



What Happens When New Music Gets Played

The Impact of New Songs on the Country Radio Audience

Insights from PPM™, Media MonitorsSM and Coleman

Presented by:

Bill Rose
Senior Vice President of Marketing
Arbitron Inc.
(212) 887-1327
bill.rose@arbitron.com

Philippe Generali
President
Media Monitors, LLC
(800) 67-MEDIA
pgeneral@mediamonitors.com

Jon Coleman
President
Coleman
(919) 571-0000
joncoleman@colemaninsights.com



Overview

In the fall of 2006 Arbitron, Media MonitorsSM and Coleman teamed up to provide insights into what happens to the radio audience when commercials play on radio stations. This groundbreaking study was the first in-depth look at specific issues of audience behavior using Arbitron's Portable People MeterTM (PPMTM) technology.

In this study, the three companies begin to look at music and its impact on the size of the audience. For years it has been taken for granted that playing the right music enhances the size of a radio station's audience and playing the wrong music undermines a station's audience. This truism has been tested repeatedly in the marketplace as new stations playing better music than existent competitors have often fared well in the ratings.

Though no one doubts the need to play the best music, to date there is little real understanding of the impact on audience size by songs. How much audience do some songs add and how much audience do other songs hurt? Theories abound that new music needs to be warmed up, but no one knows for sure how long that takes. The goal of this study is to shed first light on the role of new music on Country radio. It is important to stress that any conclusions or insights obtained from this study about new music on Country radio may not apply to library music. Furthermore, the relative value of new, recurrent or gold is not examined in this study.

The Role of Passive Measurement

Radio programmers are held accountable for the ratings of the radio stations they manage. They get paid based on their ability to deliver the audience their companies demand. The demands for audience delivery accountability are greater today than ever before. In this environment, there is a greater need for reliable audience measurement. Programmers want to know that what they are doing on-air affects the listeners they are trying to reach. Electronic measurement with Arbitron's PPM service is a substantial upgrade in the credibility of ratings for programmers. With PPM radio, programmers will be able to better measure the impact of all aspects of their programming endeavors. With passive measurement, radio can gain even greater insights into the impact of music on the radio audience.



Overview of Methodology

The goal of this study is to determine what happens when new music plays on a Country radio station. When new songs are played, do they add audience to the station, or do new songs actually undermine the audience? Do new songs start in a hole and grow as exposure to the song builds over weeks? Are there patterns in how the audience responds to new songs that can offer insight on how to introduce and expose new music on Country radio?

This study looks at 232,200 minutes of PPM data over a seven-month period on radio station KILT in Houston, Texas. We examined 1,017 unique titles and 265 artists before narrowing the focus of the study to 47 new songs. Each new song played on KILT was tracked in PPM from May until November 2006. The audience size was calculated one minute before each song played and then again calculated one and two minutes into the song. Audience size was also calculated in the last minute of the song. Except where otherwise noted, we compared the audience during the second minute of the song to the audience for the minute prior to the start of the song. The audience data were aggregated for all songs, enabling song performance to be analyzed at different points in time as the songs played and at different points of time in their life cycle (spins and weeks). We also were able to compare results for different types of new Country songs.

Significant Highlights

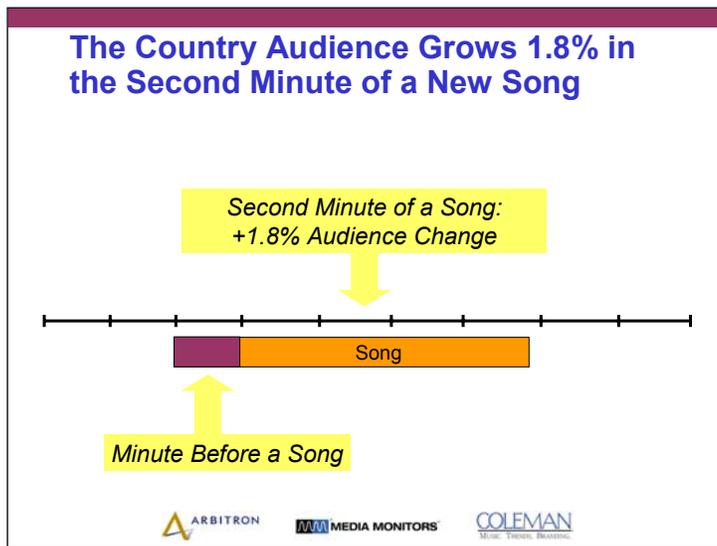
The following is a summary of the highlights of our analyses, which are detailed in the subsequent pages of this report.

- **On average, Country radio audience grows 1.8% with the exposure of a new song.** Thus, playing new music grows the audience compared to the minute prior to its exposure.
- **The audience does not grow in the first minute of the song, but it also does not decline.** In the very first minute of the song there is no audience growth. Growth occurs in the second and subsequent minutes of the song.
- **The audience growth patterns follow natural lifestyle patterns of the audience, with the audience growing more when new songs air in the morning and less in all other dayparts.** This lifestyle-driven pattern is a function of the large tune-in to radio during morning drive. Each daypart has its own unique audience change pattern.
- **Established artists perform better than new artists.** This suggests that listeners are more receptive to new music from artists they already know than they are from newer or less established artists.
- **Up-tempo music performs better than slower music.** Whereas up-tempo music has an immediate and positive impact on audience change, slower music appears to show a negative impact in the first weeks of exposure and then gains some ground as listeners hear a song more.
- **Male artists perform better than female artists.** This finding supports the general finding of earlier research in Country radio that male artists are more readily embraced by the audience than female artists.
- **New male artists perform only slightly better than new female artists.** The data indicate that neither a new male nor a new female artist has significant positive audience impact, but that the new male artists do slightly outperform new female artists.
- **The cycle of all songs from introduction to maximal audience change is about 25 weeks, or approximately 450 spins.** Almost all songs perform better after a period of “warming up.” While some songs start off with positive audience change and others start off with negative change, it takes about 25 weeks for a song to hit its maximal performance. This 25-week cycle appears to be valid for most song types.

