

Monthly Market Analysis

September 2009

ISSUE NO 331
(Weeks 35 – 39)

Market Summary September

• Sales down but big releases to come

Album sales were down again in September (by 6.3%) and also for the third quarter (by 5.1%) but there are some reasons for optimism, with another strong Q4 release schedule.

New titles due in October include debut albums from Alexandra Burke and Cheryl Cole, while Whitney Houston returns with a new studio album. November sees a raft of strong releases, with both the return of Robbie Williams and perhaps the most anticipated release this Christmas, Susan Boyle's debut. Leona Lewis will follow up her phenomenally successful debut *Spirit* and the first 'best of' by Foo Fighters will also be among the most in-demand this Christmas.

• Singles sales still relatively strong

Although the rate of increase in the singles market has slowed somewhat - in September sales were up by 25%, compared with over 40% in May - demand is still strong and Top 10 titles are regularly selling over 100,000 copies a month. On a year-to-date basis the market is still up by over a third - 35.4%.

• Music Video market records fall

Music Video sales fell for the first time in three months as demand for Michael Jackson titles finally dipped.

In This Report

This report for BPI members contains all of the usual data series as well as:

- an introduction to music 'apps'
- a company profile on Plastic Head
- 2009 Mercury Prize sales analysis

Best Selling Album



Muse - *The Resistance*

Muse's fifth studio album sold over 200,000 copies across the last two weeks of the month

Best Selling Single



David Guetta ft Akon - *Sexy Chick*

Sexy Chick is David Guetta's second Number One in a row and sold almost a quarter of a million copies in September

Airplay Hit



Pixie Lott - *Boys and Girls*

Pixie Lott has now had two airplay Number Ones with her first two singles - *Mama Do* was top of the chart in June

Key Indicators September

↓	All Albums	-6.3%
↓	Artist Albums	-2.8%
↓	Compilations	-23.8%
↑	Singles	+24.9%
↓	Total Video	-5.3%
↓	Music Video	-13.0%

Digital's share:

Singles: 98.7%

Albums: 15.1%

Key Indicators Year To Date

↓	All Albums	-6.6%
↓	Artist Albums	-4.3%
↓	Compilations	-18.4%
↑	Singles	+35.4%
↓	Total Video	-7.1%
↓	Music Video	-4.1%

Digital's share:

Singles: 98.6%

Albums: 14.1%

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Albums Market Overview

Monthly Album Sales

Sales fail to break 10m in September

September was the second five-week month - after June - of 2009 to record total sales of less than 10m. In every five-week period (March, June, September and December) of 2008 sales exceeded that tally.

As a result, sales were down for the second month in a row and the year-to-date loss now stands at 6.6%, equivalent to just over 5m sales.

Sales Levels - No. of Titles

	Sept 08	Sept 09
200,000+	2	1
100,000-199,999	5	2
50,000-99,999	9	17

As the table above shows, there were fewer 'top sellers' this September than in 2008, when two titles (Kings Of Leon's *Only By The Night* and the *Mamma Mia*



OST) sold more than 200,000 copies. This September only one (Muse's *Resistance*) managed that level of sales. Likewise, only two titles this month were in the

100-200k sales bracket, compared with five (Metallica, The Verve, Rihanna, Duffy and The Script) a year ago.

Almost twice as many titles sold in the 50k-100k bracket, however. In fact the albums in positions 17 to 20 in the September chart this year all sold more than in the Top 20 from a year earlier.

Sales by Format

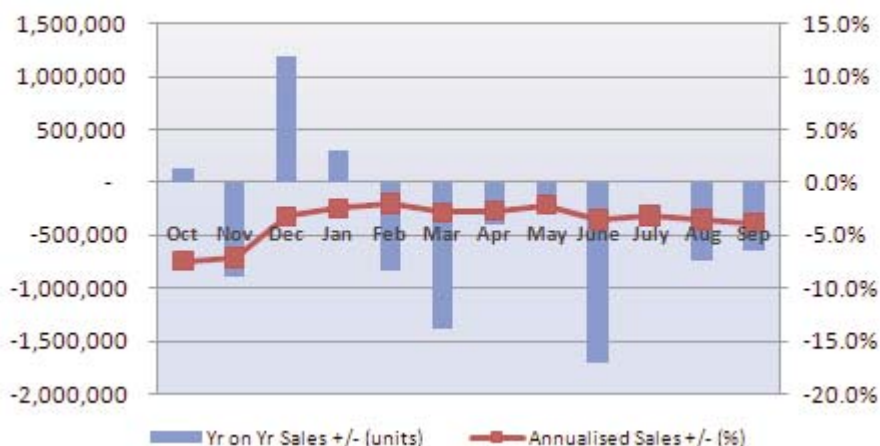
Again the major losses were on the CD format, where sales were down by 12% for the month. Digital's rate of growth has slipped slightly since the beginning of the year and in three of the last four months has dipped below 50%.

Vinyl sales have, however, remained steady and are up by 10% for the year to date.

September's biggest seller was the third album by Arctic Monkeys, *Humbug*, which sold a healthy 2,632 copies. This placed it at Number Two in the year-to-date chart behind Bon Iver's *For Emma*.



Year on Year Changes in Album Sales 2008 - 2009



Album Sales by Format (m)

MONTH	CD	LP	Digital*	Other	Total
September 2005	12.761	0.030	-	0.011	12.802
September 2006	12.016	0.024	0.370	0.009	12.419
September 2007	9.944	0.017	0.597	0.009	10.567
September 2008	9.274	0.019	0.989	0.009	10.291
September 2009	8.158	0.019	1.455	0.013	9.645
% change 08/09	-12.0%	-0.8%	+47.1%	+46.6%	-6.3%

YEAR TO DATE

Jan - Sept 2005	99.638	0.273	-	0.161	100.072
Jan - Sept 2006	95.555	0.188	1.663	0.105	97.510
Jan - Sept 2007	84.046	0.150	4.374	0.107	88.677
Jan - Sept 2008	76.486	0.146	7.106	0.093	83.830
Jan - Sept 2009	67.005	0.160	11.071	0.077	78.313
% change 08/09	-12.4%	+10.1%	+55.8%	-17.3%	-6.6%

MOVING ANNUAL TOTAL

12m end Sept 05	162.086	0.395	-	0.562	163.043
12m end Sept 06	154.228	0.266	1.663	0.271	156.427
12m end Sept 07	139.906	0.213	5.511	0.279	145.909
12m end Sept 08	123.856	0.201	8.981	0.179	133.218
12m end Sept 09	113.492	0.223	14.274	0.138	128.127
% change 08/09	-8.4%	+10.9%	+58.9%	-23.3%	-3.8%

* Digital album sales data only available from April 2006 onwards

Top 5 Vinyl Albums - September 2009

Pos	Title	Artist	Company	Sales
1	Humbug	Arctic Monkeys	Domino	2,632
2	For Emma, Forever Ago	Bon Iver	4AD	234
3	Backspacer	Pearl Jam	Universal Island	224
4	The Stone Roses	The Stone Roses	Columbia Label Group	216
5	XX	XX	XL Recordings	193

