

COLEMAN

MUSIC. TRENDS. BRANDING.

Coleman Music Monitor

Analysis:

An Early Peek at

Rhythmic AC

Written by
Greg Dunkin, Vice President

COLEMAN Music. Trends. Branding.
P.O. Box 13929
Research Triangle Park, North Carolina 27709
(919) 571-0000
www.ColemanInsights.com

For more information, contact ColemanInformation@ColemanInsights.com

© Copyright 2006, COLEMAN Music. Trends. Branding.

RHYTHMIC AC "MOViN" ACROSS THE COUNTRY

The radio industry has witnessed the launch of a number of Rhythmic AC stations over the last six months, with many of these stations employing the "MOViN" brand licensed from Alan Burns & Associates. The first convert, Sandusky's heritage AC station in Seattle, changed format on May 1st, 2006. Recently, Emmis's long-time Country franchise in Los Angeles, KZLA, also made the move to Rhythmic AC, becoming KMVN on August 17th. Weeks later, CBS-owned KFRC/San Francisco and KOAI/Dallas vacated their formats for MOViN.

Over the same period, Clear Channel has launched its own versions of the format and Sinclair dubbed its own approach to it "Energy" when it launched a new station in Norfolk. Many industry insiders also point to Citadel's "Diva"-branded WDVW/New Orleans as a forerunner to this trend.

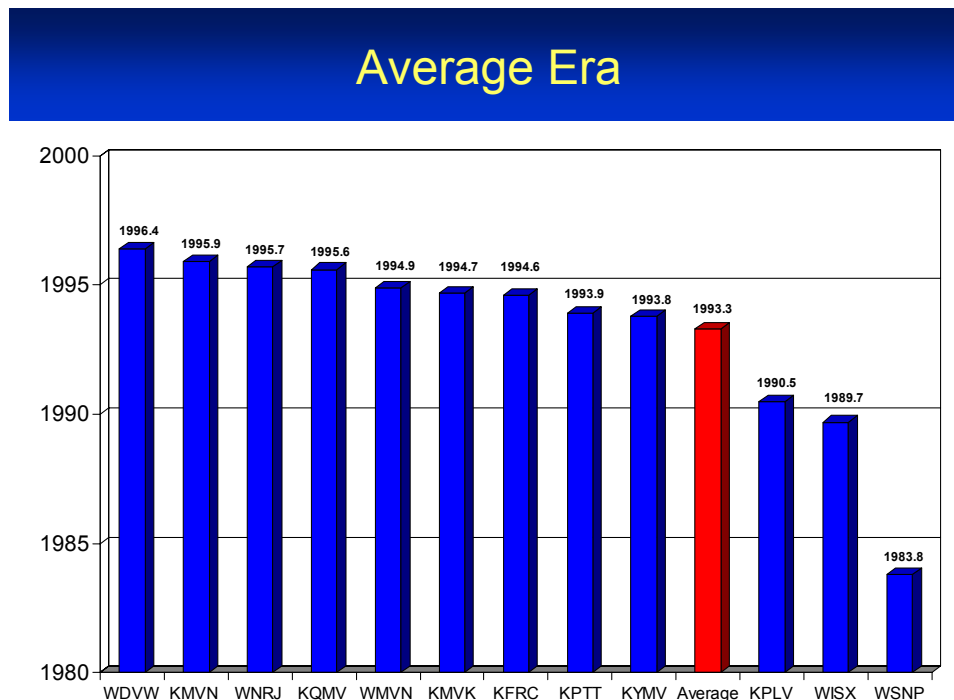
To provide deeper insights into this format, Coleman has completed a detailed analysis of the music product of many of these Rhythmic AC outlets¹. We also compared the differences between the MOViN and Clear Channel versions of the format.

Our findings point to a fairly high degree of consistency between the music approaches taken by all of these stations. Most are mid-tempo, centered in the early- to mid-90s and expose more Contemporary Rhythmic Pop than any other sound. We do, however, see some exceptions to these findings, including some fairly significant differences between the MOViN stations and Clear Channel's Rhythmic ACs.