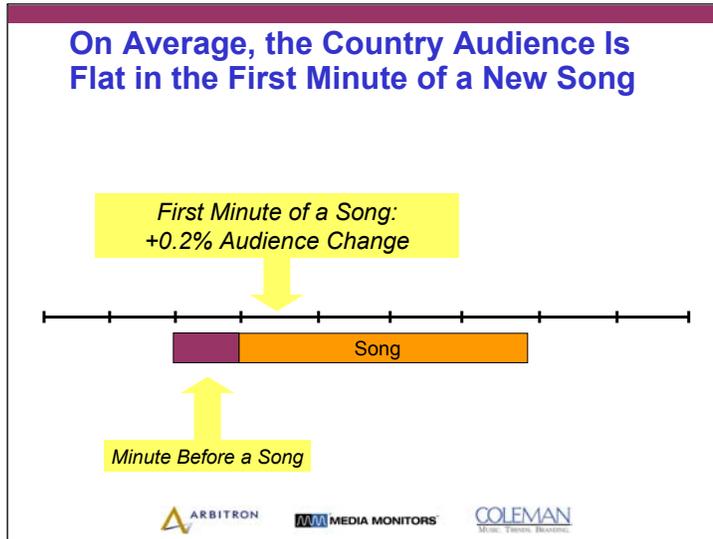
- **After hitting its zenith at 25 weeks or 450 spins, a new song’s positive audience impact begins to slow.** Thus, songs hit their zenith or height of positive maturation at about 25 weeks, or 450 plays. Immediately after this level, the rate of positive audience change declines. There were not enough songs in the time frame of this study to receive 600+ spins to allow us audience change rates past about 600 plays. Therefore, we do not know how audience change rates play out when songs go beyond the 30-week/600-spin level.
- **The range of impact most songs have on audience levels is +8% or -5% from the audience one minute before the song airs.** Analysis of all the songs examined indicates that for most songs the swing is from a low of -5% audience change to a high of +8% points audience change.
- **Although the audience change patterns outlined are clear, there are individual exceptions to the “rules.”** Some of the songs in this analysis showed individual response contrary to the overall patterns. This is important, because, despite patterns, it does suggest each song needs to be evaluated on its own merits.

Key Findings

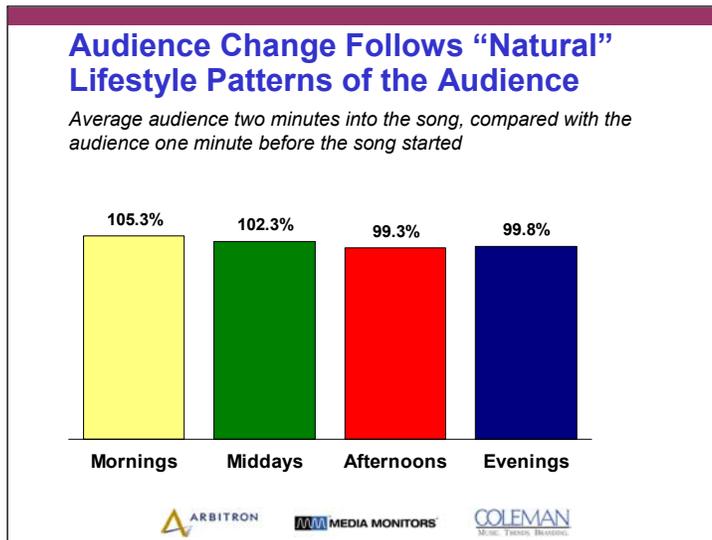
- 1. On average, Country radio audience grows 1.8% two minutes into the exposure of a new song.** The study calculated the impact of 47 new songs on the size of the audience one minute before a song played and compared it to one minute and two minutes into a song and to the last minute of a song. We aggregated every exposure of all the new songs played over eight months. Some songs played all eight months, while others started at various times in the eight-month period of the study. The average audience change for all 47 songs studied two minutes into the new song is +1.8%. This means that the audience for new songs is, on average, higher two minutes into the song than one minute before it airs. We assume that the growth is greater when a new song follows a commercial set and less when it follows another song, but in this study we did not calculate this difference, though it will be examined in future studies of new music on Country radio.



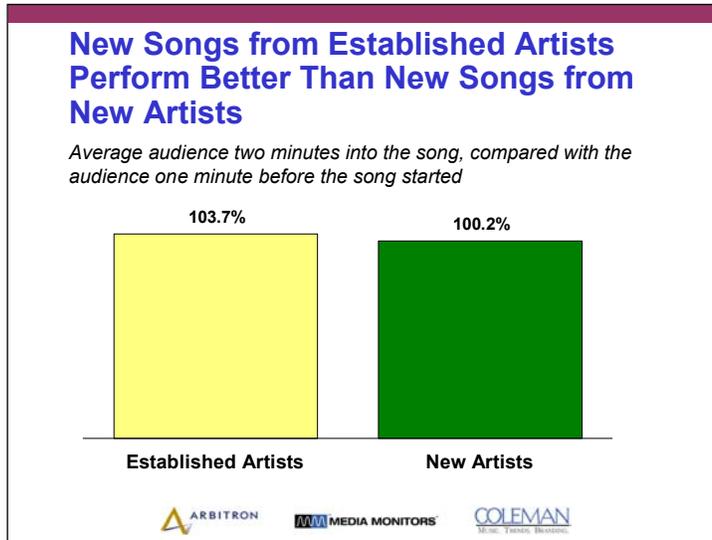
- 2. The audience does not grow in the first minute of the song, but it also does not decline.** This suggests that tune-out and tune-in are likely very small in the first minute of a new song. The growth in audience occurs in the second and subsequent minutes of a song, indicating that much of the new audience is added as new listeners tune in to radio and that the tune-in outweighs any loss over the course of the song's exposure.