Albums - Charts

Top 20 Albums September 2009

TM	LM	Title	Artist	Company	Digital %	Sales
1	new	The Resistance	Muse	Warner Bros	16.2%	201,394
2	new	Humbug	Arctic Monkeys	Domino Recordings	16.5%	169,972
3	new	We'll Meet Again - The Very Best Of	Vera Lynn	Decca	0.6%	151,135
4	new	One Love	David Guetta	Virgin	21.8%	98,975
5	1	Now That's What I Call Music 73	Various Artists	EMI TV/UMTV	3.0%	94,780
6	2	Big Tunes - Back 2 The 90s	Various Artists	Ministry Of Sound	1.1%	91,059
7	new	Revelation	Peter Andre	Conehead	7.3%	87,678
8	16	Only By The Night	Kings Of Leon	Columbia Label Group	14.4%	85,388
9	new	Celebration	Madonna	Warner Bros	6.9%	77,237
10	5	Lungs	Florence & The Machine	Universal Island	23.4%	67,471
11	new	The Blueprint 3	Jay-Z	Atlantic Records UK	24.8%	67,095
12	4	The End	Black Eyed Peas	Polydor	14.1%	65,010
13	new	R&B Love Collection 2009	Various Artists	UMTV	3.6%	62,753
14	6	Sunny Side Up	Paolo Nutini	Atlantic Records UK	7.9%	59,493
15	15	Ready For The Weekend	Calvin Harris	Columbia Label Group	16.5%	57,274
16	3	The Essential	Michael Jackson	RCA Label Group	5.0%	56,180
17	27	Songs For You Truths For Me	James Morrison	Polydor	3.3%	55,048
18	10	West Ryder Pauper Lunatic Asylum	Kasabian	Columbia Label Group	13.2%	54,290
19	new	Tongue n' Cheek	Dizzee Rascal	Dirtee Stank	19.3%	53,113
20	7	I Am Sasha Fierce	Beyonce	RCA Label Group	13.0%	51,848

Source: OCC

Top 10 Albums Year To Date

TM	LM	Title	Artist	Company	Digital %	Sales
1	1	Only By The Night	Kings Of Leon	Columbia Label Group	13.2%	864,377
2	2	The Fame	Lady Gaga	Polydor	13.3%	745,819
3	4	Now That's What I Call Music 73	Various Artists	EMI TV/UMTV	2.7%	661,535
4	3	Now That's What I Call Music 72	Various Artists	EMI TV/UMTV	2.2%	648,870
5	5	It's Not Me It's You	Lily Allen	Parlophone	19.7%	609,092
6	6	I Am Sasha Fierce	Beyonce	RCA Label Group	11.6%	528,408
7	7	The Essential	Michael Jackson	RCA Label Group	5.2%	525,882
8	8	Invaders Must Die	Prodigy	Cooking Vinyl	17.7%	486,643
9	9	The Circus	Take That	Polydor	9.3%	451,863
10	10	Songs For You Truths For Me	James Morrison	Polydor	8.6%	415,428

Source: OCC

Album Charts

Muse Top September Chart

The fifth studio album by Muse, *The Resistance*, sold an impressive 148,161 copies in its week of release, making it the fifth quickest selling album of the year to date. The Top Two fastest sellers of 2009 are *Now 72* and *Now 73*, with Eminem's *Relapse* and U2's *No Line On The Horizon* the only artist titles of 2009 to outsell *The Resistance* in their first week.

Muse ended up topping the monthly chart based on two weeks' worth of sales, which took *The Resistance's* sales tally above 200,000.

The next three places in the chart were also taken by new entries, with Arctic Monkeys' *Humbug* and a new Vera Lynn compilation both exceeding the 150,000 sales mark.



French DJ David Guetta's *One Love* album occupies the number four spot

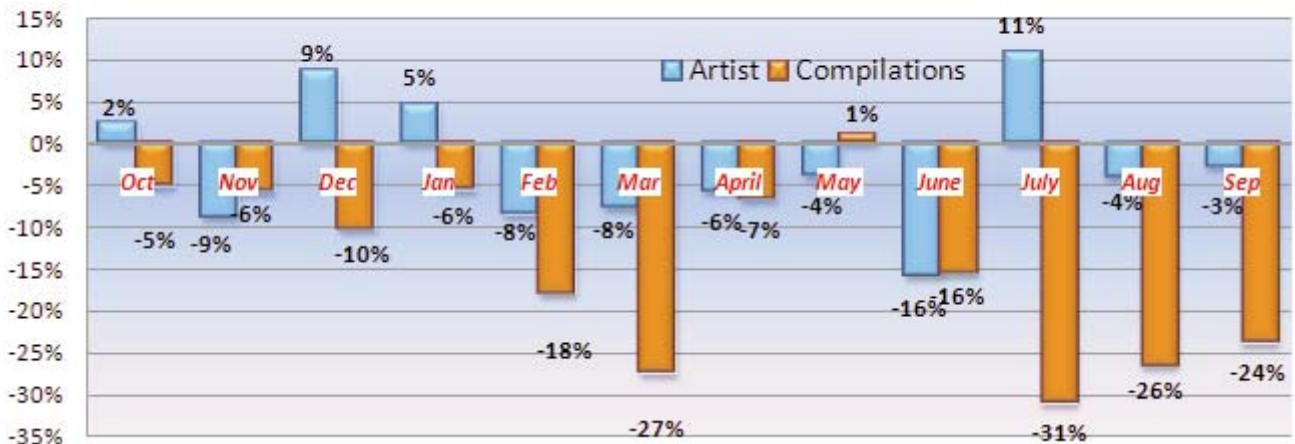
and follows the release of two Number One singles, *When Love Takes Over* and *Sexy Chick*.

Peter Andre's *Revelation* entered at Number Three in week 38 and became his highest charting album since his debut, *Natural*, in 1993. There were also new entries in the monthly Top 20 for Madonna (a 2-disc compilation), Jay-Z (his 11th album, and his first to break the weekly Top 10) and Dizzee Rascal, whose *Tongue n' Cheek* became his first ever Top Three album.



Compilation / Artist Albums

Compilation / Artist Albums - Year on Year % Change



Compilation Albums

Comps share lowest for three years

Compilations accounted for only 17.7% of all album sales in September - the lowest share since October 2006. Sales were down by 23.8% and failed to reach 2m copies in total - the first September in recent memory where this was the case.

Best Sellers

The relatively quiet release schedule meant that only one new various artists title made the overall Top 20 for the month - *R&B Love Collection 2009*, which sold 62,753 copies and charted at Number 13. The biggest selling title of the month remained *Now 73*, which was the overall Number One in August.



The success of the *Mamma Mia* OST in 2008 continues to skew comparisons slightly. In September last year it sold over 200,000 copies. If that one title is removed from the equation then that month's Top 10 would have sold a cumulative 461,872 copies, compared with 433,402 copies in September 2009. This would result in a decrease of only 6% across the top titles.

Weekly Sales

The market has run at a comparative loss for most weeks of 2009, however - sales have only been greater in five weeks this year. The biggest positive difference was in week 15, when *Now 72* was released.

