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NASH

PUBLICATION FOR 25 YEARS

Keith
Anderson

**INSIDE
THE
SPINS**

Large
Mid-Size
Small

4TH ANNUAL
**COUNTRY
BREAKOUT**
AIRPLAY AWARDS

PLUS!

Artists
Impacted
By New
Business
Models

**Secondary
Radio Blog**

- Market Competition
- Earning Listener Love
- New Artist Poll



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Becky Priest
Billy Ray Cyrus
Blair Redford
Buddy Jewell
Carrot Top
Charlie Daniels
Cody Canada
Cowboy Crush
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Darla Perlozzi
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Debbie Johnson
Del Gray
Doug Davidson
Duane Allen
Dwayne O'Brien
Duane Propes
Dierks Bentley
Grady Cross

Howard Bellamy
Jeremy Plato
Jerry Douglas
Joe Bonsall
Joe Diffie
Judith Chapman
Kate Lindner
Little Texas
Miranda Lambert
Oak Ridge Boys
Pam Tillis
Porter Howell
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The Spirit of America Tour is now booking for 2006, it's fifth year. If your tour has a gap let the Spirit of America Tour fill that opening with an enthusiastic audience at one of America's stateside Military Bases. The Tour will cover all of the expenses for that show. Remember...

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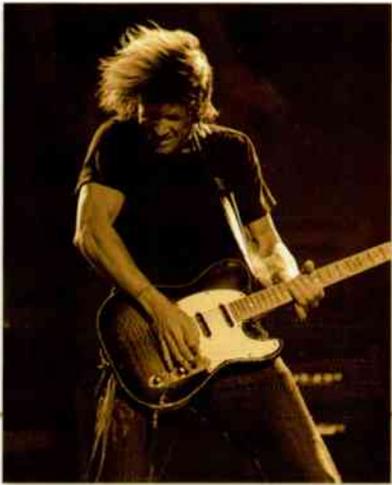
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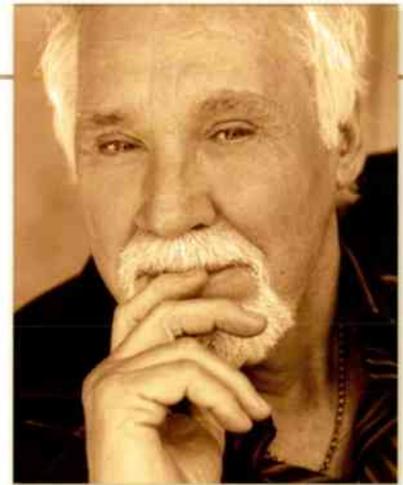


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Top 5 CMT Top 20 Countdown

Top 15 *Billboard* Top 200 Album chart

Top 20 selling iTunes single (all genres)

...over 1 MILLION scanned



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On The Cover

Keith Anderson

Current Single & Video: "Every Time I Hear Your Name"

Current Producers: Jeffrey Steele, John Rich

Hometown: Miami, OK

Booking: CAA/Risha Rodgers

Recent Hits: "Pickin' Wildflowers," "XXL"

Awards/Honors: *Billboard* and *R&R Country's* #1 New Male and Top New Solo Artist 2005; 2006 CRS New Faces Show; *People* magazine's 50 Hottest Bachelors 2005; *Men's Fitness* magazine's "Ultimate Country Star"; winner 2002 Jim Beam Country Band Search

Special TV/Film Appearances: *Today Show*; *Access Hollywood*; *Inside Edition*; 2005 Jerry Lewis MDA Telethon; *CMT 100 Greatest Duets*; *Grand Ole Opry Live*; upcoming CMT program, *Unsung Stories*

Birthdate: January 12

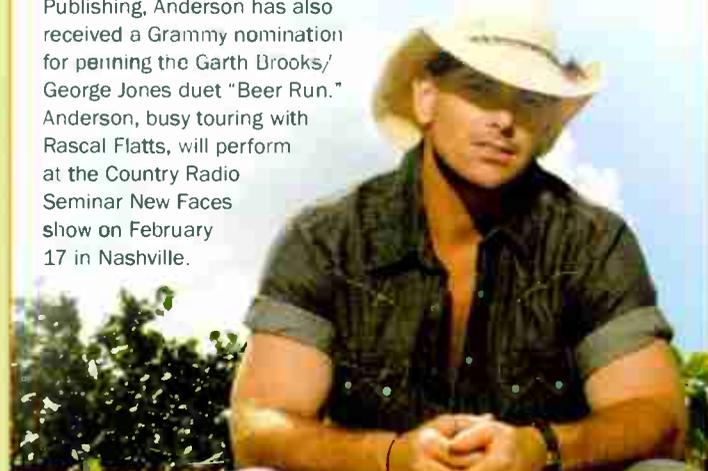
Interesting Facts: Was on the Kansas City Royals draft list in high school. Started and ran a country music singing telegram business for six years in Dallas called "The Romeo Cowboys"

Outside Interests: "Lately I dream of...sleeping, working out, sleeping, watching the NFL, sleeping... But unfortunately I haven't been able to do any of that in the last year and a half! Ha!"

Musical Influences: Kenny Rogers, Don Henley, Restless Heart, Aerosmith, Garth Brooks, Huey Lewis & The News

Favorite Record(s): Don Henley's *The End of the Innocence*, Restless Heart's *Big Dreams in a Small Town*, Kenny Rogers' *Greatest Hits*, Aerosmith's *Big Ones*

Keith Anderson's debut single "Pickin' Wildflowers" went Top 10, *People* named him one of its "50 Hottest Bachelors," *Country Weekly* also listed him as one of country music's Hottest Bachelors and he had the good sense to choose Jeffrey Steele and John Rich as producers. And don't be misled by the party attitude found on many of the album's tracks—Anderson holds an engineering degree from Oklahoma State where he graduated first in his class with a 3.9 GPA (he also placed second in the Mr. Oklahoma body building competition). "His sound hits home with the core country music audience, with Middle America," says RCA Label Group A&R Sr. VP Renee Bell, who signed him to Arista. "His music makes you feel good." A songwriter for EMI Music Publishing, Anderson has also received a Grammy nomination for penning the Garth Brooks/George Jones duet "Beer Run." Anderson, busy touring with Rascal Flatts, will perform at the Country Radio Seminar New Faces show on February 17 in Nashville.



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COUNTRYBREAKOUT *Airplay Awards*

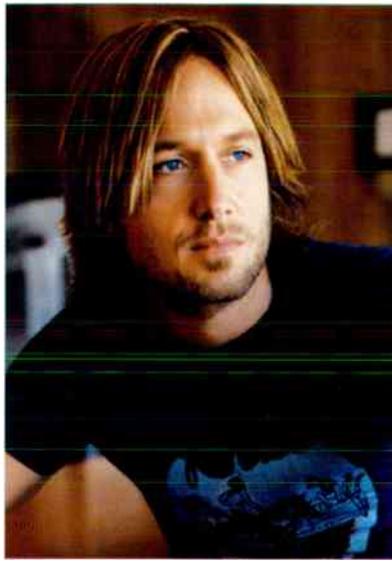
Winners in each category have been chosen from small, mid-size and large labels plus a Reporter of the Year honor was added to recognize a programmer whose dedication and enthusiasm was outstanding. All artist and label awards were tabulated and determined based upon 2005 chart spins. (For a complete methodology discussion see *Inside The Spins* on page 12.)