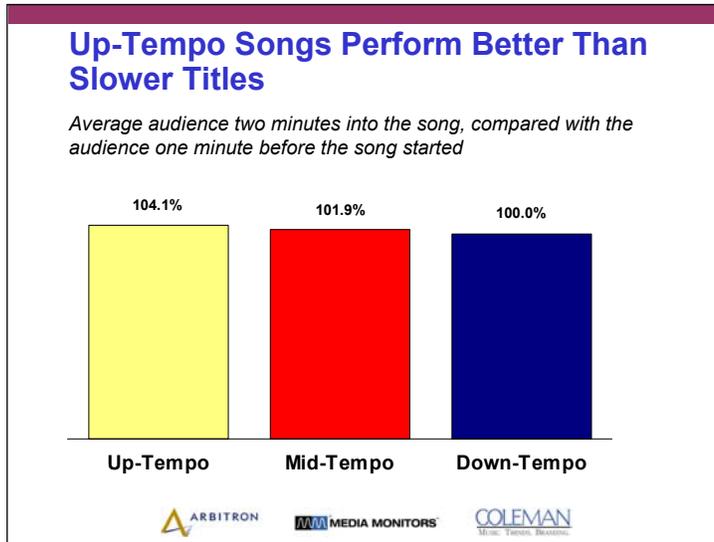
3. **The audience growth rates follow the natural lifestyle patterns of the audience, with the audience growing more when new songs air in morning drive and less when they air in all other dayparts.** In the commercial retention study conducted by Arbitron, Media Monitors and Coleman in the fall of 2006, we discovered that audience retention during commercial breaks is much higher in morning drive than in other dayparts. The reason this occurs is the natural listening patterns as the day progresses. Thus, in morning drive the audience is tuning in to the medium in large numbers and is tuning in at a much faster rate than they are tuning out or changing to other radio stations. As a result, a song's audience change will be much greater in morning drive than in afternoon drive. In morning drive, the audience for the average new song grows in size by 5.3%, whereas in afternoon drive the average song loses audience at a rate of 0.7%. This is not necessarily because listeners are more fickle in afternoon drive. It is driven more by the audience turning off their radios and leaving the medium later in the day. Midday has a positive growth rate of 2.3%, and evening is negative at a 0.2%.



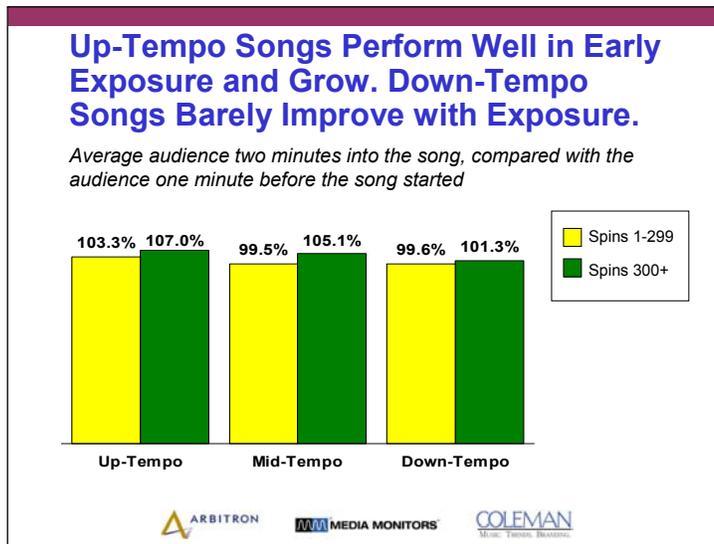
4. **Established artists perform better than new artists.** One of the hypotheses developed before conducting this study was that established artists perform better than new artists in building the audience for Country radio. This hypothesis appears to be confirmed as the audience for established artists grows an average of 3.7%, whereas for newer artists the audience is basically flat at -0.2%. (See the appendix for a listing of established and new artist listing. All designations were determined by Coleman.)



