



ARE NOVELTY SONGS A TICKET TO RIDE THE RATINGS ROLLER COASTER?

By Jaye Albright and Michael O'Malley

Innovative, fresh, creatively-themed songs have always been a big part of the appeal of country music, bringing humor and serious value statements that often seem so 'different' from the majority of the mass appeal music surrounding them on the playlists and charts they stand out so much that some fans turn up the sound when they come on and others change the station. This has been true, from Jack Guthrie's "Oklahoma Hills" when it was released in 1945 and spent 19 weeks on the Billboard Top 40, to "I'm Moving On" in 1950 by Hank Snow, to 1955's "I'm In The Jailhouse Now" by Webb Pierce, 1962's "Wolverton Mountain" by Claude King, 1975's "Convoy" by C.W. McCall, "Coward Of The County" in 1980 by Kenny Rogers, 1992's "Achy Breaky Heart" by Billy Ray Cyrus and hundreds more.

In fact, many of these 'stand-out' songs have been the biggest hits of the years, and even the decades, they were released, a great number of which charted at #1.

As with all things in the music business, success breeds more success. As artists and songwriters score with novelty songs, others are tempted to emulate them, making some years boom times for creative, buzz-driving novelties and other years bust times for the format because of the over-abundance of tacky and tasteless exploitation songs.

2005 and 2006 have seen a literal doubling of the percentage of the number of novelty ditties on the charts when compared to the music balance of the early 2000's.

What impact is this explosion of American soldier, drinking, religious, topical, humorous parody and other out of the mainstream mass appeal musical themes having on our audience shares? A&O track Arbitron national 25-54 format shares and our weekly proprietary current music research over the last few years to find out.

It's not your imagination. Country playlists currently contain songs with Jesus taking the wheel, Tequila making clothes fall off and Honky Tonk Badonkadonks.

Male superstars get drunk so they can be somebody and then wonder what they were thinking, offer fries with all of that and then look for some beach to do it at.

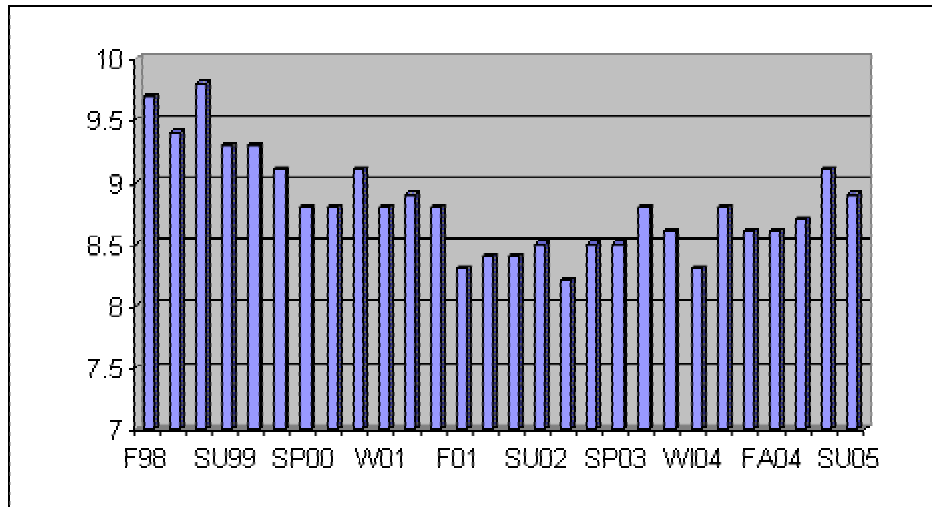
Females look for an alternative fuel in kerosene, try being a politically incorrect corn fed redneck woman while at the same time trying to fix a busted give a damn, and on and on...

And, of course, the success of so many of these very unique, serious, topical and fun lyrical and melodic ideas always seems to bring cloning. Hopefully, you're smart enough to play the good novelty songs and avoid the weak wannabees, but is it time to start avoiding even the good ones in the interest of conservatism, moderation, variety and balance?

