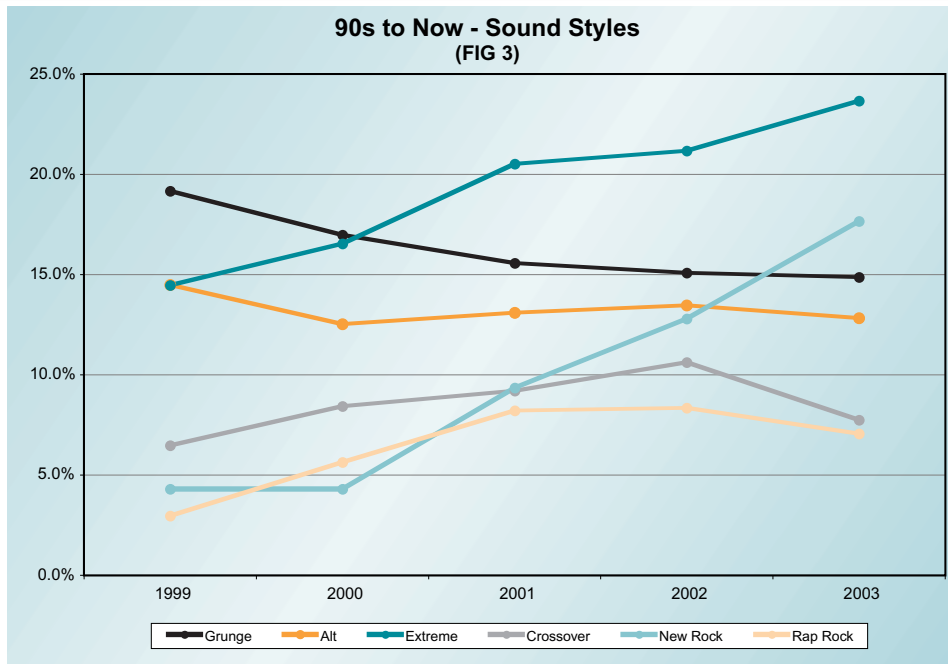
Digging deeper, more discreet sound styles have fared somewhat differently over time as the format has evolved. While the styles that constitute the broad *70s-80s Classic* component have each contributed to the overall decline of this segment, not all aging rockers are fading away equally (FIG 2).

Hard Classic Rock (artists from the Eighties such as AC/DC, Ozzy Osbourne and Guns 'N' Roses) has fared best among this group of older music styles. Still, the share of overall airplay for these artists has been cut by more than half over the past five years, from just over 15% to 7% of total Active Rock spins.

Classic Rock (artists from the 60s and 70s such as Led Zeppelin, Jimi Hendrix and Pink Floyd) was once a force nearly equal to the impact of the Harder Classic rockers. But the decline here is even more dramatic – from 13.5% of all airplay at Active in '99 down to just a "spice" level of 3.3% last year.

Like many of this style's lead singers, the format is losing its Hair (Bands). Never a huge component, the Whitesnake to Winger





Rock bands will likely help sustain the Crossover style segment (artists like Nickelback, Creed and 3 Doors Down).

Rap Rock (bands including Limp Bizkit, Beastie Boys and Linkin Park) showed a strong jump in airplay from 1999 to 2001, but it has been on a slight downtrend since that time. At this point, Rap Rock's viability appears to rest almost solely on

contingent has gone from over 4% to just 1% of airplay at Active.

Looking at the *90s to Now* sound styles, we see a number of key styles emerging that help constitute the growth side of the equation (FIG 3). Preeminent among these is Extreme (artists such as Godsmack, Disturbed and System of a Down), a style that has grown into the single largest airplay style within the format. Extreme airplay now constitutes 23.7% of spins, steadily growing from 14.5% in 1999.

Many of the bands in the Extreme style were just establishing themselves in 1999, and have built up enough catalog to get regular Gold and Recurrent play, as well as providing Active Rock with strong Currents. Godsmack in particular is closest to becoming the format's "new Metallica" in terms of total impact – the band has ranked 10th, 5th, 2nd, 3rd and 2nd in overall airplay over the past five years.

In a vein similar to Extreme, the style we call New Rock (artists whose primary airplay base is Active Rock such as Audioslave, Chevelle and Seether) has emerged as a key format component in its own right. Ultimately, some of these New

the enormously successful track record of Linkin Park.