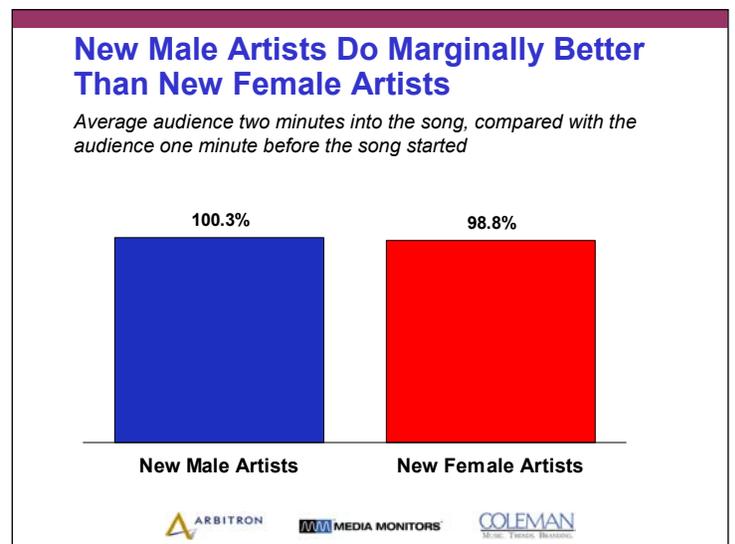
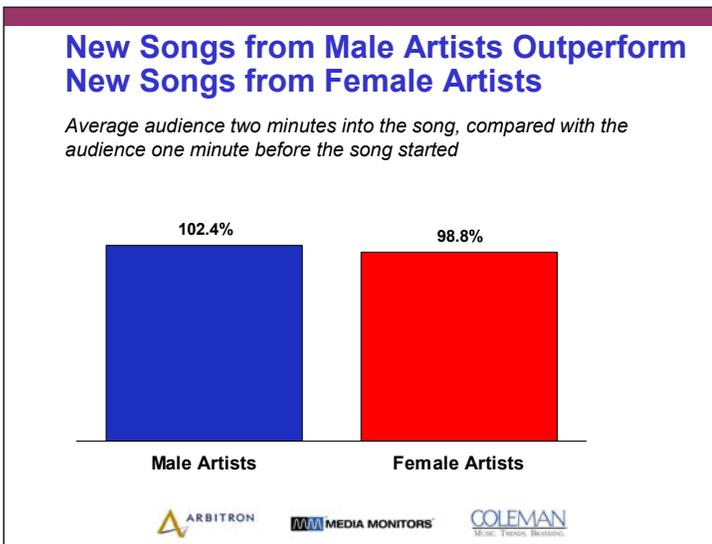
5. **Up-tempo music performs better than slower music.** In our analysis we coded every song slow, medium or up-tempo. There were 11 songs in the slow category, 27 in the mid-tempo category and nine in the up-tempo category. The songs in the up-tempo category had a positive audience change of 4.1%, while the slow songs showed no increase or decline (0.0%). Thus, up-tempo songs do much better than slower songs. Furthermore, mid-tempo songs perform right in between the slow and up-tempo songs, increasing the audience 1.9%.



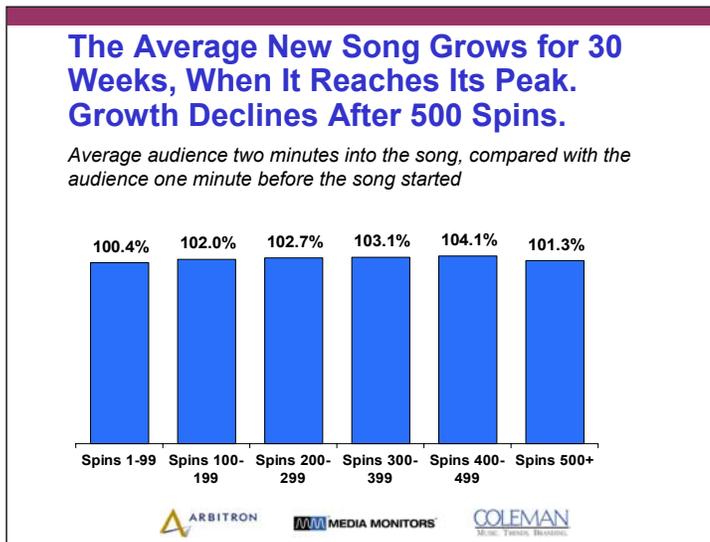
The relationship between tempo and audience levels also shows an interesting pattern with regards to performance at various points in the life cycle of the song. Slow new songs do not do well at any time in their lifecycle, though they do improve as the song gets more exposure. In the first 299 spins down-tempo songs are basically neutral (-0.4%), while they gain audience at a slow rate after 300 plays (1.3%). In contrast, mid-tempo songs perform about the same as slow songs for the first 299 spins, but then grow their audience in spins 300+. In contrast, up-tempo songs show a consistently positive pattern. The audience growth for up-tempo songs is similar when they have fewer than 300 plays (3.3%) to when they have 300+ spins (7.0%). This suggests that listeners embrace up-tempo songs immediately and continue to embrace them for a very long time.



- 6. Male artists perform better than female artists, though this is less noticeable when comparing new male artists to new female artists.** The study found a relationship between the gender of the performer and the magnitude of audience change. Overall, all male artists grow the audience 2.4%, whereas with all female artists the audience goes down 1.2%. New female artists show a decline of 1.2%, whereas new male artists show a slight increase (0.3%). The relationship appears to be positive, but because the study examined very few established female artists, more research in this area needs to be done in the future. One interesting thing is that this finding parallels what many Country program directors have known for some time—that Country music brand affiliation is very strong between female consumers and male artists. The format generally skews female, and this may suggest that women are driving the positive reaction to male artists.



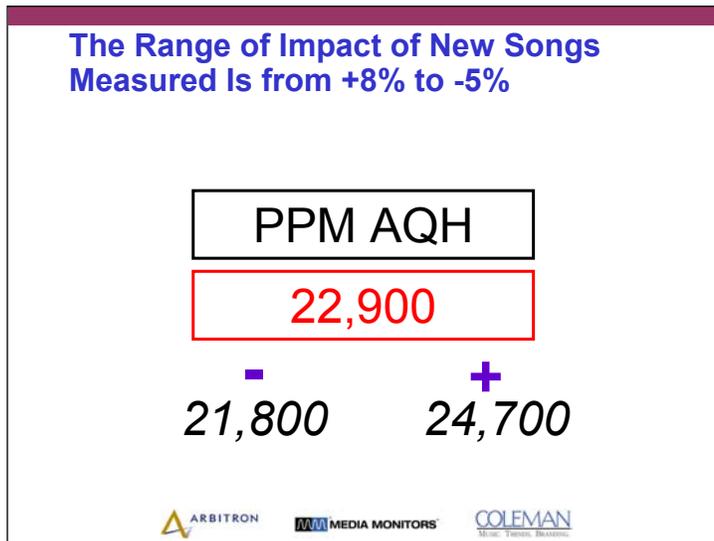
7. **The time required for a song to reach its optimal performance is about 25 weeks, or approximately 450 spins.** One of the most intriguing questions facing programmers for years has been, How long does it take to establish a new song and what happens in its early weeks? This research suggests that, on average, songs show little audience growth in the first 100 plays (or about six to seven weeks) of exposure, and then grow slowly and consistently between 100 and 499 plays. This is about 25 weeks for most songs. The audience change in the first 99 plays is +0.4%; in plays 100-199, the rate of song growth is 2.0%; and then in plays 200-299, the growth rate is 2.7%, followed by 3.1% (300-399 spins) and 4.1% (up to 499 spins).