¹ The Appendix to this report contains complete details from our monitor analysis.

MOST STATIONS' MUSIC CENTERED IN THE EARLY TO MID-90S

The Average Era of the stations monitored in this report is 1993.3. However, there is a fairly broad range of approaches taken by the stations we monitored in terms of Era. WDVW/New Orleans is the most contemporary with a 1996.4 Average Era, while WSNP/Rochester and its 1983.8 Average Era is the oldest by far.

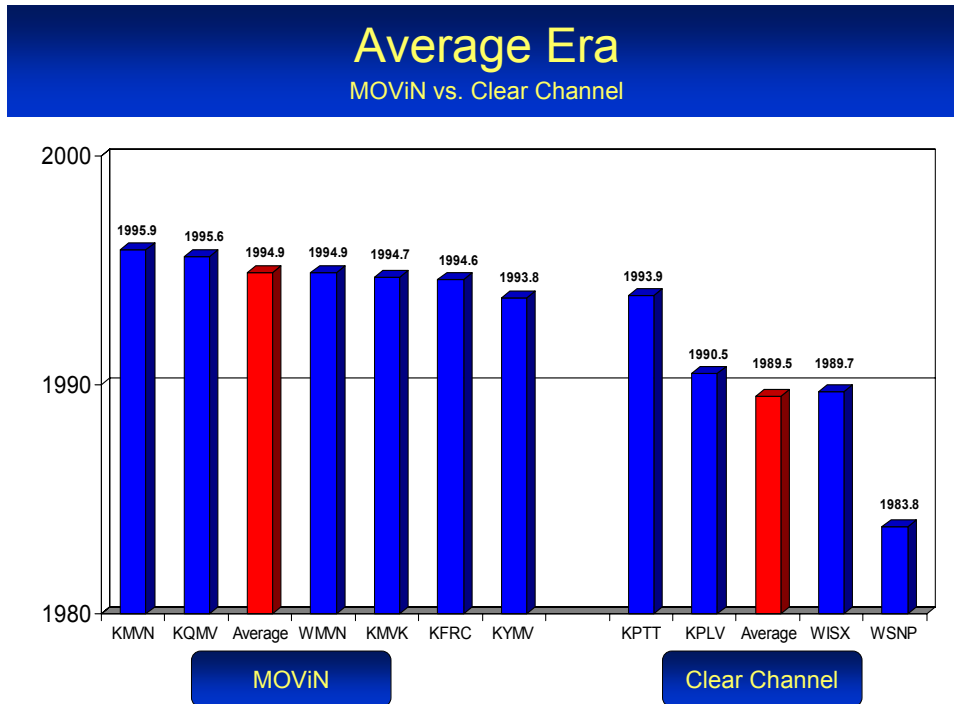


A noteworthy aspect of the Average Era data is the difference between the MOViN stations and the Clear Channel stations, with the MOViN stations taking a far more contemporary approach. There is more than a five-year difference between the Average Eras of these two groups of stations, with the MOViN stations averaging 1994.9 and the Clear Channel stations having an Average Era of 1989.5.

Furthermore, we do not see much variation in the Average Eras of the MOViN stations. The most contemporary MOViN station—KMVN/Los Angeles—has a