Compilation / Artist Album Sales (m)

MONTH	Compilations	Artist	Total*	Comps %
September 2005	2.401	10.401	12.802	18.8%
September 2006	2.119	10.223	12.342	17.2%
September 2007	2.145	8.265	10.410	20.6%
September 2008	2.165	7.901	10.066	21.5%
September 2009	1.650	7.682	9.331	17.7%
Change 08/09	-23.8%	-2.8%	-7.3%	

YEAR TO DATE

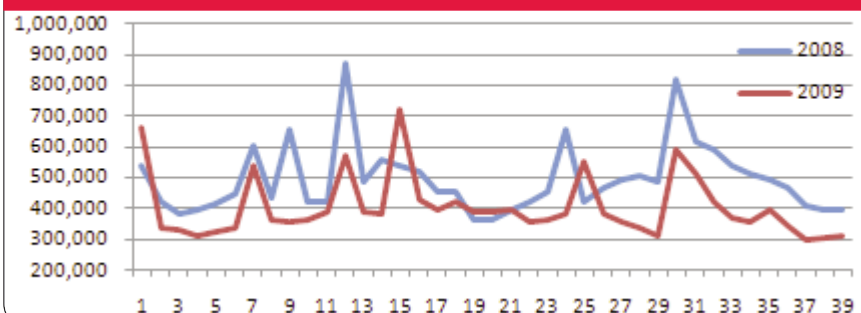
Jan - Sept 2005	21.073	78.999	100.072	21.1%
Jan - Sept 2006	18.510	78.636	97.147	19.1%
Jan - Sept 2007	18.718	68.812	87.531	21.4%
Jan - Sept 2008	19.305	62.872	82.177	23.5%
Jan - Sept 2009	15.754	60.182	75.936	20.7%
Change 08/09	-18.4%	-4.3%	-7.6%	

MOVING ANNUAL TOTAL

12m end Sept 05	35.637	127.406	163.043	21.9%
12m end Sept 06	30.216	125.848	156.064	19.4%
12m end Sept 07	30.614	113.869	144.484	21.2%
12m end Sept 08	31.040	100.093	131.133	23.7%
12m end Sept 09	26.490	98.600	125.091	21.2%
Change 08/09	-14.7%	-1.5%	-4.6%	

* Note that totals do not match with those on page 3 due to a small number of unidentified digital albums which cannot be attributed to either artist or compilation albums

Weekly Compilation Sales Comparisons 2008 - 2009



Singles Market Overview

Monthly Singles Sales

Downloads pass 100m mark

Over 100m downloads have now been sold in 2009 - the addition of another 13m in September brought the year-to-date total up to 108m. This level wasn't reached until the second week of December in 2008.

Sales were up by 24.9% in September, but this was the lowest percentage increase of the year so far. This equated to an extra 2.6m units and, as the table below shows, the number of 'top sellers' has increased year on year, with two selling over 200k as opposed to none a year earlier. There were also more titles in September 2009 at the next sales levels.

Sales Levels - No. of Titles

	Sept 08	Sept 09
200,000+	-	2
100,000-199,999	5	6
50,000-99,999	7	16

Best Sellers

As mentioned above, two singles sold over 200,000 copies in September. David



Guetta's *Sexy Chick* spent the entire month in the Top Three and sold almost a quarter of a million copies in the process, while Dizzee Rascal's

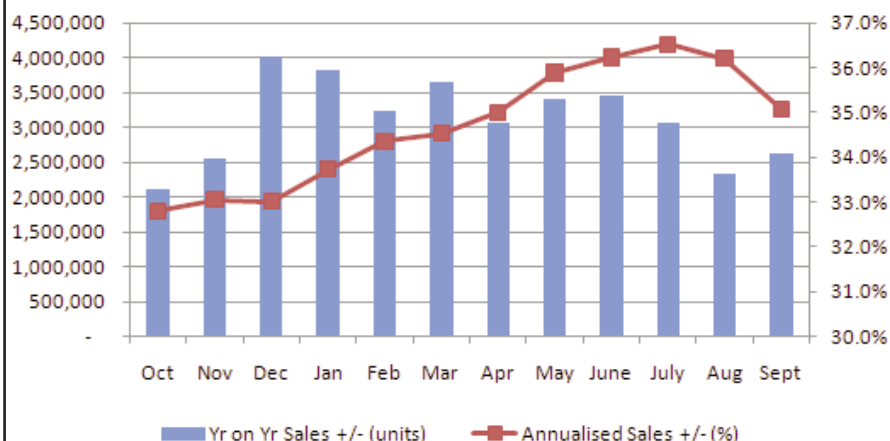
Holiday made it a run of three Number One singles in a row, reaching the top spot in week 35. His *Tongue n' Cheek* album was released in the last week of the month.

Catalogue Sales

Although definitions of what constitutes a catalogue track or album vary (in this case we've classified it as anything released before 2008), it continues to constitute a significant share of sales.

In September's singles chart 32 of the Top 200 titles were catalogue releases, accounting for almost a quarter of a million sales. Five were placed within the Top 100, with The Veronicas' *Untouched* (first released in 2007) the highest charting of those. Michael Jackson's *Man In The Mirror* continues to be the singer's biggest selling track since his death, while Luther Vandross's *Dance With My Father* has enjoyed a renaissance due to its use in ITV's X-Factor.

Year on Year Changes in Singles Sales 2008 - 2009



Singles Sales by Format (m)

MONTH	7"	12"	CD	Digital	Other	Total
September 2005	0.125	0.172	1.540	2.890	0.048	4.776
September 2006	0.108	0.120	1.018	5.290	0.010	6.546
September 2007	0.117	0.080	0.590	6.927	0.003	7.717
September 2008	0.036	0.016	0.244	10.226	0.007	10.530
September 2009	0.024	0.012	0.131	12.981	-	13.148
% change 08/09	-32.5%	-27.4%	-46.5%	+26.9%	-90.4%	24.9%

YEAR TO DATE

YEAR TO DATE	7"	12"	CD	Digital	Other	Total
Jan - Sept 2005	0.803	1.638	12.802	16.944	0.607	32.795
Jan - Sept 2006	0.783	0.950	8.301	37.607	0.168	47.809
Jan - Sept 2007	0.852	0.641	4.356	54.955	0.125	60.929
Jan - Sept 2008	0.396	0.217	2.452	77.738	0.018	80.822
Jan - Sept 2009	0.181	0.089	1.215	107.945	0.033	109.463
% change 08/09	-54.3%	-59.1%	-50.4%	+38.9%	+83.5%	35.4%

MOVING ANNUAL TOTAL

MOVING ANNUAL TOTAL	7"	12"	CD	Digital	Other	Total
12m end Sept 05	0.997	2.385	18.975	20.032	0.801	43.191
12m end Sept 06	1.053	1.388	13.021	47.107	0.327	62.896
12m end Sept 07	1.116	0.943	7.367	70.447	0.173	80.045
12m end Sept 08	0.584	0.379	4.729	100.739	0.023	106.454
12m end Sept 09	0.271	0.125	2.838	140.482	0.065	143.781
% change 08/09	-53.6%	-66.9%	-40.0%	+39.5%	+185.1%	+35.1%

Catalogue Best Sellers - September

Pos	Title	Artist	Company	Sales	
1	65	Untouched	The Veronicas	Warner Bros	16,981
2	70	Man In The Mirror	Michael Jackson	RCA Label Group	15,008
3	73	Dance With My Father	Luther Vandross	RCA Label Group	14,908
4	79	Don't Stop Believin'	Journey	Columbia Label Group	13,914
5	96	Take Me Away	4 Strings	Virgin	11,348

Singles - Charts

Top 20 Singles September 2009

TM	LM	Title	Artist	Company	Digital %	Sales
1	13	Sexy Chick	David Guetta ft Akon	EMI Records	100.0%	246,891
2	new	Holiday	Dizzee Rascal	Dirtee Stank	97.6%	206,731
3	1	I Gotta Feeling	Black Eyed Peas	Polydor	96.6%	179,238
4	new	Run This Town	Jay-Z ft Rihanna & Kanye West	Atlantic Records UK	100.0%	172,458
5	new	Get Sexy	Sugababes	Universal Island	95.0%	119,056
6	new	Break Your Heart	Taio Cruz	Universal Island	97.3%	114,405
7	new	Boys & Girls	Pixie Lott	Mercury	96.6%	111,634
8	11	Remedy	Little Boots	Atlantic Records UK	98.2%	100,731
9	2	Never Leave You	Tinchy Stryder ft Amelle	Universal Island	97.4%	88,833
10	5	Sweet Dreams	Beyonce	RCA Label Group	96.1%	84,446
11	35	Outta Here	Esmee Denters	Polydor	98.8%	74,542
12	10	Ready For The Weekend	Calvin Harris	Columbia Label Group	97.2%	74,113
13	55	Sex On Fire	Kings Of Leon	Columbia Label Group	99.8%	73,844
14	new	She Wolf	Shakira	RCA Label Group	96.7%	72,899
15	232	Left My Heart In Tokyo	Mini Viva	Polydor	97.2%	72,171
16	16	Fire Burning	Sean Kingston	RCA Label Group	97.5%	69,592
17	new	We Are Golden	Mika	Universal Island	94.6%	69,003
18	3	Supernova	Mr Hudson ft Kanye West	Mercury	100.0%	66,495
19	new	Celebration	Madonna	Warner Bros	81.8%	63,393
20	14	Get Shaky	Ian Carey Project	UMTV	97.0%	61,854