The older style segments of *90s to Now* are holding on with just slight slippage. Grunge (Nirvana, Alice In Chains, Pearl Jam and the like) has settled into a groove of about 15% total airplay since 2001. The decline from '99 to '01 appears to be due to some lingering Recurrent airplay on a few artists at the very tail end of the last decade. Similarly, Alternative acts (Offspring, Green Day, Red Hot Chili Peppers and more) consistently deliver around 13% of total Active Rock spins.



Our primary intent in taking a detailed look at where the format has been over the past few years is to stimulate some informed speculation among programmers as to where the format is truly headed in the future. As for who will be a part of that future, continue on to "Changing of the Guard" where we take a look at those artists who are fading and those who are taking charge as Active Rock continues to evolve.



CHANGING OF THE GUARD

Behind the scenes of the evolution of Active Rock is the story of the decline or growth of individual artists. In reviewing artist rankings from 1999, we see only 11 artists that are still among the 25 most played for 2003.

As one might expect, the real "losers" at Active Rock airplay tend to be Classic Rockers. Van Halen dropped from #5 most played in 1999 to #36 in 2003. Led Zeppelin declined from #6 to #30 over the same time. Aerosmith also dropped -- from #11 in 1999 to #39 in 5 years and Pink Floyd slid from #17 to #57 most played.

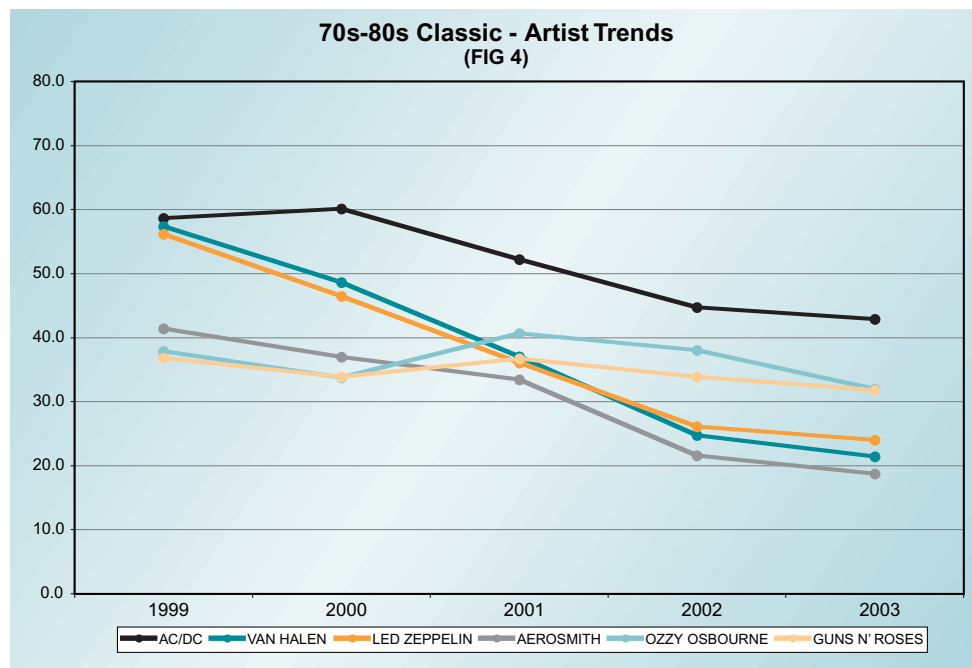
Though the decline of Classic Rockers is not unexpected, some Crossover acts have dropped significantly in Active Rock play as well. Creed was #2 in 1999 and stayed top 10 for the first four years before dropping to #26 in 2003. Collective Soul peaked at #21 in '99 but has dropped since then to #83. In 1999, Lenny Kravitz, was a Top 25 format mainstay, but he barely remained in the top 100 last year.

In all, Grunge artists have shown the most real staying power among those making up the various sound styles, even though the supply of new Grunge is almost nonexistent. Alice in Chains was #3 in 1999 but was still among the Top 10 most played artists at Active Rock in 2003. Stone Temple Pilots began the new millennium ranked 7th most-played and remains at number 7. Perhaps most intriguingly, Nirvana was ranked 13th from 1999 through 2001, jumped to 8th in 2002 and has held firm in that slot since.