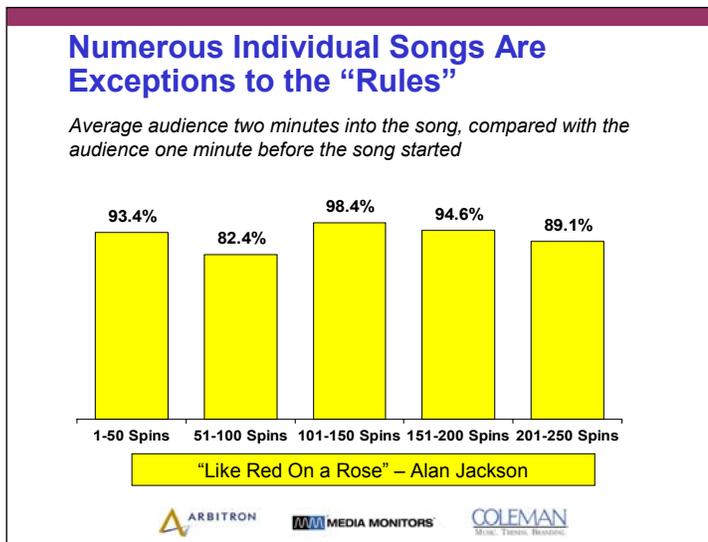
8. **After 500 spins, new songs continue to have positive audience growth, but the rate of growth slows.** The audience continues to grow for songs after 500 plays, but at a much lower rate (1.3%). Because this study concluded in November 2006, we were not able to track enough songs at 500+ plays to determine whether once a song's positive rate declined it continued to stay at or near the 1.3% audience change rate or whether this is just a statistical variation we see as the number of songs studied and the number of spins declined.

9. **The range of impact most songs have on audience levels is +8% to -5%.** Analysis of all the songs examined indicates that most songs have a fairly well-defined range of positive or negative audience change. This range is +8% to -5% from the minute before the songs airing. Two-thirds of all songs fall in this range. There are some songs that perform outside these ranges, but, for the most part, these songs had fewer plays or exposures and, therefore, were more susceptible to greater statistical wobble.

When this range is calculated against station KILT's current ratings we can calculate the impact on KILT of playing the weakest songs or the strongest songs. In the January 2007 PPM demonstration data, there were 22,900 people listening to KILT during an Average Quarter Hour among persons 12+, Monday-Sunday 6AM-Midnight. We estimate the impact of the weaker music on KILT could mean a 5% lower AQH audience (minus 1,100 AQH persons,) and the impact of stronger songs would be an 8% higher audience (plus 1,800 AQH persons). This suggests that as important as the music is for KILT, in a vacuum (not considering other programming or marketing initiatives) the music has an important but not deciding (at least in one survey month) impact on the station's performance. In fact, it suggests that the KILT brand is probably the more important variable when it comes to large swings in the station's ratings.



10. Even though the audience change patterns outlined are clear, there are individual exceptions to the “rules.” Thus, it is possible to find established artists who do poorly, or female artists who do as well as male artists, and so on. In this research we looked at the performance of 47 songs in aggregate. When we say that up-tempo songs do better than slow songs this is not a “universal” statement. It is a pattern we see in the aggregated data. For example, Alan Jackson released the song “Like Red On a Rose.” This song undermined the audience in the first 10 plays and never in any week did it show positive audience change. This song did poorly despite the superstar status of Alan Jackson. Did it do poorly because it was a bad song? Or did it do poorly because it was a slow song? Or did it do poorly because it violated Jackson’s brand? The point is that if stations just rely on selective findings from this research and stop playing less established artists, ballads or female artists, they will be missing the point of the research. Country radio must consider a variety of qualities of the songs they consider playing, and they must consider the songs in the context of the values of the brand. Seeing patterns in aggregate in this early study of KILT is not an endorsement for stations to forgo individual song evaluation and judgments.



Thoughts on This Study and Going Forward with PPM

- **One market, one station, one time.** Programmers need to be very careful about drawing too many firm conclusions about all radio or all Country radio from this study. This study was done in one market at one time. It was limited to 47 new songs that we were able to measure in an eight-month period. Houston may not represent Country nationally, and KILT is one of three Country stations in Houston. As a result, how listeners use KILT may be very different from how they use Country radio in other market situations and other regions of the country. What motivates the KILT audience may be very different from what works for other stations in other locations.
- **This study was conducted for the Country format.** Even though some of the findings in this study may prove to be applicable to other formats, it is important to recognize that the listeners of other formats may not react to new music in the same manner as those in this study. For example, the behaviors of listeners in this specific study may prove to be inconsistent with the behaviors of Mainstream AC, Classic Rock listeners, and so on. In other words, new music may have varying levels of importance to listeners of other formats. Thus, the findings of this study should not be interpreted to mean that the observed behaviors for new Country music will apply to all formats in all markets.
- **Rotation of new music varies from format to format.** It is also important for programmers of non-Country stations to interpret the findings of this study within the context of the rotations most associated with Country stations. Although Top 40 stations may rotate their best-testing currents up to 100 times a week, most Country stations rotate power currents 40 to 50 times per week and brand new songs with as few as 10 to 15 spins per week. Therefore, the number of spins to reach song maturation will vary depending on format and market conditions.