Source: OCC

Top 10 Singles Year To Date

TM	LM	Title	Artist	Company	Digital %	Sales
1	1	Poker Face	Lady Gaga	Interscope	97.9%	815,366
2	2	Just Dance	Lady Gaga	Interscope	97.5%	729,067
3	3	In For The Kill	La Roux	Polydor	98.8%	624,218
4	4	Boom Boom Pow	Black Eyed Peas	Interscope	97.2%	558,374
5	14	I Gotta Feeling	Black Eyed Peas	Interscope	97.9%	554,712
6	5	Number 1	Tinchy Stryder ft N-Dubz	4th & Broadway	96.6%	503,185
7	6	The Fear	Lily Allen	Regal Recordings	97.8%	467,695
8	9	Bonkers	Dizzee Rascal/Van Helden	Dirtee Stank	96.7%	440,550
9	10	Use Somebody	Kings Of Leon	Hand Me Down	99.2%	438,449
10	7	Broken Strings	James Morrison/Nelly Furtado	Polydor	98.8%	429,110

Source: OCC

Best Sellers

Urban Tracks Dominate Top Sellers

Contemporary Urban tracks once again placed well among the top sellers in September, with six of the Top 10 classified as such. One of those tracks - Black Eyed Peas' *I Gotta Feeling* - has now entered the year-to-date Top 10 (at number 4), although the top three best sellers (by Lady Gaga and La Roux) are all classified as Pop.

There were eight new entries in the monthly chart. Madonna's *Celebration* is a new track recorded for a retrospective compilation of the same name, while



Mika's *We Are Golden* was the first track to be released from his second album, *The Boy Who Knew Too Much*, released in the last week of September.

Shakira's *She Wolf* is the title track from her imminent album of the same name, her third English-language release - it entered the chart at number 25 in week 37 and spent the rest of the month in the Top Five.

Pixie Lott's *Boys and Girls* is the second single to be taken from her *Turn It Up* debut album, and was the seventh biggest selling single of the month. Jay-Z, Sugababes and Taio Cruz occupied places four to seven, all with first singles from new albums.

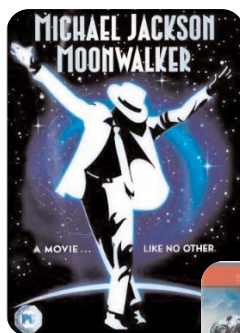
Music Video Market Overview

Music Video

Sales drop by 13% despite ongoing demand for Jackson titles

After two consecutive months of positive growth fuelled by consumer demand for Michael Jackson titles, the music video market recorded a 13% decline in sales in September. Despite Jackson's catalogue continuing to take an impressive share of sales in September, the market recorded its seventh double digit percentage decline in the past 12 months.

Consequently, year-to-date sales recorded a 4.1% loss after the deficit was reduced to less than 3% in August.



Over the course of the past three months, Michael Jackson's video sales have totalled 378,000, almost 41% of the market total.

Moonwalker was the monthly best seller for the third consecutive month and has now sold 209,731 copies this year, which represents two thirds of its total since it was originally released in 2005.

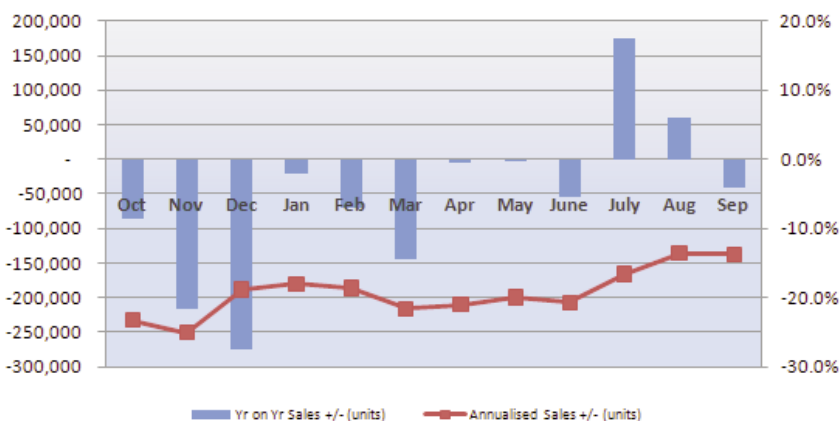


The wider video market

Total video sales have fallen for each of the past nine months and sales so far this year have totalled 156.2m units, 11.6m fewer than at the same time last year, a drop of 7.1%. Music's share has consequently increased marginally, but the market is still dominated by Film titles as shown in the graph to the right. *Angels & Demons* was the biggest selling film title in September with sales of almost 663,000 copies.

Top sellers in other categories included *Madagascar - Escape 2 Africa* (Children's 86,935), *Inbetweeners Series 1&2* (TV Video 33,385), *Frankie Boyle Live* (Other 14,631) and *WWE Best of Smackdown* (Sport 4,663).

Year on Year Changes in Music Video Sales 2008 - 2009



Video Sales (m)

MONTH	All Video	Music Video	Music Video %
September 2005	16.227	0.409	2.5%
September 2006	17.523	0.499	2.8%
September 2007	19.487	0.358	1.8%
September 2008	20.930	0.317	1.5%
September 2009	19.816	0.276	1.4%
% change 08/09	-5.3%	-13.0%	

YEAR TO DATE

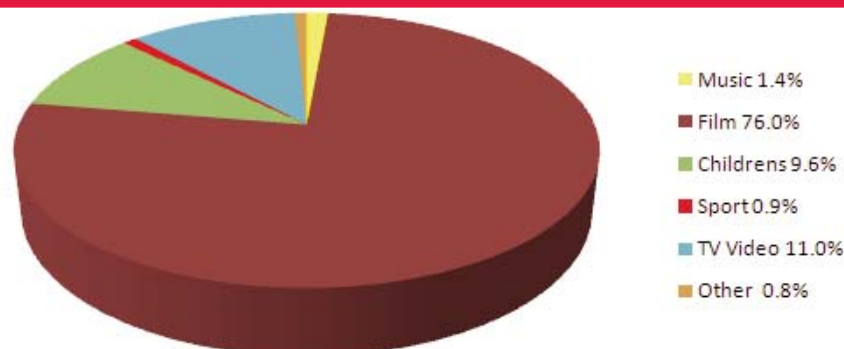
Jan - Sept 2005	139.079	3.709	2.7%
Jan - Sept 2006	140.815	4.301	3.1%
Jan - Sept 2007	156.878	2.910	1.9%
Jan - Sept 2008	164.234	2.478	1.5%
Jan - Sept 2009	152.579	2.377	1.6%
% change 08/09	-7.1%	-4.1%	