The list of winners taken as a whole shows dramatic changes taking place across the country music spectrum with new faces and labels rising up the charts and into the minds and hearts of country music fans. Judging from the diversity of musical styles, the state of country music as we enter 2006 appears alive and well.

Congratulations to all this year's winners...

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Awarded to the artist, group or duo that received the most total airplay during 2005



Major Label Artist of the Year

Keith Urban

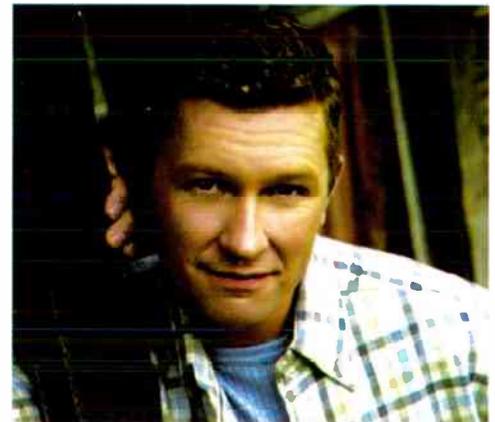
True to the lyrics of his hit song "Days Go By," Keith Urban believes in living each day to the fullest. "These days, I think more about the brevity of our time here. So it seems to me that making the most of every day is *really* crucial," he says. Talented and driven, Urban has definitely made the most of the past year, even walking away from the 2005 CMA Awards with the coveted Entertainer of the Year Award for the first time. Now he adds *Music Row's* Major Label Artist of the Year to the heap of honors. The award is based on *Music Row Country Breakout* chart activity that included a string of hits off his latest album *Be Here*, such as "Days Go By," "Making Memories of Us," "You're My Better Half," and "Tonight I Wanna Cry." As co-producer of the project Urban worked alongside Dann Huff to delve deeper musically and lyrically. "If there was a theme to this album, it would be the big questions I ask just like anybody else: What are we doing here? What's life about?" he explains. For Urban, making the multi-platinum record was an exercise in "getting more comfortable in my own skin." He elaborates, "I hope that there's more of me coming through in the music. I think that comes from getting comfortable with myself as a person and as a musician, but also from getting comfortable in the studio. In the end, all you can do is live and learn."

— Sarah Gilbert

Mid-Size Label Artist of the Year

Craig Morgan

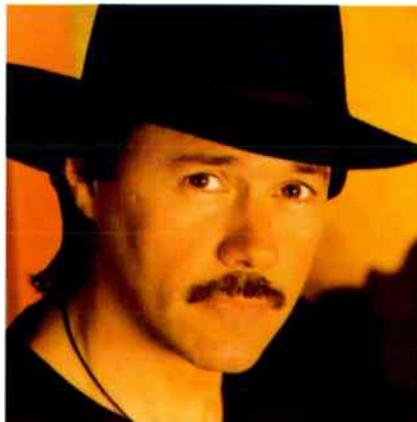
Since Craig Morgan's 2003 breakthrough hit "Almost Home" he has been touching the lives of listeners through self-penned songs shedding light on common everyday experiences. "The point I try to make is that the mundane things aren't so mundane after all," he muses. During a ten year stint in the military that included lengthy overseas deployments, Morgan developed an appreciation for the familiar things at home. When he returned to the States the things he had missed while away seemed much more significant and he shared the sentiment through his music, often writing four or five songs a night. People could relate to Morgan's songs early in his career and it is this connection that has launched him to today's prominent place on the country music charts. Hits such as "That's What I Love About Sunday" from his third album *My Kind of Livin'* helped earn his award as *Music Row's* Mid-Size Label Artist of the Year for 2005. "I'm honored to be working with the best record label staff in the business," says Morgan. "Because of their hard work, faith in me and the music, BBR continues to make great strides and in return has made me a success." The feeling is mutual according to BBR VP National Promotion Jon Loba. "The staff at Broken Bow Records could not be more thrilled with Craig Morgan winning this award," he tells *Music Row*. "This success couldn't have happened to a more deserving and hardworking artist. Thanks to radio for being such a driving force in Craig's career."



— Sarah Gilbert

Small Label Artist & Breakout Artist of the Year

Derryl Perry



Music City Records' recording artist and native Texan Derryl Perry released his debut album *All Just To Get To You* in April of 2005. His blend of modern country, Americana and Texas music has proved a success earning him more CountryBreakout™ spins than any other artist in this category. Bob Heatherly, President/CEO of Music City Records, comments, "I am proud of the hard work that Derryl has put into his career, and equally proud of the people at country radio that will still give the small label a chance to compete." Programmers were right about Derryl. Fans responded to his music and he ultimately received enough spins to be the only artist this year to win in two categories—Small Label Artist and Breakout Artist of the Year. His first single, "Four Nights in Albuquerque" reached No. 43 and accumulated approximately 9,447 spins. "You Will," a single that was featured in a 2002 USA Television Network movie, helped push him into the winner's spot with 13,038 cumulative spins and a peak chart position of No. 36. "We couldn't do it without the fans out at the

shows and in the stores—I would like to thank so many for believing," Derryl explains. "I appreciate *Music Row's* support in our pursuit of bringing my artistry to the public and am grateful for their impact on my career and for their efforts in opening doors for new artists. Thanks to Music City Records and Big Daddy Distribution for allowing me to deliver an album which we could be proud of." Derryl adds, "Radio has been very good to us. I'd like to thank those who have played our singles and who have offered their friendship along the way."

— Michelle L. Ross

Awarded to the record label that received the most spins from all of its artists during 2005



Major Label of the Year

Capitol Records Nashville

Capitol Nashville has long been a force in country music, but the label took home some especially stellar accomplishments in 2005. Boasting a whopping 499,202 spins for the year—more than 100,000 ahead of its closest competition, Capitol ruled the airwaves with a powerhouse roster earning the right to be called our CountryBreakout™ Label of the Year. "I credit a combination of great artists, great songs, and a great promotion team, as well as having incredible synergy with all the departments here at Capitol Records

Nashville," says Capitol Nashville VP Promotion Jimmy Harnen. "Capitol has the finest artists, and we are fortunate to work with some of the best managers, publishers, booking agents, songwriters, and producers in the business." Heavy-hitting Capitol acts on the CountryBreakout™ chart included CMA Entertainer of the Year and CountryBreakout™ Artist of the Year Keith Urban, who clocked 111,114 spins, one of three Capitol Nashville acts above 100k spins. Dierks Bentley also hit it big with radio on his sophomore release *Modern Day Drifter*. Drawing from his single "Lot of Leavin' Left To Do" and current smash "Come A Little Closer," Bentley collected 105,367 spins in total. Rough 'n' Ready Trace Adkins added another 103,902 between hits "Songs About Me," "Arlington," and "Honky Tonk Badonkadonk" from his *Songs About Me* collection. Just shy of the 100k mark with 88,327 spins was Jamie O'Neal, whose 2005 album *Brave* spawned the singles "Tryin' To Find Atlantis" and "Somebody's Hero."