1995.9 Average Era while the oldest MOViN station—KYMV/Salt Lake City is roughly two years older at 1993.8.

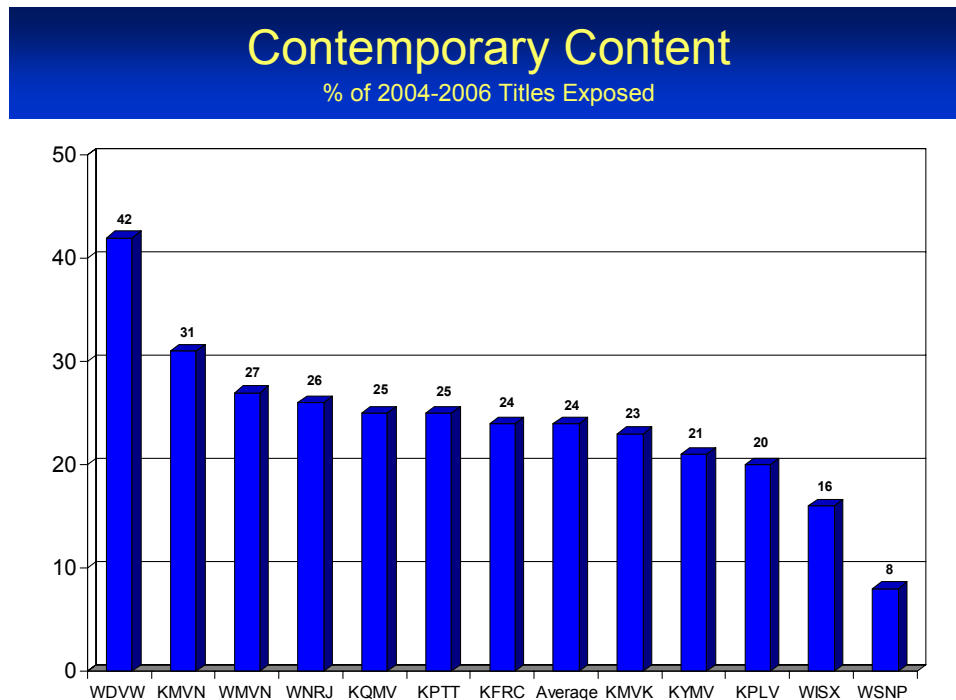
There is, however, a wider disparity between the Clear Channel Rhythmic AC stations. For example, KPTT/Denver is the most contemporary, with an Average Era of 1993.9, while WSNP/Rochester takes the oldest approach of the Clear Channel stations with an Average Era of 1983.8. Also noteworthy is that the most contemporary of Clear Channel's stations (KPTT/Denver) is only a month more contemporary than the oldest-skewing MOViN station we monitored (KYMV/Salt Lake City).



CURRENT / RECURRENT MUSIC PART OF RECIPE

Although Rhythmic AC is predominately a Gold-based format, a fair amount of contemporary material is featured on the stations in our analysis. On average, 24% of the music played the stations we monitored was released since 2004.

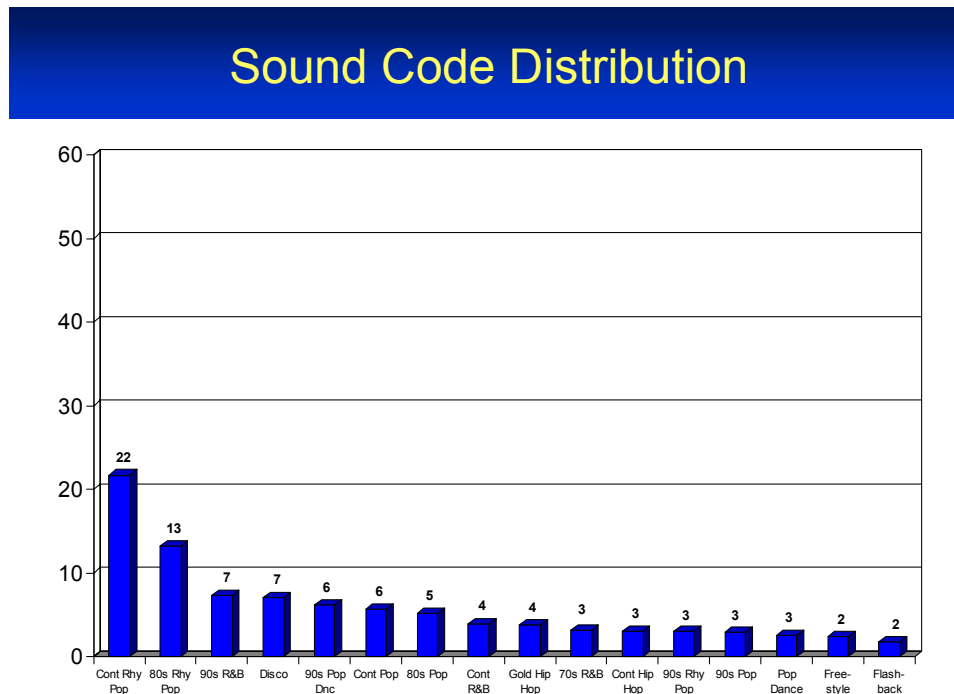
Given that it has the most contemporary Average Era, it is not surprising that—at 42%—WDVW/New Orleans exposes more post-2003 material than any of the other stations we analyzed. WSNP/Rochester is playing the least amount of Current/Recurrent material, with only 8% of the music exposed on the station coming from 2004 to today.