MOVING ANNUAL TOTAL

12m end Sept 2005	228.458	6.969	3.1%
12m end Sept 2006	223.841	7.937	3.5%
12m end Sept 2007	245.035	6.453	2.6%
12m end Sept 2008	257.044	4.942	1.9%
12m end Sept 2009	246.237	4.263	1.7%
% change 08/09	-4.2%	-13.7%	

Source: OCC

Total Video Sales by Genre - September 2009



Music Video - Charts

Top 20 Music Videos September 2009

TM	LM	Title	Artist	Company	Blu-Ray%	Sales
1	1	Moonwalker	Michael Jackson	Warner Home Video	-	41,880
2	new	The 3D Concert Experience	Jonas Brothers	Walt Disney Studios	-	10,490
3	6	The Story Of	Anvil	Universal Pictures	1.0%	8,929
4	4	High School Musical - The Concert	Cast Recording	Walt Disney Studios	-	8,304
5	3	Number Ones	Michael Jackson	Rca Label Group	-	4,970
6	2	Live In Bucharest - The Dangerous Tour	Michael Jackson	Rca Label Group	-	4,595
7	5	History 1 & 2	Michael Jackson	Rca Label Group	-	3,693
8	12	Dream Cast - Les Miserables In Concert	Cast Recording	2entertain	-	2,148
9	7	Live In London	Leonard Cohen	Columbia Label Group	-	1,936
10	new	Gimme Shelter	Rolling Stones	Warner Home Video	-	1,827
11	8	Judy Frank & Dean	Garland/Sinatra/Martin	Boulevard Ent	-	1,674
12	new	Chess - In Concert	Cast Recording	Warner Music Ent	-	1,651
13	13	Flight 666 - The Film	Iron Maiden	EMI Records	12.9%	1,353
14	9	The Trial & Triumph Of The King Of Pop	Michael Jackson	Wienerworld	-	1,134
15	30	Shine A Light	Rolling Stones	20th Century Fox	20.6%	1,083
16	22	History - The King Of Pop 1958-2009	Michael Jackson	Odeon Entertainment	-	1,071
17	26	Beautiful World Live	Take That	Polydor	11.5%	1,047
18	14	Woodstock	Various Artists	Warner Home Video	25.0%	1,033
19	new	All Or Nothing 1965-1968	Small Faces	ITV Dvd	-	1,009
20	11	Unmasked	Michael Jackson	IMC Vision	-	997

Source: OCC

Top 10 Music Videos Year to Date

TM	LM	Title	Artist	Company	Blu-Ray%	Sales
1	1	Moonwalker	Michael Jackson	Warner Home Video	-	209,731
2	2	Live In Bucharest - The Dangerous Tour	Michael Jackson	RCA Label Group	-	56,878
3	3	Number Ones	Michael Jackson	RCA Label Group	-	49,794
4	4	High School Musical - The Concert	Cast Recording	Walt Disney Studios	-	46,414
5	5	History 1 & 2	Michael Jackson	RCA Label Group	-	36,366
6	9	The Story Of	Anvil	Universal Pictures	2.8%	30,208
7	6	Flight 666 - The Film	Iron Maiden	EMI Records	13.2%	29,285
8	7	Live In London	Leonard Cohen	Columbia Label Group	-	29,114
9	8	Dream Cast - Les Miserables In Concert	Cast Recording	2entertain	-	24,205
10	10	Shine A Light	Rolling Stones	20th Century Fox	12.8%	20,522

Source: OCC

Monthly Best Sellers

Jackson titles account for top 3

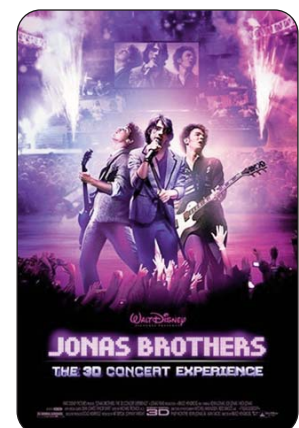
Moonwalker continued to head the list of best selling music videos of the year so far, outselling its nearest rival by almost four copies to one.

There were no new entries on the year to date chart with only small movements within the Top 10. *The Story of Anvil* made the biggest jump, by moving up three places to number nine.

At the three quarter stage of the year, six titles have passed the 30,000 sales threshold, which is one more than at this

time last year. In fact the entire Top 10 have outsold their 2008 counterparts which indicates that the market decline is being driven by sales losses of smaller selling titles.

In the monthly chart there were four new entries in the Top 20 (compared to no fewer than 11 in September 2008). These included The Jonas Brothers' *3D Concert Experience* release, which sold more than 10,000 copies in September. The DVD is a collection of favourite tracks performed on the Burnin' Up tour and is similar in concept to the Hannah Montana *Best Of Both Worlds Concert* which was also a 3D release.



Retail Trends

Retail Developments

● HMV posts sales rise/strikes digital deal

HMV reported a 1.7% rise in like-for-like sales at its UK and Ireland stores in the 18 weeks to August 29th. The chain's total sales - including sales from some former Zavvi stores - rose to 12.5%. At group level total sales improved by 4.4% although like-for-like decreased by 1.8%.

At the same time HMV also announced that it was acquiring a 50% stake in 7Digital, for £7.7m. Under the agreement the company will become the group's supplier for all its existing digital operations under the HMV and Waterstone's brands.

The chain also plans to open between 10 and 15 temporary stores for Christmas in areas lacking an entertainment retail presence, hiring 2,000 extra staff for the period.

● Vodafone signs Warner deal

Vodafone announced in late September that it had agreed with Warner Music to sell DRM-free catalogue - this meant that it now has deals with all four majors in place.

● Datz Music Lounge closes

The unlimited-download MP3 service Datz closed in the middle of September after just under a year in business. Although the service signed deals with EMI and Warner and many key indies it was never able to offer catalogue from Universal and Sony.

● Apple store is capital's most profitable

Apple's flagship Regent Street store is the most profitable per square foot in London, according to Verdict Research. It registers takings of £60m a year - equivalent to £2,000 per square foot.

Sales By Retailer Type

The Independent retailers recorded an increase for the second month running in September, with total sales rising by 5.3%.

The Supermarkets continue to account for just under a third of the albums market and over two thirds of sales of titles such as *Now 73* and *R&B Love Collection 2009* took place within this sector. Digital - now regularly accounting for 15% of the market - took substantial shares of albums such as Jamie T's *Kings & Queens* and The Temper Trap's *Conditions*; four in ten of the latter's sales were on download.

Albums - Sales by Type of Retailer

VOLUME (m)

MONTH	Specialists & Multiples	Super-markets	Indies	Digital
September 2005	8.347	3.859	0.595	-
September 2006	8.077	3.518	0.454	0.370
September 2007	6.635	3.009	0.327	0.597
September 2008	6.283	2.763	0.257	0.989
September 2009	5.006	2.914	0.270	1.455
% change 08/09	-20.3%	+5.5%	+5.3%	+47.1%

YEAR TO DATE

Jan - Sept 05	64.703	30.434	4.935	-
Jan - Sept 06	63.184	28.703	3.961	1.663
Jan - Sept 07	55.955	25.299	3.049	4.374
Jan - Sept 08	51.581	23.114	2.030	7.106
Jan - Sept 09	42.290	22.968	1.984	11.071
% change 08/09	-18.0%	-0.6%	-2.2%	+55.8%

MOVING ANNUAL TOTAL

12m end Sept 05	107.902	47.593	7.548	-
12m end Sept 06	102.090	46.575	6.099	1.663
12m end Sept 07	94.510	41.194	4.696	5.511
12m end Sept 08	83.927	37.067	3.244	8.981
12m end Sept 09	73.278	37.666	2.908	14.274
% change 08/09	-12.7%	+1.6%	-10.4%	+58.9%