— Jon Freeman

Mid-Size Label of the Year

Broken Bow Records

"I'm so honored and proud that Broken Bow Records has been named Mid-size Label of the Year for 2005," says Benny Brown, President/CEO of Broken Bow Records. "I've been a life-long supporter of country music and fortunate to work with some of the best artists and executives in the business. It was one of my dreams to open BBR and build a team that shares my passion for country music, and this team does that wholeheartedly." 2005 has been a banner year for the Nashville-based label, with Craig Morgan and newcomer Jason Aldean enjoying a big response at country radio. Morgan's success has not waned in the weeks since "That's What I Love About Sunday" conquered the airwaves. The second single from his 2005 album *My Kind of Livin'*—"Redneck Yacht Club"—has also made a huge splash, helping him pick up 77,851 spins by year end. Furthermore, BBR new kid on the block Jason Aldean further sweetened the pot with his commercial breakthrough "Hicktown." Aldean's self-titled debut album has recently been certified Gold by the RIAA, and new single "Why" is currently climbing the charts. "What a way to wrap up 2005," says Brad Howell, General Manager for Broken Bow Records. "On behalf of the entire BBR staff, and our roster of artists, thanks to *Music Row* and the entire Nashville music community for your support. And THANKS to country radio—it wouldn't happen without you!"



— Jon Freeman



Small Label of the Year

Quarterback Records

It was a tight race to the very finish, but after the final tally Nashville-based Quarterback Records has won *Music Row's* small label of the year for 2005. "This wouldn't have happened without the hard work of our artists as well as the experienced staff at Quarterback Records," says Quarterback President Chris Allums. "Thanks also to *Music Row*, which has filled a void in the industry by recognizing and giving a voice to Quarterback and other independent labels which are so vital to our industry." A pair of Quarterback artists made a fine showing in 2005, resulting in a total of 25,953 spins for the label. Michigan cowboy Jay Teter's "Until You Find Your Mr. Right" picked up 12,193 spins last year—nearly half of Quarterback's total—and peaked at No. 40. The rest of Quarterback's spins came courtesy of Nashville duo Hometown News (consisting of Scott Whitehead and Ron Kingery), whose singles "That's Country To Me" and "If I Could" (both from the duo's self-titled 2005 album) peaked at No. 44 and No. 52, respectively.

"This is an awesome milestone to mark everything Quarterback Records worked for in 2005," adds Allums. "In these uncertain times in the record industry, it's wonderful to see the early success of our efforts. This is a great springboard to build on and make 2006 an even better year!"

— Jon Freeman

Awarded to the artist, group or duo whose first single peaked and received the most airplay during 2005

Major Label Breakout Artist of the Year

Sugarland

Jennifer Nettles, Kristian Bush, and Kristen Hall were individually working the Atlanta club scene until they came together as Sugarland and discovered their potential as a band. Together they made catchy country music with a broad appeal and blew up the charts, becoming one of the best newcomer success stories of 2005. Hall has since left the group to focus on songwriting. Since joining Mercury Records and creating *Twice The Speed Of Life*, Sugarland has had several top singles that helped them earn *Music Row's* Large Label Breakout Artist of the Year Award. "Something More" peaked at No. 1 and received 45,002 spins, while "Baby Girl" and "Just Might (Make Me Believe)" each received around 25,500 spins for a grand spin total of 96,721. "This is a band that truly deserves everything that's happened" reports John Ettinger, Jr., the VP, National Promotion of Mercury Records. "Their talent is obvious, and their absolute joy in delivering the music is infectious. I call them a magical bunch, and their magic spreads to everything they touch—the label, the promotion staff, country radio, and now the fans. It's exciting to be a part of it." Ettinger continues, "Many thanks to *Music Row* for seeing the wonder of Sugarland. Things have gone fast over the past year. Sugarland started 2005 as a strong 'maybe' to the industry, and I think it was a lot of hard work by the band and this terrific staff to start 2006 with thousands of fans saying 'yes!'"



— Michelle L. Ross

Mid-Size Label Breakout Artist of the Year

Jason Aldean



When Jason Aldean signed with Broken Bow Records in 2004, he had already been dropped from the roster of another record company and was on the verge of throwing in the towel after five years of trying to make it in the music business. Fortunately he stood his ground and refused to give up. His self-titled debut album has now earned 59,510 spins on the CountryBreakout™ chart, making him *Music Row's* Midsize Label Breakout Artist of Year. "Wow! This is the first award I've received for my music," shares Aldean. "What an honor. I'm fortunate to have such a supportive staff at Broken Bow Records behind me and thankful to country radio and the fans for making this happen!" His first single "Hicktown," peaked at No. 6 with 54,579 spins and was penned by songwriter celebrities Vicky McGehee, John Rich, and Big Kenny. Other songs that received spins on the chart include "Amarillo Sky," and "Why," the follow-up single to "Hicktown." "Being part of Jason's introduction feels like strapping yourself to a rocket and blasting through the atmosphere," explains Jon Loba, VP National Promotion for Broken Bow Records, "he formed an immediate connection with country listeners and all of us at Broken Bow Records are incredibly excited about his spectacular start."

— Michelle L. Ross

Awarded to the CountryBreakout™ Reporter who showed exemplary dedication to country radio during 2005

CountryBreakout Reporter of the Year

Susie Martin

Susie Martin, Music Director of Alpena, Mich. reporter WATZ, wasn't always a fan of country music. "I'm an old rock 'n' roller," she explains. "Once a blizzard kept most people away from a Rod Stewart and the Faces concert, Rod shared his case of champagne with the 20 or so of us who refused to miss the show. I have many stories like that." Her appreciation of country music started as a challenge from her country-loving co-workers in an Ann Arbor fire station. Two weeks of country music later, she became a diehard fan with a great deal of catching up ahead of her. A public speaking job in her hometown Alpena for the American Cancer Society led Martin into broadcasting with WATZ, where she worked her way up to her current position of Music Director. "I look forward to every day at this radio station and listening and choosing the music that we play," she says. It's that enthusiasm and dedication—coupled with the perspective of a true fan—that make her the obvious choice for this award. Martin joined the CountryBreakout™ panel in 2002 and has remained an active participant every week. "What I love about our chart is the fact that we are on the cutting edge, and we have the ability and the passion to break new artists by giving them enough spins that people sit up and take notice," she says. "We should be very proud of that, and I love it! I love the fact that our chart has the established artists and that we are all constantly working to give deserving artists the break they need in this business. It's an everyday challenge, and I feel fortunate to be a part of it all."