Of the MOViN stations examined, KMVN/Los Angeles plays the most post-2003 material, at 31%. KYMV/Salt Lake City plays the least amount of Current/Recurrent material of the MOViN stations, with 21% of its music released since 2004.

CONTEMPORARY RHYTHMIC POP MOST PLAYED ON MOViN; DISCO FAR MORE PREVALENT IN CLEAR CHANNEL MODEL

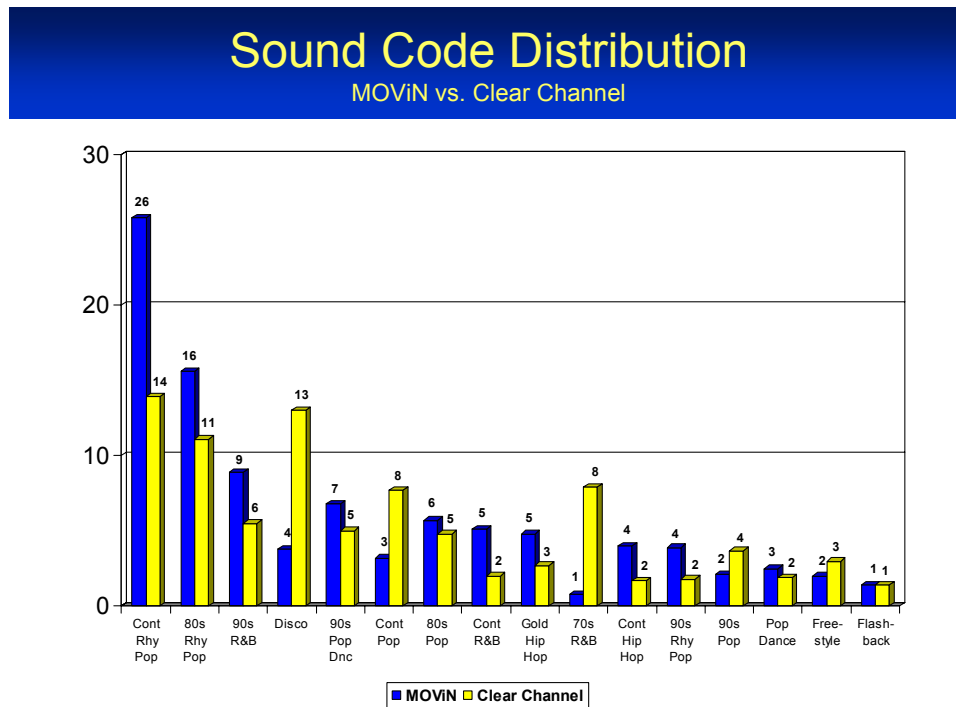
When we examine the texture of the music on the Rhythmic AC stations in our analysis, we find that Contemporary Rhythmic Pop is the most heavily exposed genre. The Contemporary Rhythmic Pop sound—exemplified by titles like “Ain’t No Other Main” by Christina Aguilera, Nelly Furtado’s “Promiscuous” and “Buttons” by Pussycat Dolls—makes up an average of 22% of the music played. Other styles of music featured prominently include 80s Rhythmic Pop, 90s R&B, Disco, 90s Pop Dance, Contemporary Pop and 80s Pop.