- **Program to the brand, not just the PPM.** One of the big lessons Coleman has learned after 30 years in the business of brand building for radio is that stations that program for the short-term ratings impact can often create long-term perceptual backlash. For example, short-term tactics can violate the brand expectations of the audience because they overly narrow or focus the station. Tactics such as this can cause an immediate surge, but set the station up for ratings problems down the road. When call-out research and auditorium music testing were first done, they resulted in tighter play lists, but they also resulted in less music diversity. In the same way, the potential exists for this research to be accidentally abused. If radio stations play only songs that boost audience in the 3% or above range, they run the risk of becoming one-dimensional and stale pretty quickly. This can create long-term opportunities for other Country radio stations.

After its inception, call-out research slowed the addition of new music to radio, but PPM data applied literally could stall new music completely. Imagine a station that plays only established, male and up-tempo songs. Pretty soon this format would create a need for one that plays slower, female- or new artist-based radio. If the radio brand is one where diversity is expected, then stations will have to program to fulfill that need.

The data also suggest that the range of audience change is, on average, moderate, not large. If KILT violates the PPM data occasionally for the sake of fulfilling its larger position in the market, the data suggest that it will have no measurable impact on the ratings. This research suggests that people use the KILT brand, not just the individual KILT songs. Although songs do have a positive and negative impact on ratings, they are not in the course of months the only determinant of loyalty and listening.

- **More tools needed than just PPM to measure what to play and how often to play it.** The research indicates that it takes a long time for individual songs to fully reveal themselves. There are songs that test poorly in the first few weeks, but that turn out to be among the best in a year. Josh Turner's "Would You Go with Me" is a perfect case in point. It was a turn-off to the KILT audience for about 10 weeks before it turned around and showed positive audience growth. It became the 13th most played song in the country by the end of 2006. If programmers around the U.S. had results similar to this study for Josh Turner's song, the song may never have made it past week five or six. Stations need to know what their listeners want in the macro, not just which songs they are responding to behaviorally right now. Programmers need to know which songs listeners like that will have a positive impact on their brand. These data, along with PPM data, will be needed to know how to program stations in the future. If Josh Turner's song was highly popular with the target at the same time it was getting a negative PPM response, it might have been a song worth sticking with all the way to 13th most played song nationally.

- **Need for more research on PPM and song performance in Country radio.** This research has offered significant insights, but it should be just the beginning. The conclusions we have reached are profound, but if there is not further research on these topics, programmers will not be well-served. It is possible that in Houston the reaction to new music is entirely different for KKIQ or KTHH than it is for KILT. In Chicago, WUSN's audience may be radically different than KILT's. The variables of market size, region and market makeup need to be analyzed further before these findings are chiseled in stone as truths for Country radio.

This study also looked only at the impact of new music on the Country audience. We did not examine audience change for library music. Further research is needed to determine what happens when library music comes on. Do new songs show more or less positive audience growth than library? How long before a new song enters the "library" status in terms of audience growth? How do much older songs perform compared to new ones? How do songs perform on contemporary Country vs. Classic Country stations? These are but a few of the specific issues that need to be addressed going forward.

How the Study Was Conducted

Our goal was to determine what happens to the audience when new music is played on the radio. Specifically, how much does the audience change at one minute and two minutes during the song itself, and at the end of each song, as compared with the minute before the start of the new music? This study looks at 232,200 minutes of PPM data and the audience for 47 unique and new songs played during the seven-month period of May through November 2006 on KILT-FM in Houston, Texas.

PPM

For the past 15 years, Arbitron has worked to make passive electronic measurement a reality in the United States and overseas with its PPM (Portable People Meter) service. PPM is an audience measurement technology that can detect inaudible codes embedded within audio programming. Randomly selected people carry the PPM device with them, and it detects the encoded audio that person is exposed to each day. PPM is passive because respondents don't need to remember their listening behavior and write it down. All panelists need to do is take their PPM with them, and it does the rest automatically.

PPM detects exposure to encoded audio programming, notes the time and length of the exposure and stores the information. Each day, the panelists recharge the units and the data are automatically sent to Arbitron for processing. PPM measurement starts in the United States in 2007 with Philadelphia and Houston becoming the first markets to use portable, passive and electronic measurement. Arbitron is poised to roll out the service in the balance of Top 50 U.S. markets by 2010. It is also commercially deployed in several countries around the world.

PPM's passive electronic measurement dramatically reduces response bias (forgetting to record listening, recording listening that didn't occur or recording more listening than occurred) associated with recall-based measurement. Although people are able to provide adequate records of listening to radio over a period of a week with recall-based measurement such as the Arbitron diary, their ability to recall listening during a specific song on a given day is limited. With PPM, people don't need to note their behavior and remember to tell us about it. PPM does that automatically. Panelists simply need to remember to bring the device with them during the day, and Arbitron's patented motion detector and compliance systems help ensure that they do.



Media Monitors

Media Monitors, LLC, the world leader in radio spot monitoring and print ad tracking, provides services for broadcasters, newspapers, media research firms and advertising agencies.

For decades, it was expensive and tedious for radio advertisers to verify the number of times a spot played or whether the right copy ran on-air. In addition, manual monitoring methods were incomplete, because they did not cover the full range of major properties in a market and often only monitored selected periods during the year. Now, using the patented technology of Media Monitors, clients can have details on a particular radio spot or an entire radio and print campaign at their fingertips in seconds. Additionally, this technology can also be used to identify other non-spot-related content. Media Monitors records all of the audio from top-rated radio stations using field sites in major markets, including Houston, upon which this study is based. Media Monitors' patented method of audio fingerprinting technology is then used to identify spots, music and other programming elements. These are forwarded to Media Monitors' Data Centers, where teams of spot and music specialists research and identify new advertisers and songs. Play information is then added to the existing online database, where thousands of daily users can easily access, sort and examine it using a simple Web interface.