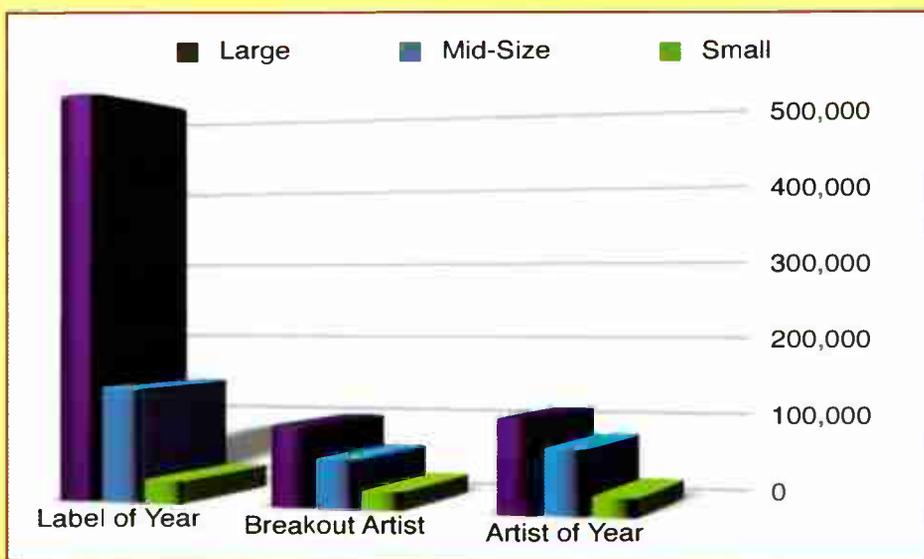


— Jon Freeman

Inside the Spins

by David M. Ross

Nashville's country music industry has quietly been evolving in the wake of major label downsizing and the digital revolution. Three years ago during the birth of Music Row's CountryBreakout™ chart the phrase "independent label" was not highly respected. But that perception is changing fast.



This chart illustrates and validates the decision to divide the CountryBreakout™ awards into three categories. Large, Mid-Size and Small labels operate with different scales, as shown by the graduated bars showing the winning spins in each category by label size.

Three factors—available executive talents, mainstream distribution and artists with built-in fan bases—have greatly improved the odds for smaller label success.

Independent labels, which previously had little or no chance of success playing radio roulette and securing sales suddenly found themselves able to attract unemployed, but experienced label executives. Major label distribution systems realized that stocking independent product could be useful and profitable. And finally a large pool of established artists became disenfranchised as they found themselves cast out from the major label lifestyle.

Why? Because they were no longer able to sell CDs at the gold or platinum levels necessary for profitability in those high-dollar business models. But these artists fit perfectly into business models with lower overhead.

Secondary radio, the heartbeat of the

CountryBreakout™ radio panel, has always been a valuable resource for exposing new talents and reinvigorating careers. Rural radio allows a larger degree of programming freedom than most mainstream market stations which are often severely restricted in what they can play. Therefore, many labels, both large and small utilize this group of individualistic tastemakers to test the waters. Promoting music to radio is expensive, but using the CountryBreakout™ panel to see if you have a winning hand can be like betting with \$5 instead of \$50 chips at mainstream markets.

Award Methodology & Label Definitions

Stated simply, the CountryBreakout™ Awards are determined and totally based upon actual 2005 spins reported by the Breakout™ radio panel. The three award categories, **Artist of The Year**, **Label of the Year** and **Breakout Artist of The Year** are subdivided (this year for the first time) according to Large, Mid-size and Small label divisions. *Music Row* adopted the size divisions this year because they are a true reflection of marketplace realities as the various spin levels show.

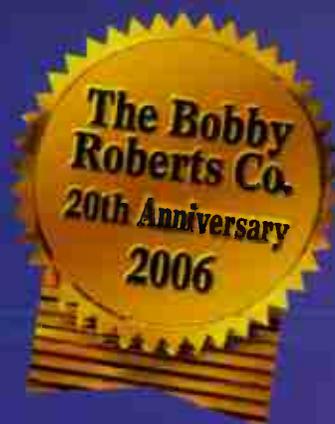
Large labels such as BNA, Mercury, Lyric Street, Capitol and others have multi-national distribution at the corporate level and in-house promotion teams with three or more full-time employees.

Mid-size labels such as Equity, Broken Bow and 903 get product into stores via independent distributors (or independent arms of larger distributors) such as RED, Navarre, Fontana and ADA. They also have in-house promotion teams with three or more full-time employees.

Small Labels such as Music City Records, Lofton Creek, Blue Diamond, GMV

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—Merle Haggard

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and Big3 Nashville have distribution pipelines similar to the Mid-size model, but do not have fully staffed in-house promotion teams (three or more full time employees).

Large Labels

Capitol Records took Label of the Year honors buoyed by spins from Artist of the Year **Keith Urban** and labelmates **Dierks Bentley** (No. 5) and **Trace Adkins** (No. 6). Other artists contributing included **Amber Dotson**, **Chris Cagle**, **Jamie O'Neal** and **Ryan Shupe & The Rubberband**.

Sugarland and Mercury Records

got a sweet reward from programmers that spun this new group repeatedly, earning it the Breakout Artist award by a large margin.

Mid-Size Labels

One company took home all the awards in this division—Broken Bow Records. Armed with a solid staff and a "can do" attitude, this major indie further established its flagship artist **Craig Morgan** and boosted newcomer **Jason Aldean** to Gold status.

Small Label

Competition was close in this division, but Music City Records' **Derryl Perry** crossed the finish line in two categories claiming Breakout Artist and Artist of the Year honors. Perry accomplished the trophy two-step by getting substantial airplay on two singles—"Four Nights In Albuquerque " and "You Will."

Quarterback Records bested all the other small size labels largely on the efforts of singles from **Jay Teter** and **Hometown News**. ■

2005 Artist of the Year

Large Label	Spins	Mid-size Label	Spins	Small Label	Spins
Keith Urban (Capitol Records)	111,144	Craig Morgan (Broken Bow)	77,851	Derryl Perry (Music City)	22,485
Rascal Flatts (Lyric Street)	108,900	Jason Aldean (Broken Bow)	59,510	Jill King (Blue Diamond)	20,729
Montgomery Gentry (Columbia)	106,725	Neal McCoy (903 Music)	53,011	Forty5 South (Tilo)	19,741
Toby Keith (Show Dog/Universal)	105,956	Little Big Town (Equity)	27,860	Last Man Standing (Home Grown)	17,312
Dierks Bentley (Capitol Records)	105,367	Kevin Sharp (Cupit Records)	23,019	Danni O'Neill (GMV)	15,998
Trace Adkins (Capitol Records)	103,902	Mark Chesnutt (Vivaton)	21,385	Wayne Warner (B-Venturous)	15,722
Gretchen Wilson (Epic)	100,822	Alison Krauss (Rounder)	20,006	Chely Wright (Dualtone)	14,830
Tim McGraw (Curb)	100,338	Malibu Storm (Rounder)	8,328	Keni Thomas (Moraine)	14,571
Kenny Chesney (BNA)	97,053	Collin Raye (Aspiron)	8,287	Hometown News (Quarterback)	13,749
Sugarland (Mercury)	96,721	Kevin Fowler (Equity)	3,877	Luke Stricklin (Pacific/Time)	13,548
				Brittany Wells (Spindletop)	13,156

2005 Breakout Artist of the Year

Large Labels	Spins	Mid-Size Labels	Spins	Small Labels	Spins
Sugarland	96,721	Jason Aldean	59,510	Derryl Perry	22,485
Van Zant	64,641	Little Big Town	27,860*	Keni Thomas	14,571
Miranda Lambert	63,995	The Grascals	3,145	Luke Stricklin	13,548
Keith Anderson	59,925			Brittany Wells	13,156
Blaine Larsen	38,985*			Todd Fritsch	11,300

* These artists were technically not eligible (not a first single), but since they were relaunched on new labels we included their results.