An even more effective way to measure the importance of certain artists to the format is to

judge their performance against a consistent benchmark – Metallica. We've developed an indexing scheme to measure the changing fortunes of certain artists over time. Setting the bar with Metallica at 100, we've computed the number of spins for individual artists as a percentage of total Mighty Met exposure.

This measure really gives one more of a sense of how airplay of individual artists contributes to overall stylistic trends. For example, previously we noted that Van Halen dropped significantly in rank among most-played artists from 1999 to 2003. However, in terms of spin impact, the VH



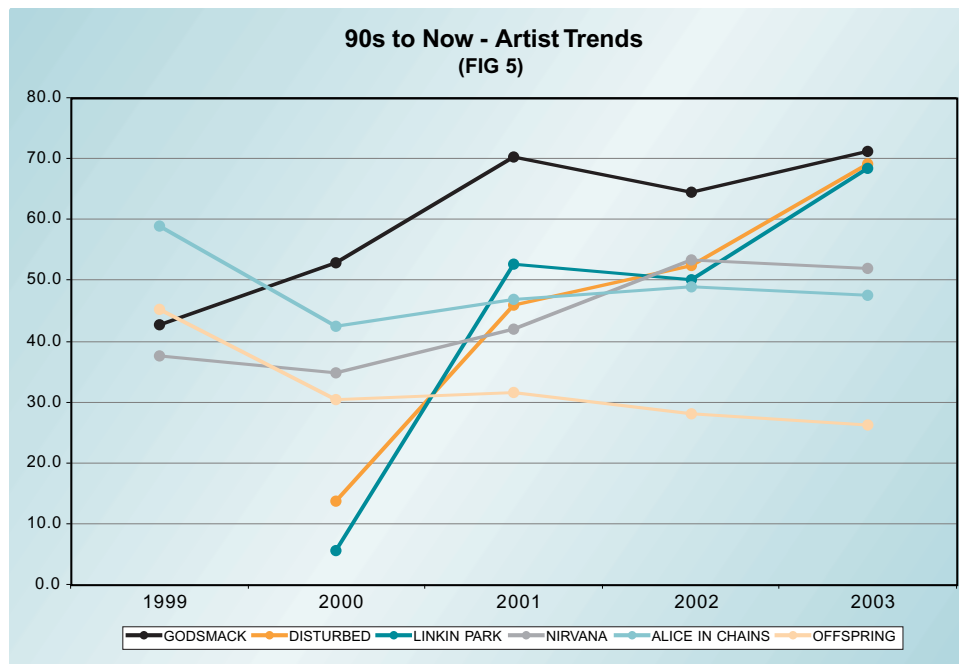
story is even grimmer. (FIG 4) The band's airplay indexed at 57.4 in '99 (more than half the airplay of Metallica) and was down to 21.4 in 2003. As for other Classic Rockers, Led Zeppelin plummets from 56.2 to 24 and Aerosmith drops from more than 40 to less than 20.

Notably, those artists representing the Hard Classic Rock style hold up far better over that period of time. AC/DC, though showing significant decline, remains a significant force at Active with an index of 42.8. Both Ozzy Osbourne and Guns 'N' Roses are relatively

Continued on back

Changing of the Guard

continued



static over the same period of time moving from the mid to low 30s.

The rising fortunes of newer artists and the resiliency of Grunge acts are also evident when one looks at representative artists included in the *90s to Now* format component. (FIG 5) Godsmack has grown tremendously, achieving a spin index of 70 or better in two of the past three years. Likewise, Disturbed and Linkin Park have skyrocketed to become format mainstays since the year 2000.

The Nirvana story remains impressive with the airplay index moving from the 37.6 to 52.1 in 2003. Other Grunge acts retain significance. Notably, Alice In Chains still contributes at a 47.6 spin

rate. On the Alternative side, Offspring was the highest-ranking artist among that sound style in 1999 (#9 overall) with an index of 45.3. In 2003, the band remained the highest ranked Alternative act in the format but their airplay dropped to 26.2 — barely among the Top 30 artists at Active Rock.

While the occasional Classic or Grunge artist produces new music that gets exposure at Active Rock, its clear that the format is a younger man's game. With many of the format's core artists reaching their late 30s and early 40s, the time is right for change. Although newer artists are leading airplay trends, the real challenge is finding the band or musical movement that will create the next musical wave for Active Rock to surf. ⚡

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