Media Monitors' data are also a crucial component in analyzing the impact of commercials on radio audiences. Media Monitors enabled us to identify and analyze the music played on a song-by-song basis and their start and stop times for the May through November study period, using a consistent and highly regarded systematic approach.



Appendix

The following tables provide average estimates of the net change in audience for the music examined at various levels of aggregated airplay. These estimates are expressed as a percentage of audience change one minute prior to each respective song to two minutes after each song begins.

Percent of Audience Change All Songs: One Minute Prior – One Minute In – Two Minutes In – End of Song by Various Levels of Play or ‘Spins’

Audience at given minute during a song, expressed as a percentage of the audience one minute prior to start of the song			
No. of Spins	1 Minute	2 Minutes	Last Minute
1-99	99.9%	100.4%	101.1%
100-199	100.2%	102.0%	102.7%
200-299	100.6%	102.7%	103.0%
300-399	100.9%	103.1%	102.2%
400-499	100.2%	104.1%	103.7%
500+	99.0%	101.3%	102.4%
Total	100.2%	101.8%	102.2%

How to read: For new music played 1-99 times, the audience changed, on average - 0.1% after playing for one minute, +0.4% after playing two minutes and +1.1% by the end of the song.

Percent of Audience Change: Daypart

Audience two minutes into a song, expressed as a percentage of the audience one minute prior to start of the song				
Daypart	5AM-10AM	10AM-3PM	3PM-7PM	7PM-MID
Percent of Change	105.3%	102.3%	99.3%	99.8%

How to read: For new music the audience changed on average +5.3% in the morning, +2.3% during midday, -0.7% afternoon drive and -0.2% at night.

Percent of Audience Change: New vs. Established Artists, by Weeks of Play

Audience two minutes into a song, expressed as a percentage of the audience one minute prior to start of the song

Weeks	Established Artists	New Artists
1-14	103.0%	98.0%
15-31	106.3%	96.6%
Total	103.7%	99.8%

How to read: For new song by an established artist played in weeks 1-14, the audience changed, on average, 3.0%; and for a song by a new artist played in weeks 1-14, the audience changed, on average, -2.0%.

**Percent of Audience Change: Male vs. Female Artists/
 Percent of Audience Change: New Male vs. New Female Artists**

Audience two minutes into a song, expressed as a percentage of the audience one minute prior to start of the song

Gender of Artist	All Artists	New Artists
Female	98.8%	98.8%
Male	102.4%	100.3%
Total	101.8%	101.8%

How to read: For new music by female artists, the audience changed, on average -1.2%. For new music by new female artists, the audience changed, on average, -1.2%. For new music by male artists, the audience changed 2.4%. For new music by new male artists, the audience changed, on average 0.03%.

Percent of Audience Change: Down-Tempo vs. Mid-Tempo vs. Up-Tempo by Various Levels of Play or ‘Spins’

Audience two minutes into a song, expressed as a percentage of the audience one minute prior to start of the song

No. of Spins	Down-Tempo	Mid-Tempo	Up-Tempo
1-299	99.6%	100.5%	103.3%
300+	101.3%	105.1%	107.0%
Total	100.0%	101.9%	104.1%

How to read: For new music played 1-299 times, the audience changed, on average, -0.4% for down-tempo songs, 0.5% for mid-tempo songs and 3.3% for up-tempo songs.



Song / Artist / Tempo Designations

The following table contains the specific titles examined and their designated coding. Established artist and new artist status was derived by analyzing artist airplay in the year prior (2005), by career charting status and by subjectively reviewing artist relevance. Tempo assignments were derived using Coleman database designations

Title	Established Artists	Tempo
A Little Bit of Life	Craig Morgan	Up-tempo
A Little Like That	Gary Allan	Mid-tempo
A Little Too Late	Toby Keith	Mid-tempo
Crash Here Tonight	Toby Keith	Down-tempo
Finding My Way Back Home	Lee Ann Womack	Mid-tempo
Give It Away	George Strait	Mid-tempo
God Only Cries	Diamond Rio	Down-tempo
If Loving Her Doesn't Kill Me	John Anderson	Up-tempo
It Just Comes Natural	George Strait	Mid-tempo
Ladies Love Country Boys	Country Boys, Trace Adkins	Up-tempo
Life Is a Highway	Rascal Flatts	Up-tempo
Like Red On a Rose	Alan Jackson	Down-tempo
Mama, Before She Was Mama	Clay Walker	Mid-tempo
Me and God	Josh Turner	Mid-tempo
Me and My Gang	Rascal Flatts	Up-tempo
Mountains	Lonestar	Mid-tempo
My Little Girl	Tim McGraw	Down-tempo
My Wish	Rascal Flatts	Down-tempo
Once in a Lifetime	Keith Urban	Mid-tempo
Some People Change	Montgomery Gentry	Mid-tempo
Texas Cookin'	George Strait	Mid-tempo
The Reason Why	Vince Gill	Down-tempo
The Woman in My Life	Phil Vassar	Down-tempo
Wait for Me	Bob Seger	Mid-tempo
When the Stars Go Blue	Tim McGraw	Down-tempo
Wrapped	George Strait	Mid-tempo