2005 Label of the Year

Large Labels	Spins	Mid-size Labels	Spins	Small Labels	Spins
Capitol Nashville	499,202	BBR	139,817	Quarterback	25,953
Arista	386,346	903 Music	53,011	Spindletop	24,517
MCA	364,939	Equity	35,219	Music City	22,485
WBR	319,185	Rounder	35,184	Lofton Creek	21,579
Lyric Street	297,332	Cupit	24,463	Blue Diamond	20,729

Secondary Radio Blog:

Facing Market Competition & Earning Listener Love

by David M. Ross

They're not into the bright lights, long limos and living large...they simply love the music. But these are dedicated men and women who serve their communities at secondary market radio stations across America, rub shoulders with their listeners everyday, and are unique assets to the country music format.

One of secondary radio's chief strengths is its ability to expose new artists which has made them instrumental in the rise of Nashville's mid-size labels. Last year's mid-size success stories—Craig Morgan and Jason Aldean—received early and valuable support from small market programmers and their larger playlists. There can be little doubt that next year's new discoveries will also owe a debt to small market stations such as the reporters on *Music Row's Country Breakout* panel.

We asked our panel to comment on a variety of issues: the balance of power between Nashville labels and radio; competition from cell phones, iPods and Satellite radio; programming; and more. We also polled programmers about their favorite new artists. Many of their answers are not politically correct—but they are honest...

Favorite New Artist Poll

Country Breakout™ reporters were asked, "Name your two favorite new artists." Almost half of our 109 station panel responded, nominating a wide range of acts from large, mid-size and small labels. The popularity of top vote getters **Sugarland**, **Miranda Lambert** and **Jason Aldean** was reflected in the strong spin support each earned during the preceding year as shown in the Breakout Artist Award category

(see page 14). **Todd Fritsch's** music did not arrive until late in the year which effectively lessened his chances to win Breakout Artist honors, but his top-of-mind year-end position indicates he could be a strong contender for next year. Also worth noting, the Breakout panel is not influenced purely by sales. For example, Carrie Underwood who gained a respectable 11% showing is the highest selling artist on the list.



Sugarland	.....25%
Miranda Lambert	.....21%
Jason Aldean	.....18%
Todd Fritsch	.....14%
Little Big Town	.....11%
Josh Turner	.....11%
Keith Anderson	.....11%
Carrie Underwood	.....11%
Jeff Bates	.....11%
Ray Scott	.....11%



J.R. Runyon KWCK Searcy, AR

Right now a lot of the new music coming out of Nashville is really good. The best seems to be those artists that are returning to the roots of country. Our listeners are responding positively to Josh Turner, Jeff Bates, Sugarland and Carrie Underwood and still embracing some of the "Southern Rock" sound, but are showing some weariness with the Big & Rich over the top sound. The trick, as always, is finding ways to communicate with the up-and-coming artists, but it's also about getting respect not disdain from the bigs—the Straits and Jacksons of the world who have forgotten what got them the success they now enjoy. Radio's biggest advantage is that it is local.

Valeri Ferrari KUUB Reno, NV

We are super lucky to have complete control of our music. It starts with our owner. He says music is an art, a gut feeling, not always a "science". We combine that attitude with a fantastic consultant (the science part) and keep

it fresh and fun! I love the new mid-size labels. I actually created a new category to showcase the "indies" and mid-size labels. I am passionate about MUSIC. Label size doesn't matter, I believe in giving artists that are really working hard on their dream of "getting on the radio" a chance! Not all make it on the air, but some do! (At least the station isn't programmed by "Simon"...there wouldn't be anybody on radio at all!) Country is back and cooler than ever!

Sheila Kirsch KGRT Las Cruces, NM

The ascent of more and more superstars to the executive chair is an interesting trend to watch. If it works, then the balance of power could change, and artists might have a new goal to strive for. They'd no longer be satisfied just being a multi-platinum, A-lister working for someone else. Artists would feel that once they achieve a certain status, they'll be owed a label. And with that goal in mind, artists and management could spin a career from the very beginning intent on ditching the big guys as soon as the time is right. It could make for some pretty messy negotia-

tions among the lower ranks. With respect to the smaller labels remember: Good music can be produced on a budget just as easily as a super-sized checkbook can produce crap.

Terry Harris WKDP Corbin, KY

So far, I'm not impressed with satellite radio. Until they start to make money, I don't fear them because no company can continue to grow without making money. I do worry about iPods and computers taking away our audience, especially with the younger crowd. We have a whole generation growing up without radio. When I was young, the radio was the only place to hear new songs, but my kids do not depend on radio for their music. I worry that in 5-10 years, these kids might forget what radio is. • Bring on the new labels. For 30 years I've been in radio and had to deal with the Nashville record companies and been told I'm not important, my station is nothing and that the record companies didn't need me. More labels means our format can hear more new artists and I like their hungry attitudes.

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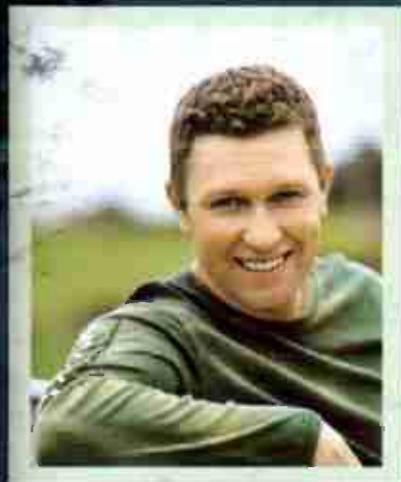
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Mike Thomas KFAV-FM Warrenton, MO



If we are doing our jobs properly and programming what the public wants to hear, then we shouldn't have to worry about iPods, cell phones or satellite radio. The key is to keep the originality

in the programming and one of the ways we can do this is by truly breaking new artists and giving listeners an opportunity to hear music they can't hear anywhere else. Keeping the music fresh and staying in touch with the wants and needs of the listener is why small market radio is currently succeeding where large markets fail. In my humble opinion, this same philosophy can apply to the new technologies coming into our world.

Anonymous Programmer

(Concerned about job security)

We're becoming dangerously close to being over-consulted. I've had four consultants over the last six years, and each of them has

narrowed the playlist. We've gone from being told you can safely play 37 records, to 35 to our current 30. But when you factor in that many of our currents are already recurrent everywhere else, you're effectively only playing about 25 new songs. (Adult contemporary, here we come.) When you end up with local GM's who follow the consultant and GM's mandates, with little or no input from Ops Managers and PD's, you end up with the position of Program Director becoming no more than Program Facilitator. Yet who are the ones in the trenches every day? Who are the ones talking to listeners? Who are the ones auditioning every new CD that comes across their desk? Who are the ones facing listeners at remotes and station events, getting direct feedback? Consultants provide us with useful research plus programming and imaging ideas. But music should be left solely to the LOCAL Program and Music directors. The consultant can still be the PD's best tool to win. It's no coincidence that our station has had its best numbers in the last three years when the consultant was working with me on marketing and developing air talent and letting me handle the bulk of the music work. Over reliance on our core artists is another big issue. When 65% of your main gold category consists of songs from just six acts, you've got a problem. The labels complain to us that they can't break new acts. They're right. When your mandate from the GM is to play what the consultant says, which is basically that less than 10 artists matter and only six have the "staying power" to have their songs played as golds, it's pretty tough for the new acts to break through. Yet here the PD sits, again, in direct contact with the listener who is telling him or her they want to hear that new Shannon Brown or Jeff Bates. Today we're too careful, too conservative, too researched, too consulted, too much jukebox

and too much reliance on safe songs and acts. No passion=No guts + No risks.