We observe, however, very significant differences between the amounts of Contemporary Rhythmic Pop played on MOViN stations versus on Clear Channel Rhythmic AC stations. More than a quarter—26%—of the music played by MOViN stations is Contemporary Rhythmic Pop, while the Clear Channel stations feature only a 14% exposure level for this sound. This still makes Contemporary Rhythmic Pop the most exposed sound on the Clear Channel stations, but it

does not dominate the other sounds to the extent that it does on the MOViN stations.

Instead, the Clear Channel stations play almost as much Disco and 80s Rhythmic Pop as Contemporary Rhythmic Pop. Their Disco exposure marks a significant difference from the MOViN stations, as Disco makes up 13% of the Clear Channel stations' music mix but is almost non-existent on the MOViN stations. In fact, Disco enjoys more exposure than Contemporary Pop Rhythmic on three of the four Clear Channel stations—WISX, KPLV and KSNP.

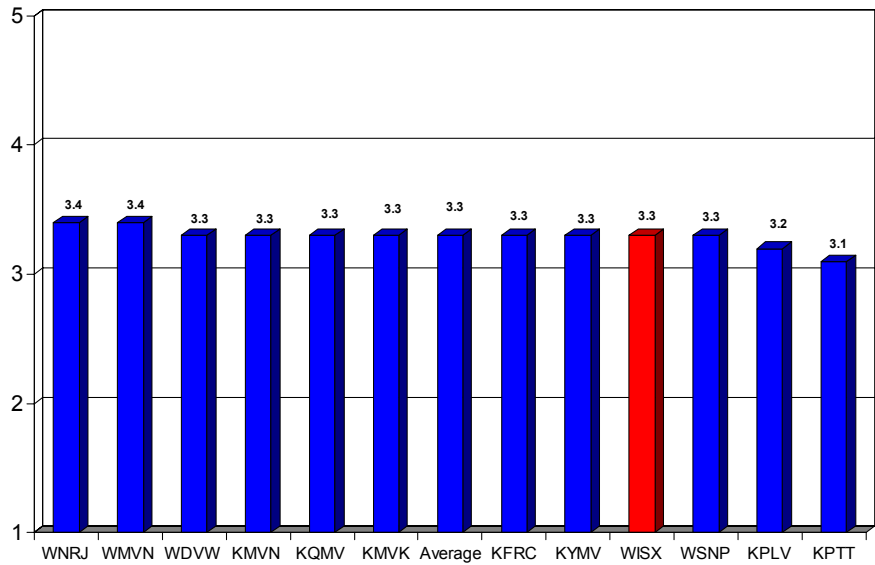


Additionally, Clear Channel stations play more Contemporary Pop and 70s R&B than their MOViN counterparts, while MOViN-branded stations make up that difference by playing more 80s Rhythmic Pop, 90s R&B, 90s Dance and Contemporary R&B. Also noteworthy is that the Clear Channel version of Rhythmic AC plays some Motown, whereas the MOViN stations play virtually none.