MARKET SHARE - MONTH

September 2005	65.2%	30.1%	4.6%	-
September 2006	65.0%	28.3%	3.7%	3.0%
September 2007	62.8%	28.5%	3.1%	5.7%
September 2008	61.1%	26.8%	2.5%	9.6%
September 2009	51.9%	30.2%	2.8%	15.1%

MARKET SHARE - YEAR TO DATE

Jan - Sept 05	64.7%	30.4%	4.9%	-
Jan - Sept 06	64.8%	29.4%	4.1%	1.7%
Jan - Sept 07	63.1%	28.5%	3.4%	4.9%
Jan - Sept 08	61.5%	27.6%	2.4%	8.5%
Jan - Sept 09	54.0%	29.3%	2.5%	14.1%

MARKET SHARE - MOVING ANNUAL TOTAL

12m end Sept 05	66.2%	29.2%	4.6%	-
12m end Sept 06	65.3%	29.8%	3.9%	1.1%
12m end Sept 07	64.8%	28.2%	3.2%	3.8%
12m end Sept 08	63.0%	27.8%	2.4%	6.7%
12m end Sept 09	57.2%	29.4%	2.3%	11.1%

Mobile Phone Applications - Music

The Arrival of 'Apps'



Apple's App Store on iTunes

Although still in their nascency, much has been written about the rapid growth of applications (or 'apps') for mobile phones. Although many of these are now available

across a number of handsets (in stores such as Blackberry's App World and Nokia's Ovi Store), the original - and still the most popular - platform was Apple's iPhone.



'Apps' encompass a wide variety of services and

purposes, from gaming to live departure boards for trains, and are often installable for free. Apple's store (serving iPhone and iPod Touch owners) opened in July 2008 and, by September of this year, 85,000 applications were available, with more than 2bn downloads delivered.

Global App Stats - Sept 2009

Number of Apps Downloaded	2bn
Number of Apps Available	85,000
iPhone/iTouch Owners	50m
Official App Developers	125,000

Source: Apple

One in six phone owners in the UK are now estimated to be in possession of a smartphone and, although many apps are free at the point of purchase, many offer opportunities to 'upgrade' to fuller versions or provide click-through portals to directly purchase content.

Music Apps

The music category is growing all the time, offering streaming services, artist-specific applications, games and song recognition services. This feature looks at some of the more popular and prominent; download prices quoted are from the UK iTunes store.

• Streaming/Identifying Music



Spotify

Launched in September, the Spotify app provides the same streaming service on the mobile platform that it does for PCs, although it is only currently available to Spotify's Premium customers.

Users can access music over wi-fi or 3G but if signals are too weak can listen to previously 'cached' tracks. At present the application is available on the iPhone, iPod Touch and Google's Android platforms.

COST: access is only available via Spotify's Premium service (£9.99 per month)



Shazam

Shazam's track-recognition service is available on several handsets and, along with Spotify, is one of the most popular music applications in the iPhone app store. Alongside its track tagging service, Shazam offers a click-through-to-buy option (various stores, depending on the handset): at present the company say that 8% of enquiries lead to a purchase. At one million track tags a day, this equates to a retail value of over £23m annually.

COST TO DOWNLOAD: Free



Last.fm

The streaming service is a popular iPhone app, allowing users to create personal radio stations and tag and click-through to purchase tracks from the iTunes store. The site also offers artist biogs and concert information and allows users to share tracks with friends on their iPhone contact list.

COST TO DOWNLOAD: Free



Radio

Absolute, Capital, Heart, Kiss and NME all have popular applications allowing streaming to mobile phones, with the latter also incorporating a feature enabling click-through to purchase featured tracks from iTunes.

COST: Variable

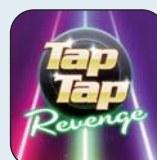
• Creating Music/Games



Ocarina

Perhaps the most ingenious of all the instrument simulators, Ocarina is operated by blowing into the phone and touching the screen to change notes. Tilting the handset manipulates vibrato rate and depth.

COST TO DOWNLOAD: £0.59



Tap Tap Revenge

Tap Tap Revenge is to the iPhone what Guitar Hero and Rock Band were to the console: an interactive play-along game with real artist recordings at the core. Many big names have had tracks feature on the original and a number of single-artist editions have since been made available around acts such as Lady Gaga, Coldplay and Dave Matthews Band.

COST TO DOWNLOAD: Original game is free; single-artist editions generally £2.99

Mobile Phone Applications - Music

The different types of music apps available are broken down across these two pages into four main categories:

• Streaming/Identifying Music

The buzz story of 2009 in the world of music has been the rise to prominence of streaming sites. Services such as Spotify and We7 are achieving very credible levels of usage and the former have already launched an app, with We7 promising their own before the end of the year.



Song identification - where the phone owner holds their handset near a speaker playing music and has the identity of the track sent to them - has also captured the public imagination, with Shazam's app one of the most popular music applications of 2009.

• Creating Music/Games

A number of apps allow the user to 'play' musical instruments and the processing power of modern smartphones is impressively demonstrated by a number of applications that enable multi-track recording: the band The 88 made a YouTube video showing how they'd used the *FourTrack* app to record a song on an iPhone, for instance.

For the more casual user, however, a burgeoning genre of apps allow smartphone owners to interact with music in novel ways, such as DJ-style 'scratching' or replicating sequencer interfaces: even Brian Eno has created one, *Bloom*. One of the most popular, and one that synthesises a 'gaming' feel with music interaction is *Tap Tap Revenge*; it will soon be joined on iPhone by one of the originators of the genre, *Rock Band*.

• Artist/Label Specific

Another burgeoning sub-genre is the 'artist-based' app where all the content (videos, blogs, photos etc) is centred around one particular act or company.

• Information/Data-based

Mobile phones give companies an ideal platform at which to connect with the public, and the range of information-based apps is building steadily. Among the most high-profile is the Official UK Charts Company's, profiled in the sidebar.



Now Music Quiz

In the same vein as the interactive music DVDs released in the same series, Now Music Quiz features 700 questions and 100 music clips, with scores based on fast responses.

COST TO DOWNLOAD: £1.79



iLike

• Artist/Label Specific

For those looking to get help building an app, social music discovery service iLike offers a 'template' service for a charge. Clients so far include artists such as Marillion, Basshunter and The Cribs, whose apps allow users to interact with each other, access videos, browse photos, find out about concerts and so on.

Labels are also using the service to keep fans abreast of their activities, with London's Hospital Records app one of the most popular on iTunes.

COST TO DOWNLOAD: Variable



I Am T-Pain

In a novel twist, T-Pain's app allows users to have their voices 'auto-tuned' when they sing into their iPhone over his backing tracks. The results can be uploaded to Facebook, MySpace or sent via email.

COST TO DOWNLOAD: £1.79



Official UK Charts

• Information/Data-based

OCC's app updates every Sunday evening with the Official singles and albums charts as well as a mobile downloads Top 40 and a list of forthcoming new releases.

It launched in February of this year and is sold in over 50 different countries, although the majority (90%) of downloads are in the UK. It offers preview and buy options (from iTunes) for each track and has remarkably high click-through rates - about a quarter of those who've downloaded it use the preview or purchase option in any given month, with a third of those going on to buy the track.

OCC are looking at offering extra content such as historic charts in the future.

COST TO DOWNLOAD: £1.79



Groupie

This acts as a gig listing service but has the added functionality of being able to analyse data from last.fm users' accounts in order to recommend acts or notify fans when new dates are announced. Another similar app is IConcertCal, which creates a 'concert calendar' based on artists in your music library.