Lee Richey WCJW Warsaw, NY



WCJW is a family-friendly radio station, so songs like the new Rhett Akins or Jace Everett can be problematic for us. Edited versions don't help much with songs that deal with very adult

content. It's just not something we care to have kids exposed to, and would hate to ever have parents worry about their children listening to CJ-Country. • iPods, satellite radio, and/or cell phones aren't in direct competition with broadcast radio. Nothing will ever replace hopping in the car and powering up the am/fm tuner! • Being a secondary size station, most major labels aren't too concerned with what I'm playing up in western New York. However, over the past year or so, I have had a lot more music calls from majors. Could that be connected with chart success from some of the mid-size artists? Personally, I enjoy being able to get through to the smaller labels and have developed some great relationships with my reps. Of course, for artists it's a great thing. To be signed to a label like BBR and know that you can still land a No. 1 hit, like Craig Morgan.

Shelly Marx WWBE Selinsgrove, PA

Mid-size labels are great when their product is good, they care about the artists and get behind them. That means a lot in my eyes. • New technology (iPods, cell phones, etc.) poses a threat which is growing everyday. Satellite

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radio, for instance, offers something radio has been lacking—they play more of a variety of tunes, and feature concerts. If radio starts paying attention and becomes more open-minded about what hits the airwaves (not playing the same songs every 4 hours) we may have a chance to grab listeners attention. Then they might ask themselves, "Why pay for something when I have it better with radio?" Worrying about iPods or cell phones is like asking if CD's pose a threat. Yeah, some people listen to CDs all the time in the car, but again if we give them a reason to tune in—they will.

Christie Matthews

KDXY Jonesboro, AR



Cell phones may be radio's biggest competitor. Driving down the road, you see so many drivers with a cell phone to their ear and they can't be listening to the radio at the same

time. We as an industry have to focus on our craft. Study what we are doing to keep

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audiences and what we are doing to run them off in search of a substitute. We have gotten our feelings hurt and egos bruised because other than going to your favorite record store and purchasing the music, we used to be the only available option. I compare it to when a radio station is No. 1 for years, gets comfortable and coasts. Then out of nowhere a new station pops up and takes them down before they know what hit them. We can't sit around and sulk, or get defensive pointing out what's wrong with iPods and satellite radio. We have to be proactive, get back on the offensive and come up with things to make radio better than it already is. The fact of the matter is, these new technologies will continue to be developed. Just as new stations will pop up in our market, threatening to take yet another piece of the pie. • It's exciting to see these new mid-size labels doing well. The success of Craig Morgan on Broken Bow is incredible; as is the buzz on Equity's Little Big Town. Incorporating the creative input from their artists may be what sets these mid-size labels apart.

Kit "KC" Caldwell
KCLQ-FM Lebanon, MO

Country is the new rock and roll for the baby boomer generation. It's not so twangy anymore. Classic rock stations have been playing the same songs for 30 years. Country acts like Big & Rich have switched a lot of rock listeners on to something new—country. The power is changing hands to new acts with more rock than country.

Patrick John
KNCQ-FM Redding, CA



It's like putting into the clown's mouth in miniature golf, except with 50 balls all at once. It's a constant battle to make sure you're getting it right for the largest possible number of listeners. (They listen to us, so we had better listen to them!) There are so many new artists, plus many B and C list stars lingering or making the transition to smaller labels. Only a few will actually make it into the hole.

As far as sales go, the constant battle over the number of commercial minutes rages on, as does the need for more, more, more NTR (non traditional revenue). • The mid-size labels are great! Specifically, we've dealt with Broken Bow and the crew there is fantastic. Simply put, they are accessible and turn out great artists and records because they're willing to put the needed time and effort into each artist and project. Some of these labels will become huge someday. I hope they don't forget what helped them get there.

Susie Martin
WATZ Alpena, MI



Mid-size labels have more time to spend on their artists. And now it's been proven artists can have a No. 1 hit—across the board—on a mid-size label. • We've been on the air for 60-years and are the flagship station for this area. When we say, "live and local," we mean it. But we still must remain on top of



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Troy Eckelhoff

KTCS Fort Smith, AR

Mid-size labels are great for two reasons. Unlike some (not all) of the majors, they still look to radio for help and feel they need us as much as we need them. Secondly, mid-size labels are proof to the small labels that if you choose your artist and songs well, you can work your way up to the level of major label status. Look at Broken Bow. It took only one artist (Craig Morgan) to boost them and now they have another on the way with Jason Aldean.

Ryan Dobry

WLDR Traverse City, MI

Everything out there that gives folks an opportunity to listen to something other than local radio is competition. • What label an artist is on should not determine airplay. If you're passionate about the music you will take the time to listen to everything available and play the best sounding songs. Those mid-size labels should do fine as long as they produce hits.

BJ Stone

WXCL Peoria, IL

The balance of power isn't really changing in Nashville, the majors still have the money. I'll add, however, that the first indie or mid-size that goes back to a full staff of label reps LIVING IN THEIR REGIONS and NOT CALLING FROM NASHVILLE will win a large chunk of the sales battle. Personal contact from the labels to the stations outside the major markets has been lost. The reps aren't given the time or budget to travel to the Wichitas, Peorias, Cedar Rapids and Fargos of the world. They can only call. Put a rep back in Kansas City and let him/her travel to these stations and sell your songs to those PD's. In many cases the product that some of these smaller labels put out is very good. But much like radio, the marketing lacks. You let someone with a passion for good music (such as myself) go into any small or medium market, make a personal appearance, buy a guy some lunch and talk music and he's going to do his best to get that record on the air. At the very least he's going to move it 20 notches up the stack just because "that label sent a guy to see me." And (insert big smile here) if he's not overly-consulted, it'll surely get on the radio. ■



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The Impact of New Business Models on Artists

by: Michael Milom, Esq., Bass Berry & Sims, PLC

A minor Greek philosopher is credited with first observing that "Change is the only constant". That principle has never been more evident than in the recording industry during the last few years.

We are all familiar with the recent economic challenges faced by major record companies and many independents. Whether those challenges resulted from illegal file sharing, dramatically increased competition for the limited discretionary income of targeted consumers, or global market conditions, record companies are experiencing their most difficult struggle for profitability in the history of the industry.

Much has been written in these pages and other publications about these challenges and the "new business models" being employed by record labels to counter the trend toward diminishing profits. Those new business models have been characterized by two simple strategies. First, to increase and diversify the labels' products and revenue sources. Second, to increase the profitability of existing products and revenue sources. While these business models and strategies have been widely discussed, there has been surprisingly little discussion of their impact on recording artists—the record companies' creative partners in this endeavor. A detailed examination of the impact of the new strategies on recording artists is beyond the scope of this article, but we will consider a few of the most important changes that

implement these strategies in recording contracts currently being offered by the major and many independent labels.

