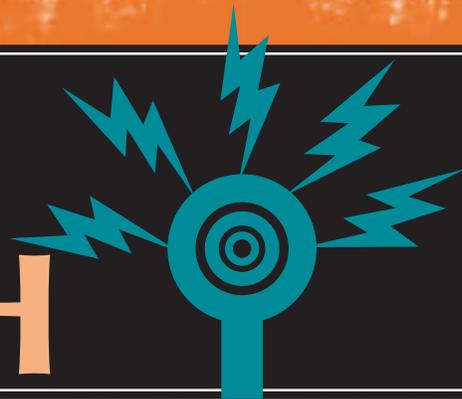


DEMERS DISPATCH



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The Graying of Active Rock

Programming any radio station targeted to younger men is an ever more challenging proposition. In addition to the ongoing Arbitron sampling issues, the last few years have seen an explosion of competitive media and delivery systems.

From satellite radio and the iPod to Internet-based audio services and the emergence of the cell phone as perhaps the ultimate audio delivery device -- more than ever, the consumer is in control.

Today's Active Rock programmers have much less margin for error when making musical choices. The challenge is not only trying to propel cume and increase TSL for their own product, but to compel listeners to spend time with the medium at all.

A number of high profile Active Rock stations have switched out of the format rather than fight demographic trends or increased competition. Others have successfully remained in the format, having made significant adjustments to their targeting and music mix.

These adjustments have been a reaction to the ratings difficulties (and relatively poor financial ROI) that a number of Active Rock stations have experienced over the last several years. Stations focused on chasing the youngest viable Arbitron target (Men 18-24) have found themselves facing a simple choice -- change or die.

While it's too general to state that the traditional Active Rock target demo has shifted completely, a large number of influential (and successful) stations have adjusted their focus. With aging Gen-Xers the primary target, these stations have been putting more emphasis on 30+ listeners, and set their sights on a 25 to 39 base.

We have seen that change reflected in national playlist trends for a good number of Active Rock stations. For these stations, there has been a significant increase in Gold content overall with a reduced emphasis on both Current and Recurrent material.

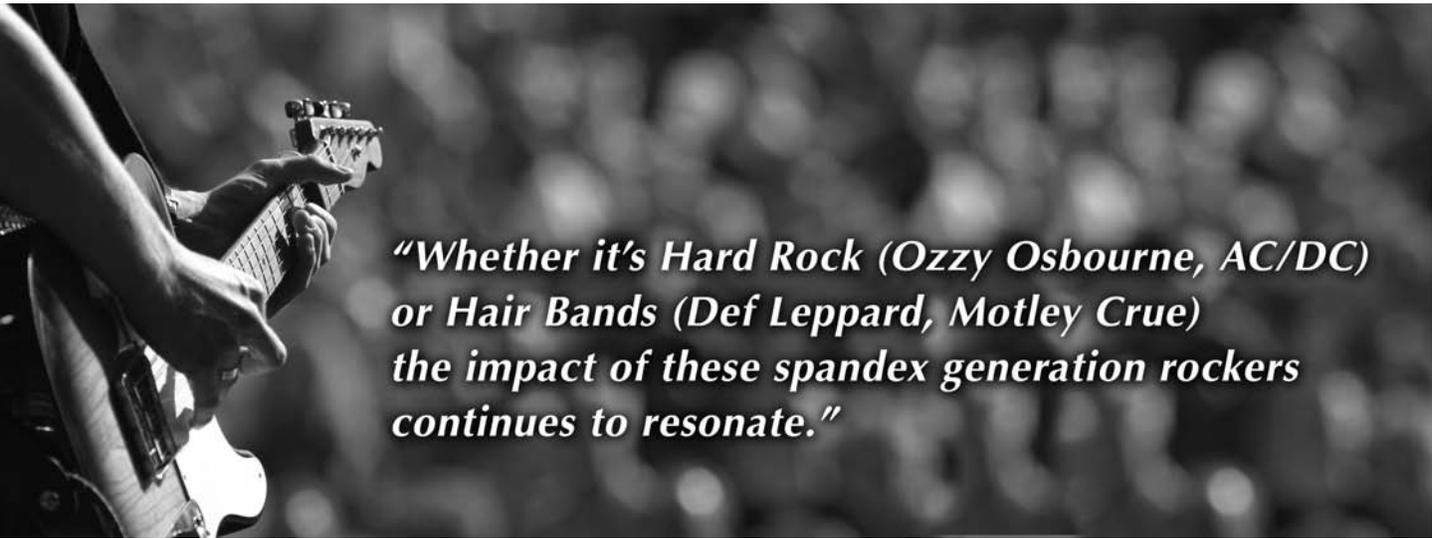
When looking at music released since the year 2000, fewer titles are surviving the playlist cut on a year-to-year basis at more Active Rockers. Music that reflected what were thought to be "emerging movements" in the early part of this decade (Rap Rock -- Limp