Looking at the top 100 songs of the last four years, it's obvious that we have still not yet seen the end of this trend (or is it a fad?). What impact is this having on our ratings?

To find out, A&O logged onto www.arbitron.com and clicked on the national format ratings in all of the continuously-measured markets. We focused on country's traditionally-strongest target cell, adults 25-54. What we found looked like a somewhat bumpy ride, with ups and downs, highs and lows, trending from 1998 to the first three rating periods of 2005.





This report for an average of all of the measured country stations' total adult 25-54 shares is based upon all continuously measured radio metros nationally. Copyright © 2006 Arbitron

Country format 25-54 shares have been wobbling in a range from 9.8 to 8.2 for the last seven years. Is there any evidence that potentially highly polarized or highly burnt novelty songs have a role in those fast drops in our ratings roller coaster?

To find out, we looked at total positive plus total favorite scores compared to the total negatives on the same songs in national averages of our client stations music research for the top ten testing songs being played just as the best and worst books for the format according to the ARB national averages.

BAD BOOK

By the Spring of 2000 country was seemingly bottoming out at an 8.8 25-54 average share, down from the 9.1-9.3-9.3-9.8 trend for the previous four books.

The best testing nine titles (a potential power rotation category) just a few weeks after that book ended contained one novelty/remake which had slightly elevated negatives when compared to the others:

+	ARTIST	TITLE	-
88	Chad Brock	Yes	4
83	Clay Davidson	Unconditional	4
81	Lonestar	What About Now	4
80	Brooks & Dunn	You'll Always Be Loved By Me	5
80	Alan Jackson	It Must Be Love	3
76	Lee Ann Womack	I Hope You Dance	8
75	Eric Heatherly	Flowers On The Wall	13
75	Reba McEntire	I'll Be	7
74	Keith Urban	Your Everything	4

July 6-12, 2000 A&O National Weekly Tracking +: % Total positives, -: % Total negatives

You might call "Yes" and "It Must Be Love" novelties too from a lyrical and sonic point of view, but the fact that listeners rated them universally positively with almost no negatives convinced us that they were not the cause of any TSL losses that might have been created by burnt or highly polarized songs.

For rock or pop format programmers reading this, it must be pointed out that the high levels of negatives and polarity they live with every week are still generally not seen in the country format. In fact, country fans generally like it ALL and seem to have a hard time telling researchers they dislike anything that they deem to fit on their favorite station. So, thought we grant that 13% negatives is still comparatively tiny, it's still two or three times as polarized as everything else the listeners tested this particular week. In fact, we often see polarity develop first as "like a lot" scores start to peak and head downward many weeks before country radio



heavy-users ever start to say “I’m tired of hearing that song on the radio” or “I never liked it.” That is why a metric we like to use is total positives plus total favorite when ranking currents, especially.

GOOD BOOK:

Six months later, by the Fall of 2000 country’s share was back up to a 9.1. Toward the end of that rating period, but before Christmas music hit the airwaves, here is how the power category researched:

92	Brad Paisley	We Danced	4
89	Steve Wariner	Katie Wants A Fast One	8
86	Kenny Chesney	I Lost It	3
84	Dixie Chicks	Without You	6
83	Tim McGraw	My Next Thirty Years	5
81	George Strait	Go On	5
72	Sara Evans	Born To Fly	9
71	Keith Urban	But For The Grace Of God	5
71	Alan Jackson	www.memory	16

November 23-29, 2000 A&O National Weekly Tracking +: % Total positives, - % Total negatives

While it could be argued that Steve & Garth’s “Katie” was also something of a novelty, again, really only one title tested with high positives and mid-teen negatives.

BAD BOOK:

Then, exactly one year later, country nationally had another down book, the weakest share of 2001 capping an 8.8-8.9-8.8-8.3 four book trend.

This time there were two songs in the heavy rotations with elevated negatives, compared to the rest of the top testers. Toby could certainly be termed a novelty, but it’s a judgment call as to why Reba tested with high negs this particular week.