"The artist may receive as little as 12% of the net revenue rather than the 50% that would have been payable under most contracts a few years ago."

Increasing & Diversifying Revenue Sources

1. Requiring artists to create new products for the mobile communications market. These new products include "voice tones" (artist spoken word clips used for everything from phone ringers to subscription wake up messages), ring backs and electronic wallpaper for computers. These products are frequently characterized as "promotional" (i.e., no royalties paid) but usually are not related to a particular single or album and are intended to generate revenue for the company.

2. Sale of advertising and merchandise on artist websites. Labels now require that they own and control the

artist's "official" website and may generate revenue from those websites by selling advertising. Many contracts also permit the sale of merchandise created by the label using album artwork or other label owned materials. The artist's participation in this revenue, if any, is a matter of negotiation, but neither of these activities would have been permitted by most recording contracts negotiated 3 to 4 years ago.

3. Licensing of album artwork. Album cover artwork incorporating the artist's name and likeness is licensed for use in connection with products other than records.

4. Requiring that artists pay a portion of their touring and/or merchandise revenue to the record company. The amount of the required label participation varies widely, but this new requirement significantly reduces a source of income that has previously belonged solely to the artist. Touring and merchandising revenue has been particularly important to artists in the early years of their careers because they cannot expect to receive royalties from record sales because of recoupment by the label of recording, video production, independent marketing, promotion and other costs from their royalties.

5. Increasing the market for authorized electronic sales and similar electronic revenue sources such as subscription music services. While expansion of this market would appear to benefit the artist financially, the new artist's proportionate participation in revenue from such sales is often significantly lower than that derived from a comparable sale in CD configuration. So as electronic sales increase and CD sales diminish, the artist's proportionate share of the record label's revenue from the artist's recordings will be reduced.

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Increasing Profitability From Existing Revenue Sources

1. Reducing artist's income participa-

tion from sales of single and multiple tracks via electronic sales. As indicated above, by diminishing an artist's proportionate participation in electronic sales, the company increases the profitability of such sales for the company. Many contracts still apply deductions for packaging, free goods and returns reserves in calculating an artist's royalties from electronic sales even though there are no packaging costs incurred, no free goods offered or return rights granted by the company or its licensee in connection with those sales.

2. Increasing the percentage of record company expenditures that are recoupable from artist. Whereas labels have traditionally recouped 50% of independent marketing and promotion costs from artist royalties, many labels are now requiring that the artist bear a greater percentage of those costs and often attempt to shift other costs traditionally borne by the label to the artist's side of the ledger.

3. Reducing artist's income partici-

pation in revenue from licensing the artist's recordings or other rights.

The participation by the artist in a label's licensing revenue is a matter of negotiation. However, traditionally, when recordings were licensed by the company for products other than sound recordings, the net revenue received was divided equally

“Labels are now requiring that the artist bear a greater percentage of those costs.”

between the label and the artist. No more. In many contracts offered by record companies to new artists, the artist's share of that income is significantly less than half of the net. As an example, in contracts using

suggested retail price as a royalty base, the artist may receive as little as 12% of the net revenue rather than the 50% that would have been payable under most contracts a few years ago.

While there are many other examples of changes in new artist recording agreements resulting from the labels' efforts to maintain or preserve profitability, those discussed above are some of the most common in the contracts being offered by many of the major labels and many independents. The debate will continue between record companies and artists regarding the proper or fair division of the revenue from sales and other exploitations by a label of a recording artist's talents, but the disparity in bargaining power between record companies and new artists makes it imperative that artists and their representatives be aware of the changing contractual landscape and of the commitments being required of new artists as labels try to survive in this rapidly changing market environment. ■

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A Lighted Match: BILL LUTHER

by: Larry Wayne Clark



Hits/Cuts/Chart Action: "Who You'd Be Today," "What I Need To Do," Kenny Chesney; "My Best Friend," "Things Change," "How Bad Do You Want It," Tim McGraw; "Let's Make Love," Tim McGraw & Faith Hill; "Was That My Life," Jo Dee Messina

Birthplace: Portsmouth, VA

Years In Nashville: 18

Publisher: BMG

Favorite Song You Wrote: "There Will Come A Day," a gospel song that Faith Hill cut

Favorite Song You Didn't Write: "Wichita Lineman," Jimmy Webb; "The Song Remembers When," Hugh Prestwood. (I heard that and I experienced two emotions: one was fear; the other was fear! It's a song I regard as a watermark.)

On What Instrument Do You Write:

Guitar, occasionally piano or banjo

Influences: Mark Heard (he died years ago—wonderful writer!), Tom Douglas, Jimmy Webb

Advice To Writers: My advice is write what you know. Because the stories that we've been through, we know the details. And songs need details. Not all lyrical detail is picture, some of it's emotional, like: "It was like a lighted match had been tossed into my soul."

Little Known Biographical Fact: There's a real good chance I'm related to Martin Luther!

Issues Facing Songwriters Today: I think they're very serious, like the things that the NSAI concerns itself with legislatively. It really does all begin with a song. After reading *Hit Men* I think back to truly talented African-American singers and songwriters who were literally just ripped off, and I say to myself, "Bill, you cannot complain." They paid for a lot of what we have today.

A man who waxes enthusiastic about many things—music, family, religion and remote-controlled airplanes among them—Bill Luther is also a bona fide movie buff, sprinkling our conversation with film references and quotations. "I love movies. I remember when I left *Forrest Gump* I thought I was gonna go home and write ten songs!" He believes that great screenplays and performances illuminate the moral issues of our times: "I think one of the great things about America is that we're open and honest, even if we're wrong. Even if the left is pulling at the right, there's this open air struggle going on that the whole world can see. Maybe it's not always good to air your laundry, but we're open about the struggles and how even good people make mistakes. And how in the end there's redemption for all of us if we're willing to believe."

Bill's story began in Virginia, and music runs constant throughout. "I was a fan first. When I was a little kid I used to sing songs walking to the store. I didn't even know what I was saying but music would make me feel good, you know. Like a good book, it would take you someplace different. I would tune in stations on my little AM radio. I remember one night I got the Opry on that radio, with Martha White Flour and everything. People said, 'There's no way you picked up that station!' I said, 'Yes, I did.'"

His father's vinyl collection drew him into the orbit of Charley Pride, Charlie Rich and other Nashville stars, and Bill was spell-bound. When he was "about six or seven years old," his father retired from the navy and the family moved to Pennsylvania.

"I got laughed at for listening to country music," he admits. "I was a kid in the hippie days of the '70s. Everybody was into rock 'n' roll and I loved country music. I remember being called a redneck. Then when I turned 15, I got saved in this little church and these two people in the church gave me a guitar, and I just started writing songs about whatever—spiritual things, all kinds of things."

That guitar may have sparked a beginning, but Bill was married and a father, making a good living as a tool-and-die man in Pennsylvania, when a couple of things converged that paved the way to Nashville. First, a tape of his songs, thanks to some

well-connected friends, found its way into the hands of Pat Halverson of Sound Seventy Music. "She worked with Charlie Daniels and all those guys. I sent her a four-song tape and she called after a few days and was real excited about the music. And then, after that, a friend of mine who'd moved here—John Trevethen—said, 'Why don't you come on down here?'"