Bizkit to Linkin Park; Corporate Rockers like Creed and 3 Doors Down) are now smaller elements of the Active to Mainstream Rock mix. In addition, we are seeing that individual songs are more disposable than in previous incarnations of the format.

The bulk of library material on these more conservative Active Rockers remains rooted in the Nineties. The primary Mainstream Rock band of the decade, Metallica, is joined by an equal dose of music by Grunge acts (Nirvana, Pearl Jam) and 90s Alternative bands that rock (Green Day, Offspring).

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While the 90s still drive the core of these stations’ playlists, a growing number of stations show a significant increase in airplay for harder rocking Classics from the 80s. For many stations, the 80s represent another key component of their format. Whether it’s Hard Rock (Ozzy Osbourne, AC/DC) or Hair Bands (Def Leppard, Motley Crue) the impact of these spandex generation rockers continues to resonate.

In larger markets with increased Classic and Mainstream Rock competition, there has also been a significant increase in airplay at Active for more traditional late 60s and 70s Classic Rock artists. Musicians whose songs now carry a greater than thirty year pedigree pepper these playlists with more regularity.

Artists such as Led Zeppelin and Jimi Hendrix have long been spice for the format. Now, more Mainstream Classic Rockers such as ZZ Top, the Doors and even stadium rockers like Boston and Foreigner, are no longer anomalies on many Active Rock playlists.

There is a very slim musical difference between the Active Rock station and their Mainstream Rock competition in some markets. Many of these Active stations have had to hunker down and rely more on library material than current/hard edged rock in an attempt to maintain solid market cume and TSL.

As Active Rock has become, well, less Active, several stations have moved into an even more dramatic,

nearly 100% Gold-based, position. These stations have changed so dramatically that they are now considered Mainstream Rock stations by the leading monitoring firms.

Though primarily 80s based, these “Everything Rock” stations have a strong Classic Rock component and a much smaller commitment to Current (really Recurrent) music. In fact, their core artist structure most closely resembles what was deemed to be Active Rock in the late 90s to the turn of the century. Structurally, one could consider this brand of rock station almost a throwback to some of the more conservative AOR stations from the mid to late 80s in terms of their contemporary music profile.

What does the future hold for Active Rock? Some have jokingly begun to call the format “Re-Active” Rock, because of many stations’ reliance on more library and Recurrent music in the face of Mainstream Rock and Classic Rock competitors. While many agree that the format’s music might indeed be leaning a bit older, the rock-n-roll party image still begins and ends with the Active Rock station in town.

Being more conservative musically means an increased emphasis on personality and stationality. Killer imaging, extreme marketing, out of the box promotions, and the big cutting edge morning shows are more important than ever. These are the elements that will help keep Active Rock stations sounding fresh, irreverent and relevant... even if the music played is beginning to show a touch of gray. ⚡

What's the Alternative?

From the more Extreme-leaning Alt Rockers to the musically adventurous AAA-flavored stations... from the Active Rock-leaning Alt stations to the local/independents, it seems there is no longer a true consensus as to what constitutes the Alternative format in 2006.