Title	New Artists	Tempo
Alyssa Lies	Jason Michael Carroll	Down-tempo
Broken	Lindsey Haun	Down-tempo
Every Mile a Memory	Dierks Bentley	Mid-tempo
Feels Just Like It Should	Pat Green	Up-tempo
Findin' a Good Man	Danielle Peck	Mid-tempo
I Don't Know What She Said (But I Sure...)	Blaine Larsen	Mid-tempo
I Loved Her First	Heartland	Down-tempo
Kiss Me in the Dark	Randy Rogers Band	Mid-tempo
Leave the Pieces	Wreckers	Mid-tempo
Men and Mascara	Julie Roberts	Mid-tempo
My, Oh My	Wreckers	Mid-tempo
Red High Heels	Kellie Pickler	Mid-tempo
That's So You	Rushlow Harris	Up-tempo
Tim McGraw	Taylor Swift	Mid-tempo
Unbroken Ground	Gary Nichols	Mid-tempo
Want To	Sugarland	Mid-tempo
Watching You	Rodney Adkins	Mid-tempo
Way Back Texas	Pat Green	Mid-tempo
What I Wouldn't Give for Your Love	Kevin Fowler	Up-tempo
Would You Go with Me	Josh Turner	Mid-tempo
Yee Haw	Jake Owen	Up-tempo

About Arbitron

Arbitron Inc. (NYSE: ARB) is an international media and marketing research firm serving radio broadcasters, cable companies, advertisers, advertising agencies and outdoor advertising companies in the United States, Mexico and Europe. Arbitron's core businesses are measuring network and local market radio audiences across the United States; surveying the retail, media and product patterns of local market consumers; and providing application software used for analyzing media audience and marketing information data. The company is developing the Portable People Meter™ (PPM™), a new technology for radio, broadcast television and cable ratings.

Arbitron's marketing and business units are supported by a world-renowned research and technology organization located in Columbia, Maryland. Arbitron has approximately 1,700 employees; its executive offices are located in New York City. Through its Scarborough Research joint venture with The Nielsen Company, Arbitron also provides media and marketing research services to the broadcast television, magazine, newspaper, outdoor and online industries.

Arbitron's Out-of-Home division provides training, consumer shopping data and audience profiles for out-of-home and outdoor media. Currently, more than 100 outdoor plants, place-based media and thousands of agencies and advertisers utilize Arbitron Out-of-Home consumer shopping data and software. The company is currently working with the industry to develop an outdoor audience ratings service.

Credible third-party measurement helps advertisers justify their investment in the medium. The company's 50+ years of audience measurement experience help sellers focus on selling the value of their advertising rather than justifying the credibility of their measurement. Arbitron research studies about cinema advertising, the outdoor industry and traditional and nontraditional media can be found on the company's Web site at www.arbitron.com and can be downloaded free of charge.

Additional information about Arbitron: www.arbitron.com.



About Media Monitors

Media Monitors' web-based services provide same-day spot and ad information from Radio, Television, Local Cable and Newspaper to their subscribers: broadcasters, newspapers, media research firms and advertising agencies.

Audio Services and Analysis

Employing the patented technology of Media Monitors, clients have details on radio, TV, local cable spot or print campaigns at their fingertips in seconds. Media Monitors records the on-air broadcast of radio stations as well as TV and cable channels using field sites in the Top 100 markets. With audio fingerprinting technology, spots are identified along with song titles and artist names where music is played. These are forwarded to Media Monitors' Data Centers, where teams of spot and music specialists research and validate new advertisers and songs.

Print Services and Analysis

In the photography labs of Media Monitors, major newspapers from around the country are monitored daily by the discovery team, photographed and then uploaded to the site. Advertisers, agencies and newspaper companies can see the page placement, size of the print ad along with the newspaper and market by going to the Media Monitors site.

Media Monitors helps the buyers and sellers of advertising in America and gives them an easy-to-use means of analyzing the impact of their work on their target markets.

In the Houston Market

In the Houston market, Media Monitors enabled us to identify and analyze the music played on a song-by-song basis with start and stop times during the May through November 2006 study period. Using this systematic approach, we were able to garner a more accurate report and create the unique analysis you see. Having a minute-to-minute reality to work with and Media Monitors to verify the information, we were able to increase the value of this study.

Additional information about Media Monitors: www.mediamonitors.com.



About Coleman

Coleman, headquartered in Research Triangle Park, NC, with offices in Los Angeles and Hamburg, Germany, is a media research firm that has provided its clients with deeper insights into music trends and branding opportunities since 1978. Its client base includes MTV Networks as well as hundreds of radio stations in North America, South America, Europe and Asia, including those owned by CBS Radio, Emmis Communications, Lincoln Financial Media, Spanish Broadcasting System, ABC Radio, Entercom Communications Corporation, Grupo Radio Centro, Bonneville International Corporation, Standard Radio, Sandusky Radio, Lagardère International, Radio One, Beasley Broadcast Group, Inner City Broadcasting, Grupo Prisa, Mid-West Family Broadcast Group, The Mondadori Group, Connoisseur Media, Corporación Radial del Perú, South Central Communications, SBS Broadcasting, Maverick Media, Entertainment Network (India) Limited and Hubbard Broadcasting.

Additional information about Coleman: www.ColemanInsights.com.





New York

142 West 57th Street
New York, NY 10019-3300
(212) 887-1300

Chicago

222 South Riverside Plaza
Suite 630
Chicago, IL 60606-6101
(312) 542-1900

Atlanta

9000 Central Parkway
Suite 300
Atlanta, GA 30328-1639
(770) 668-5400

Los Angeles

10877 Wilshire Boulevard
Suite 1400
Los Angeles, CA 90024-4341
(310) 824-6600

Dallas

13355 Noel Road
Suite 1120
Dallas, TX 75240-6646
(972) 385-5388

Washington/Baltimore

9705 Patuxent Woods Drive
Columbia, MD 21046-1572
(410) 312-8000

Birmingham

3500 Colonnade Parkway
Suite 400
Birmingham, AL 35243

www.arbitron.com