93	Travis Tritt	Love Of A Woman	3
88	Toby Keith	I Wanna Talk About Me	11
86	Aaron Tippin	Where Stars & Stripes	3
74	Jeff Carson	Real Life	4
74	Trace Adkins	I’m Tryin’	5
72	Reba McEntire	I’m A Survivor	11
72	Lonestar	With Me	6
72	Brad Paisley	Wrapped Around	8
72	David Ball	Riding With Pt. Malone	7

November 22-28, 2001 A&O National Weekly Tracking +: % Total positives, - % Total negatives

Meanwhile, Tippin and Ball also had bona fide novelty songs on the list, but they tested very consistently, with low negs. So, it seems that just being a novelty isn’t necessarily a negative for a song in weekly testing.

The fall of 2001 ARB was the first year that country programmers coped with the Post-9/11 impact of news-talk, NPR and Christmas music on AC in a huge way, of course, as well. We were just learning to defend against these things which drew our males and females away for information and Holiday sentiments.

The very next fall country capped a “bounceback” year (8.4-8.4-8.5) by dipping back down to an 8.2.

Here are the power currents and the tests we saw on them right at the conclusion of the Fall 2002 ARB survey period:

76	Chesnutt, Mark	She Was	6
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76	Diamond Rio	Beautiful Mess	6
76	Nichols, Joe	The Impossible	6
74	Dixie Chicks	Long Time Gone	12
74	McGraw, Tim	Unbroken	5
72	Vassar, Phil	American Child	7
72	Urban, Keith	Somebody Like You	5
68	McBride, Martina	Where Would You Be	9
67	Jackson, Alan	Work In Progress	9

September 12-18, 2002 A&O National Weekly Tracking +: % Total positives, - % Total negatives

Diamond Rio and Phil Vassar had novelty aspects to their hits, lyrically, but the country listeners we saw research on were actually more negative on the piercing vocal characteristics of Martina and the twang of AJ than they were concerned in a negative way by “Mess” or “Child.” The post Iraq war and crossover airplay Dixie Chicks effect was the biggest negative in our best-testing songs during this book, so it’s hard to say that any unusually-negative reaction to our highest testing/most played songs was the cause of a ratings drop.

GOOD BOOK:

And, about the time we were ready to simply say that it’s not our music at all that caused these autumn annual falls and simply blame Christmas music, the country format went UP in the fall of 2003, making it the second best book of the year after a very strong summer (8.5-8.5-8.8-8.6).

83	Jackson, Alan	It's Five O'Clock Somewhere	6
76	Bentley, Dierks	What Was I Thinkin'	6
76	Jewel, Buddy	Help Pour Out The Rain	5
74	Chesney, Kenny	No Shoes, No Shirt, No Problem	8
72	Allan, Gary	Tough Little Boys	6
70	McGraw, Tim	Real Good Man	10
67	Walker, Clay	A Few Questions	7
65	Currington, Billy	Walk A Little Straighter	8
62	McBride, Martina	This One's For The Girls	10

September 11-17, 2003 A&O National Weekly Tracking +: % Total positives, - % Total negatives

You could certainly say that at least half of the best-testing powers we all played during this book were ‘novelty’ in one way or another, and yet this group of ‘edgy’ songs was all unique, fun and emotional enough in country values that they may have not only not hurt our performance, but helped it. This is the book when programmers started to see that and may have become more accepting of polarizing songs in larger numbers in even our power categories.

BAD BOOK:

Then, next book, (Winter 2004), country shares slipped backward to an 8.3.

75	Jewel, Buddy	Sweet Southern Comfort	5
73	Chesney, Kenny w/Uncle Kracker	When The Sun Goes Down	6
73	Montgomery, John Michael	Letters From Home	6
72	Walker, Clay	I Can't Sleep	7
71	Rascal Flatts	Mayberry	6
70	Evans, Sara	Perfect	5
70	Black, Clint	Spend My Time	4
70	Lonestar	Lets Be Us Again	5
69	Bentley, Dierks	My Last Name	6

March 25-31, 2004 - A&O National Weekly Tracking +: % Total positives, - % Total negatives



The best-testing songs during that 12 week survey were several follow-ups (clones?) in the wake of fall's successful trend and in fact they, like Buddy Jewel's second hit or the Chesney follow-up to Jackson and Buffet's duet tested even better than the originals did, with fewer negatives.