COST TO DOWNLOAD: £0.59

Airplay Analysis

Top 20 Airplay Tracks September 2009

TM	LM	Title	Artist	Company	Plays	Audience (m)
1	7	Boys And Girls	Pixie Lott	Mercury	9,915	314.7
2	14	Celebration	Madonna	Warner Bros	9,096	217.9
3	1	I Gotta Feeling	Black Eyed Peas	Polydor	12,137	217.3
4	18	We Are Golden	Mika	Universal Island	5,451	201.4
5	2	Sweet Dreams	Beyonce	RCA Label Group	12,225	186.0
6	9	Holiday	Dizzee Rascal	Dirtee Stank	6,527	184.6
7	3	Beat Again	JLS	Epic Label Group	11,635	183.6
8	new	Sexy Chick	David Guetta ft Akon	EMI Records	6,027	182.1
9	new	Bodies	Robbie Williams	Virgin	3,835	171.2
10	new	Break Your Heart	Taio Cruz	Universal Island	6,122	164.2
11	new	Million Dollar Bill	Whitney Houston	RCA Label Group	6,475	161.8
12	new	Remedy	Little Boots	Atlantic Records UK	6,799	159.3
13	19	Get Sexy	Sugababes	Universal Island	6,660	154.4
14	new	Bad Boys	Alexandra Burke	RCA Label Group	7,245	152.8
15	6	Ready For The Weekend	Calvin Harris	Columbia Label Group	7,879	146.8
16	new	Haven't Met You Yet	Michael Buble	Warner Bros	3,885	143.2
17	new	She Wolf	Shakira	RCA Label Group	5,732	134.1
18	new	New York	Paloma Faith	Epic Label Group	1,876	133.1
19	new	Song Away	Hockey	Virgin	2,139	124.5
20	new	Run This Town	Jay-Z ft Rihanna & Kanye West	Atlantic Records UK	3,462	124.0

Source: Nielsen Music Control

Introduction

The BPI monthly report for members now features airplay charts from Nielsen Music Control, which compiles data for the UK as well as most other European territories. Nielsen collects data from more than 150 radio & TV stations in the UK and over 800 stations throughout Europe.

Stations are monitored around the clock using bespoke technology located at key sites which are equipped with receivers tuned into local and national radio & TV stations. Music broadcast is then matched against Nielsen's database of over 500,000 encoded titles. Each title can then be allocated a precise listenership using the latest half hourly Rajar figures.

The charts are ranked in order of the audience size rather than the number of individual plays each track has received.

Each monthly report features the Top 20 as well as the Top 10 tracks for the year and a small feature on a specialist station.



Monthly Chart

Pixie Lott tops chart for second time

Pixie Lott's second single, *Boys and Girls*, is also her second to reach Number One in the airplay charts, following *Mama Do* in June. *Boys and Girls* was by some distance the most-heard track in September, reaching an audience of 314.7m - some 97m more than Madonna's *Celebration* in second place.

Beyonce's *Sweet Dreams* was the most-played track of the month, narrowly edging out Black Eyed Peas' *I Gotta Feeling*, last month's Number One.

The highest new entry was David Guetta's *Sexy Chick*, although it was interesting to note the early support for Robbie Williams' *Bodies*, which wasn't due for release until October 12th.

His album *Reality Killed The Video Star* is one of the most eagerly anticipated of quarter four, along with Whitney Houston's *I Look To You*, which has already been a Number One in America. *Million Dollar Bill* is the lead single in the UK and precedes the album's release in mid-October.



Last year's X-Factor winner Alexandra Burke will be releasing her debut album

Overcome in the same week and the first single from it - *Bad Boys* - picked up strong radio support in September ahead of its release.



Michael Buble's *Haven't Met You Yet* was another pre-release track to receive much airplay - his new album *Crazy Love* is another October release, due on the 19th.



Airplay Analysis

Top 10 Airplay Tracks Year to Date

Pos	LM	Title	Artist	Company	Plays	Audience (m)
1	1	The Fear	Lily Allen	Parlophone	56,993	1,197.9
2	2	Broken Strings	James Morrison ft. Nelly Furtado	Polydor	66,612	1,104.4
3	3	Poker Face	Lady Gaga	Polydor	57,255	1,065.6
4	4	Just Dance	Lady Gaga	Polydor	47,727	1,006.9
5	5	Halo	Beyonce	RCA Label Group	56,500	981.6
6	6	Please Don't Leave Me	Pink	RCA Label Group	47,293	813.1
7	8	Not Fair	Lily Allen	Parlophone	35,853	789.5
8	new	Beat Again	JLS	Epic Label Group	38,905	783.1
9	new	Mama Do	Pixie Lott	Mercury	43,316	775.6
10	7	Up All Night	Take That	Polydor	36,400	774.2

Source: Nielsen Music Control

Year To Date

JLS and Pixie Lott enter Top 10

The debut singles by JLS and Pixie Lott both entered the year-to-date Top 10 in September. *Beat Again* has now reached a cumulative audience of 783.1m and was number one in the airplay chart for three consecutive weeks across July and August.

Mama Do was also a summer airplay Number One and raced to the top of the monthly chart in June. It has been played over 43,000 times and has reached an audience of over three quarters of a billion in 2009.

The top six remained the same although four tracks have now reached an audience total of over 1bn, with Lady Gaga's *Poker Face* and *Just Dance* passing that marker in September.

Beyonce also looks almost certain to exceed that total in October - *Halo* added an extra 62.9m in audience in September and is now only 28.4m away from the 1bn mark. It's been another tremendously successful year for her, with *Sweet Dreams* and *Single Ladies (Put A Ring On It)* both making the monthly airplay Top Five this year as well as *Halo* itself.



Station Focus Magic

Magic originated as an AM station (Magic 828) in West Yorkshire in 1990 as a sister station to Radio Aire. When Emap bought both stations in 1995 the brand began to be rolled out to several AM stations across the group.

Now owned by Bauer, at present the content is a mix of networked and local programmes, with stations in eight

northern cities as well as London. This latter station's September output is profiled in the chart to the right. James Morrison's *Broken Strings* typifies the



style of contemporary content the station favours, which also mixes in classic hits from previous decades. Currently active acts do dominate the playlist though, and relatively new artists such as Jon Allen and Jason Mraz have enjoyed strong support.

Magic 105.4 - Top 10 September

TM	Title / Artist	Company	Plays	Audience (m)
1	Broken Strings James Morrison ft Nelly Furtado	Polydor	90	12.2
2	I'm Yours Jason Mraz	Atlantic Records UK	90	12.1
3	Haven't Met You Yet Michael Buble	Warner Bros	90	11.9
4	Fugitive David Gray	Polydor	88	11.3
5	Down By The River Jon Allen	Monologue	85	11.2
6	Rule The World Take That	Polydor	60	8.0
7	Lucky Jason Mraz ft Colbie Caillat	Atlantic Records UK	50	6.8
8	Simple Love Alison Krauss	Decca	41	5.4
9	Save The Last Dance For Me The Drifters	RCA Label Group	41	5.2
10	Too Much, Too Little, Too Late Johnny Mathis & Deniece Williams	RCA Label Group	36	4.5

Source: Nielsen Music Control

Web Traffic - Experian Hitwise

Web Traffic Data

Internet traffic monitoring company Experian Hitwise has a number of different music-related categories and a handful of charts from these for September are reproduced on this page.

The top table ranks websites of different acts by number of internet visits in the UK across the month, expressed (in the right hand column) as a percentage of all visits monitored within the category.

Most-visited sites

The release of Muse's *The Resistance* album resulted in their official website attracting the most hits in the bands/artist category as well as topping the most-searched-for chart. They were closely followed by US rock act Paramore, whose *Brand New Eyes* album was due for release in the first week of October.