This can readily be seen when reviewing airplay trends for various Alternative stations over the past several years. To many observers, it's obvious that a larger number of stations in the format have become more library-based. Even those that are more musically adventurous are not necessarily playing more *new* music, but rather more *styles* of music.

A number of leading Alternative playlists show a decrease in music from the 90s. There has also been a marked decrease in music from the new millennium. This is easily explained by an increase in Retro 80s material outside of feature programming in some cases. For others, it is simply the fact that artists from this era like Red Hot Chili Peppers and Pearl Jam are also producing new music, thereby reducing spins on their older material.

Meanwhile, there is a pull in the other direction. Some Alternative stations have become more contemporary by increasing spins on a narrow range of Currents and Recurrents. The result of either formatic strategy (more gold or more contemporary) is less exposure for music released in the very early 2000s.

Many of these "too old to be Recurrents but not quite library-ready" songs are no longer important elements of Alternative playlists — regardless of approach. Hence the dichotomy of a format seemingly at odds with itself — older and yet newer at the same time.

Why is this happening? The early years in this decade saw the format become nearly a mirror image of Active Rock, when "Nu Metal" ruled the Alternative earth and bands like KoRn, Godsmack and Limp Bizkit got nearly as many spins on Modern Rock as they did on Active and Xtreme stations.

Recently an upswing in more diverse musical styles (Emo, Garage, Punk, AAA) has balanced the equation somewhat. It appears that many of the format's premiere programmers are trying to get back to their Alternative roots.

Working to compete more effectively with the new music exposure and delivery options (from iPod to cell phone), these programmers are stretching the boundaries of the format in search of "the next big thing." That undercurrent is somewhat visible in the fact that more new artists are populating Alternative playlists now than in recent years.

Make no mistake — there remains a solid core for the format. Artists from the early Grunge era (Nirvana, Stone Temple Pilots, Alice in Chains) are still critical to most successful Alternative stations. Though the number of songs from this genre is limited, Grunge remains a key building block.

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What's the Alternative?

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While the number of individual artists played on Alternative radio has actually increased over the last couple of years, artists with roots in the 90s are still making some of the most important new music for the format today.

Unlike Rhythmic or Pop, where many chart-topping artists' careers are relatively brief, tenured Alternative artists like Green Day and Red Hot Chili Peppers continue to make relevant new music and are still being played. This makes the format potentially more appealing to upper demo listeners, who are often hearing familiar artists, even if the songs are brand new.

Alternative is now exposing a wider range of music than in the recent past. The last time we observed such a range of musical styles was when Alternative exploded on the scene in the early-mid 90s. That growth was the direct result of exciting new musical movements — Grunge and Alternative Pop — that spawned a lifestyle and exposed new rock to the masses.

The difference between then and now?

Then — it was not unusual to hear Alanis Morissette, Limp Bizkit, Dave Matthews Band, Nirvana, Oasis, Metallica, Jewel, the Chemical Brothers and Squirrel

Nut Zippers ALL played on the same Alternative radio station.

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Now — while artists as diverse as Tool, Panic! at the Disco, Jack Johnson, Gorillaz, KoRn, Fall Out Boy, Wolfmother and Coldplay populate the Alternative charts today, most Alternative stations are too niched to embrace them all.

What is the winning formula for Alternative radio today? There isn't a single magic bullet answer. Winning programmers don't necessarily follow national trends, but instead seek *market-specific* solutions that speak to their audience.

The recent emergence of cookie-cutter prescriptions for fixing what ails Alternative stations, such as apologizing to listeners for poor programming choices or putting your station “on shuffle,” may be attention getting short-term tactics. However, they are not long term solutions for radio stations that have forgotten how to connect with their listeners.

In 2006, the real success stories at Alternative are to be found among the stations that have developed entertainment brands that are meaningful far beyond the appeal of being just “about the music.” These stations are, in fact, “about the listeners.” ⚡



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