We all spun "Letters From Home" for many, many weeks and, yet, never saw significant polarity on it.

The Clay Walker, Rascal Flatts, Clint Black, Lonestar and Dierks were also not their best songs, yet the audience response seemed quite acceptable, comparatively, when they rated our music.

GOOD BOOK:

Which brings us almost up to date. Arbitron has the first three books in their national formats database for 2005 now and our 2005 three book 25-54 trend is 8.7-9.1-8.9. Here's how our national research looked on our top testers right at the end of the spring ARB survey:

77	Keith, Toby	As Good As I Once Was	3
75	Urban, Keith	Making Memories Of Us	4
74	Bates, Jeff	Long Slow Kisses	6
72	Trick Pony	It's A Heartache	10
71	Bentley, Dierks	Lot Of Leavin Left To Do	4
70	Rascal Flatts	Fast Cars & Freedom	4
68	Sugarland	Something More	5
67	Shedaisy	Don't Worry Bout	6
66	Worley, Darryl	If Something Should Happen	7
66	Paisley, Brad	Alcohol	8

June 23-29, 2005 - A&O National Weekly Tracking +: % Total positives, - % Total negatives

We show the data on ten of them this time because if you judged the Paisley purely on lyric content you might have said that it was an edgy title, and it certainly was tied for #9 in positives, failing to make the power category this week due only to slightly elevated negatives, the second highest among these top-ranked tunes.

So, based on this sample, it may be said that as long as the audience accepts and loves them, the more 'novelty songs' in power rotation, the better the ratings.

Frankly, we won't go that far. But, it does seem that as long as the country audience loves them, novelty songs – the kind of music you can't get on any shared-cume station – may actually help country compete for shares, and certainly don't see to be hurting at the levels we played in the spring and summer of 2005.

NON-MUSICAL CONTENT COULD BE A CULPRIT

Our ups and downs as a format from book to book seem to have more to do with Christmas music, major news events, and other cultural trends which positively and negatively affect formats competing for adult ears.

As A&O reviews Fall 2005 books in both the U.S. and Canada we have been seeing an alarmingly high percentage of listening being credited to stations "not in the book." Canada's CBC strike last fall was a boon to AM news/talk in many markets. In the U.S. we are aware of one market where 23.7% of all SHARES for women 25-54 went to stations not listed in the "in the book" option in Maximiser. That was nearly a quarter of all shares for this demo!

That these numbers were driven by TSL rather than cume is better news than had it been the other way around. Still, it's a cause for concern when this high a percentage of shares is "taken off the table" for commercial broadcasters.



The best defense against this is increased cume and a concerted effort to increase the entertainment value while decreasing the cost of listening (i.e., more reasons to tune in – content - and fewer reasons to tune out - reducing least-desired elements).



Jaye Albright

Jaye Albright is a 40-year broadcaster with a experience in all areas of programming, research, sales and management.

She is a partner with her longtime business associate Michael O'Malley in country radio's #2 ("we try harder," she promises) consultancy, Albright & O'Malley.

One of radio's most-honored consultants of 2003, she was named Billboard/Airplay Monitor's Country Radio Consultant/Group PD of the Year and also was honored by Radio Ink Magazine as one of the Most Influential Women in Radio. She is also a member of the Nevada Broadcasters Hall of Fame.



Mike O'Malley

Michael O'Malley has been consulting country radio stations since 1992. His past and present clients include Clear Channel, Beasley, Journal, Triad, New South, SFX, Big City and others.

Prior to consulting, Mike spent five years as Program Director of NBC's WYNY in New York City, launching it as a country station in 1987. He has also programmed stations in Baltimore, Washington, DC, and a number of other large and medium markets. O'Malley was also National Research Director for a major chain in the mid-80s.