"So my wife and I decided to move to Nashville in 1988. My boss said that he would hold my job open for me for a few months, which was really nice." A well-intended gesture, to be sure, but Bill Luther would never turn back. He signed a publishing deal with AMR/New Haven Music, which was acquired by BMG Music Publishing in 1997.

Since he's also a fine singer (he sang the demo of "Amazed" for friends Marv Green, Chris Lindsey and Aimee Mayo), we asked Bill about his recording career. "That's been a real frustrating thing, emotionally and spiritually, 'cause there's a part of me that really loves to go out and play this music, to play those songs that nobody's gonna record. I had a record deal on DreamWorks and it was a real struggle. There was a lot of faith there from a couple of different people but at the other end of it . . . well, to put it in simple terms, I just couldn't lose enough weight! It was a heartbreaking experience, but it helped me understand artists and what they go through.

"I'm working on a record right now. Primarily I'm doing it just as a creative thing; I've got these really cool songs and I just want to record them. A lot of stuff I've written by myself. I may shop it around or let people buy it and give the money to a charity. I'll bring my friends in and make them a part of it, let 'em play instruments or sing backgrounds. Some of my songwriting friends, like Brett James, Marv Green and Hillary Lindsey, are my favorite vocalists.

"Recently I got to open up for Marcus Hummon at a songwriter thing he did at the Ryman [*A Songwriter's Story . . . An Evening with Marcus Hummon and Friends*]. I thought me and David Lee were both gonna start crying! There's something magical about music. I'm so grateful every day that I've been allowed to do this, and for the great people that I've met in this town." ■

Adding Pictures To Music: CHANDRA LAPLUME

by: Robert L. Daerschuk



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This is my brothel," laughs Chandra LaPlume. At least that's what co-workers call her office, on the second floor of Taillight Television's Music Row headquarters. The reasons are visual: The light here is sunset red, filtered through the tinted shades on her lamps and the crimson curtains over her windows. The furnishings, too, are exotic, particularly the two cushioned round chairs, into which visitors sink to a level that requires LaPlume to lean forward and rise slightly

behind her desk to maintain eye contact.

So what if it's not practical? It looks cool. And, given that LaPlume is a major player in the world of country music videos, appearance is not to be taken lightly.

"...and this is where I 'pimp out' my directors," she continues, stretching the metaphor. "I'm basically their agent: I go out and find them work. An in-house producer puts together the crew and runs the budget. I'll go to the set and maintain the relationship between the artist, my director, and the record company."

This routine has helped launch some of the most visible videos of recent vintage by Dierks Bentley, Craig Morgan, Patty Loveless, Reba McEntire, Blake Shelton, and other headliners. Yet the details vary, depending whether the artist is established or just breaking into the business, the director's take on the song, and of course, the budget—which is typically bigger now than it was a few years ago.

Bigger, that is, per project: "They average from \$75,000 to \$100,000 each, because record companies are doing fewer of them," LaPlume explains. "I still get calls, though, where people say, 'We've got a little over \$40,000 to do a video.' So I'll give the music to the director and say, 'If you can come up with something, let me know.'"

That's exactly what happened when Taillight did Merle Haggard's recent "America's First" video. "We didn't have to do a lot because Merle is such an icon," she says. "At the same time, it's a story-oriented song, so we couldn't just put him on a stage and shoot. We had to have more 'B-roll,' just pieces of Americana, which we shot without him being there—and we brought it all in on budget."

The point is that unlike recording technology, which has become affordable to practically anyone who wants to cut an album, there are fixed costs that keep video shoots beyond the budget of most struggling artists. Even so, LaPlume insists, videos have become indispensable, especially with new online channels opening up to performers who can't yet break into the rotation on CMT or GAC.

"That's how Warner Bros. launched Shannon Brown, with an AOL music channel show on the making of her record," she points out. "People are sending videos now via email blasts. And CMT may not add your video on air but they will put it on their webpage, which is where the young consumer who is looking for new music will probably find it anyway. So one way or another, even if you're an independent artist, you can never go wrong when you add pictures to your music." ■

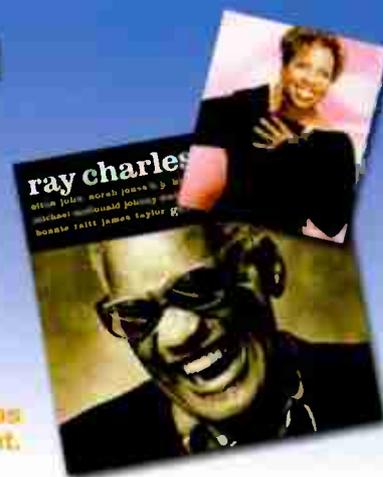
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1

COUNTRY IN THE ROCKIES

Artists and industry came together in Crested Butte, Colorado Jan. 28-Feb. 1 to support the T.J. Martell Foundation and the Frances Williams Preston Labs of Vanderbilt-Ingram Cancer Center in Nashville at the annual CITR fundraiser. *Photos: Alan Mayor*



6



2

1. Blue County 2. Steve Cropper 3. Jeff Hanna, Matraca Berg, Jessi Alexander and Jon Randall. 4. Gary and Jennifer Chapman, Mike Kraski, Tim Wipperman, Little Big Town's Kimberly Roads, BMI's Paul Corbin, Clint Black, LBT's Phillip Sweet, Frances Preston, LBT's Karen Fairchild and Jimi Westbrook 5. John Corbett 6. Clint Black



5



3



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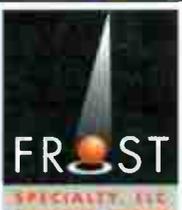
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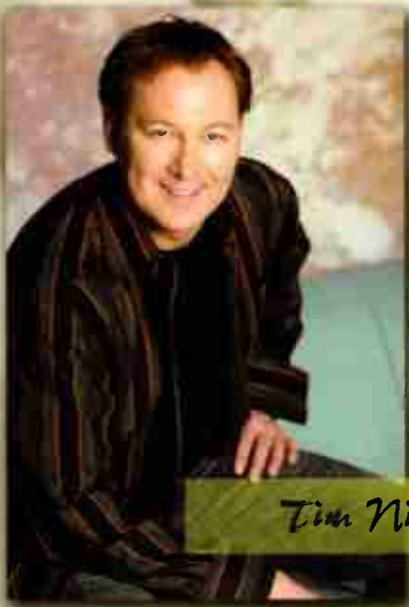
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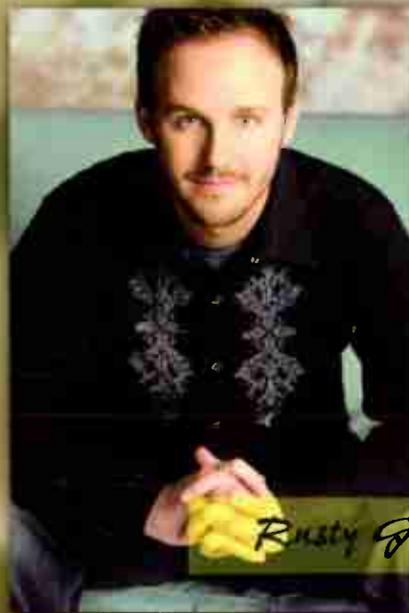
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