ALL STATIONS ARE MID-TEMPO WITH LITTLE VARIATION

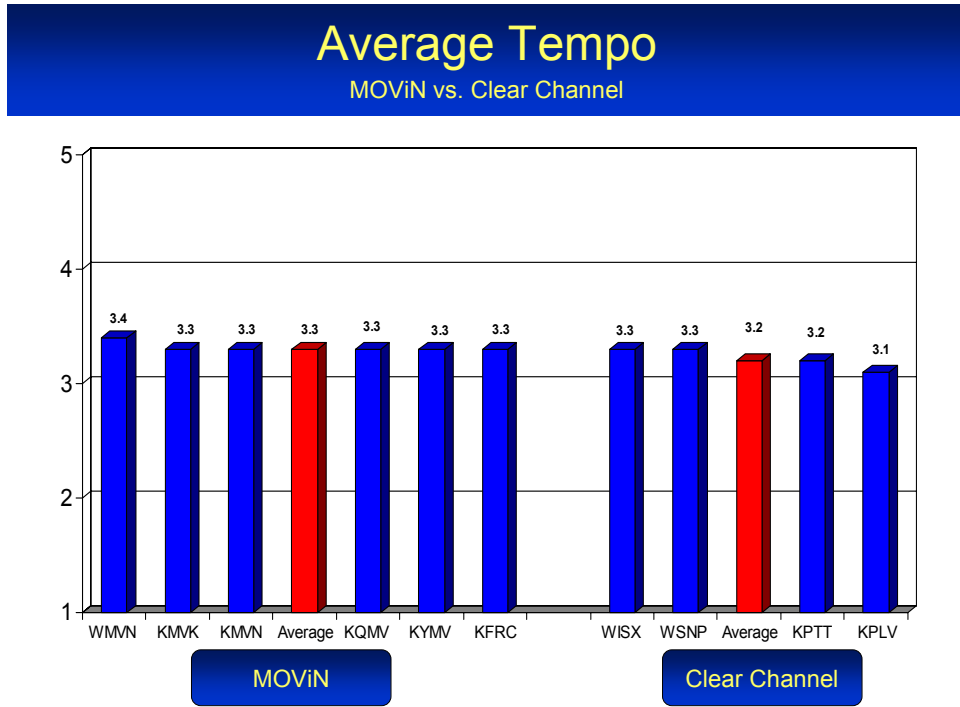
Every Rhythmic AC station in our analysis features a relatively mid-tempo music mix. In fact, on a one-to-five scale where "1" indicates being slow and "5" indicates being fast, the Average Tempo of every station we analyzed is between 3.1 and 3.4. Eight of the 12 stations monitored have an Average Tempo of 3.3.

Average Tempo



Coleman's Early Peek at Rhythmic AC
October 2006

We also observe consistency in terms of Tempo between the MOVIN' and Clear Channel stations. The MOViN stations have an Average Tempo of 3.3, just slightly more uptempo than the 3.2 Average Tempo of the Clear Channel stations.



Coleman's Early Peek at Rhythmic AC
October 2006

RHYTHMIC AC: A FAIR DEGREE OF CONSISTENCY

Although this format is in its infancy, there are some basic conclusions that can be drawn regarding the basic music attributes of Rhythmic ACs. The most notable is the relative consistency of the stations, especially the MOViN stations. It will be interesting to see whether this consistency continues as these stations presumably conduct more research and face responses from their competitors in the coming months and years.

Coleman will continue to monitor the progress of these stations and any others that enter the Rhythmic AC arena. We welcome your feedback on this analysis at ColemanInformation@ColemanInsights.com.

APPENDIX: Coleman Music Monitor Analysis Details

To complete this analysis, Coleman utilized Mediabase music logs for each station. All of the music logs covered the 6 AM – 12 Midnight daypart for September 27th, 2006, except for KMKV/Dallas, which we monitored on October 3rd, 2006.

We matched every song played on each station to the music database we use for our FACT[®] Strategic Music Tests. This database includes virtually every song that is played on American commercial radio stations, with each title having a texture or Sound Code, a Tempo code and its year of release.

The following pages include station-specific details from our analysis, covering the stations listed below:

Calls	Market	Name	Owner
KMVN	Los Angeles	MOViN 93.9	Emmis
KFRC	San Francisco	MOViN 99.7	CBS
WISX	Philadelphia	Philly's 106.1	Clear Channel
KMKV	Dallas	MOViN 107.5	CBS
KQMV	Seattle	MOViN 92.5	Sandusky
WMVN	St. Louis	MOViN 101.1	Bonneville
KPTT	Denver	95.7 The Party	Clear Channel
KYMV	Salt Lake City	MOViN 100.7	Simmons
KPLV	Las Vegas	93.1 The Party	Clear Channel
WNRJ	Norfolk	Energy 106.1	Sinclair
WDVW	New Orleans	Diva 92.3	Citadel
WSNP	Rochester	Snap 107.3	Clear Channel