Arctic Monkeys' website also recorded an upsurge in traffic due to the release of their new album and the highest new entry was the official site of Robbie Williams, whose *Bodies* single was due in the third week of October with its parent album due in the second week of November.



Michael Jackson's site also re-entered the Top 10 as the release of a new concert film and unreleased track - both titled *This Is It* - neared.

Top talent show artist searches

TV shows such as X-Factor and Britain's Got Talent continue to provide some of the biggest stars in music, and many of the alumni have new albums imminent. Leona Lewis was the most searched-for of these artists in September - her second album *Echo* is due in the middle of November. Alexandra Burke's debut is released in the third week of October, while 2008 finalist Diana Vickers is currently starring in *Little Voice* in the London's West End.

Top ticket searches

The release of Paramore's third album resulted in demand for information about concert tickets eclipse that of all other artists in September. The band tour the UK in December.

An interesting new entry in the Top 10 is Them Crooked Vultures - a supergroup comprising members of Queens of the Stone Age, Led Zeppelin and Foo Fighters.

Top 10 Most-Visited Band/Artist Sites, Sept 2009

Pos	LM	Website	Domain	Market Share
1	3	Muse	www.muse.mu	2.86%
2	6	Paramore	www.paramore.net	2.09%
3	7	Arctic Monkeys	www.arcticmonkeys.com	1.30%
4	new	Robbie Williams	www.robiewilliams.com	1.22%
5	2	U2	www.u2.com	1.17%
6	4	Oasis	www.oasisnet.com	1.05%
7	new	Michael Jackson	www.michaeljackson.com	1.03%
8	new	Coldplay	www.coldplay.com	1.03%
9	10	Peter Andre	www.peterandre.com	0.97%
10	5	Lady Gaga	www.ladygaga.com	0.87%

Source: Experian Hitwise

Top 5 Band/Artist Searches, September 2009

Pos	Search	Market Share
1	Muse	1.85%
2	Paramore	1.33%
3	Arctic Monkeys	1.23%
4	Oasis	1.07%
5	Peter Andre	1.01%

Source: Experian Hitwise

Top 5 Talent Show Artist Searches, Sept 2009

Pos	Search	Market Share
1	Leona Lewis	0.07%
2	Girls Aloud	0.07%
3	Alexandra Burke	0.06%
4	Diana Vickers	0.03%
5	Dolly Rockers	0.03%

Source: Experian Hitwise

Top 10 Ticket Searches

Pos	LM	Ticket Search
1	new	Paramore
2	2	Muse
3	new	Beyonce
4	5	Coldplay
5	new	Arctic Monkeys
6	4	Kasabian
7	9	Florence & The Machine
8	8	Kings Of Leon
9	6	Pink
10	new	Them Crooked Vultures

Source: Hitwise



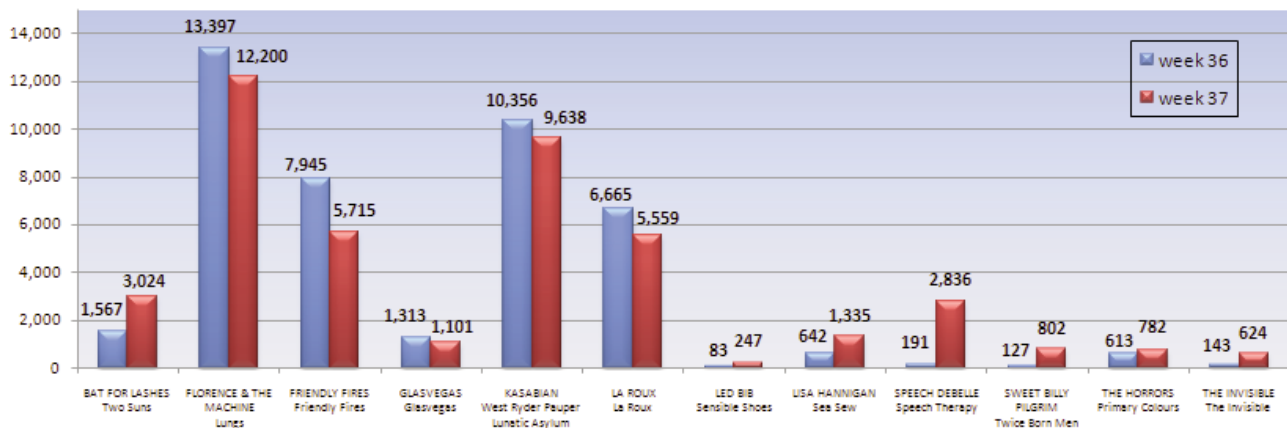
Experian Hitwise is a leading online competitive intelligence service, giving marketers a competitive advantage by providing daily insights on how 25 million Internet users around the world interact with more than 1 million Web sites.

This external view helps companies grow and protect their businesses by identifying threats and opportunities as they develop. Experian Hitwise has more than 1,500 clients across numerous sectors, including financial services, media, travel and retail.

More information about Experian Hitwise is available at www.hitwise.co.uk.

2009 Barclaycard Mercury Prize

2009 Mercury Prize Nominees : album sales - week 37 v week 36



Barclaycard Mercury Prize

The 2009 Barclaycard Mercury Prize ceremony was held at the Grosvenor House Hotel on the evening of Tuesday September 8th (chart week 37). The winner was announced during a live half-hour broadcast on BBC2, with a lengthier highlights show broadcast the following Friday on the same channel.

Sales Uplift - Winner

Media interest in the event was, as always, high and after the nominations were announced on July 21st (week 30) much was made of the number of female artists shortlisted, with **La Roux** and **Florence & The Machine** immediately ranked among the frontrunners by bookmakers.

The winner, however, was a female artist whose odds were slightly longer - **Speech Debelle**. Her album *Speech Therapy* was released at the beginning of June on the London-based independent Ninja Tune, whose Roots Manuva was nominated (for *Run Come Save Me*) in 2002.



Prior to its nomination *Speech Therapy* had sold just over 1,000 copies. In the interim between the nominations and the show, it sold a further 1,679 - an average of 240 a week, compared with 155 before week 30.

In the week of its announcement as winner, the album sold 2,836 copies - an uplift of 1,385% on the week before. The album also achieved its first ever chart placing, entering at Number 65.

Sales Uplift (%) wk 37 vs wk 36

Speech Debelle	1,385%
Sweet Billy Pilgrim	532%
The Invisible	336%
Led Bib	198%
Lisa Hannigan	108%
Bat For Lashes	93%
The Horrors	28%

Source: OCC

Sales Uplift - Nominees

As would be expected, Speech Debelle's uplift in both percentage and unit terms was the greatest of all 12 nominees.

When uplift is expressed in percentage terms, the nominees with the smallest base of sales benefitted the most: the Top Four in the chart above all sold less than 500 copies in week 36.

Aside from *Speech Therapy*, however, only one title achieved a unit uplift of over 1,000 copies: **Bat For Lashes' *Two Suns*** started from a sales base of 1,567



in week 36, which increased to over 3,000 copies in week 37.



Lisa Hannigan's *Sea Sew* and **Sweet Billy Pilgrim's *Twice Born Men*** were the only other titles to record unit uplifts of over 500 copies, although **The Invisible's** self-titled album only just missed that.

Chart Positions

Whereas all twelve nominees in 2008 were placed in the Top 200 in the week of the ceremony - with eight of them new entries - only eight from this year's shortlist made the Top 200 in week 37.

The highest placed was Florence & The Machine's *Lungs*, although that dropped slightly from Number Eight a week before. The biggest climbers were *Speech Therapy* and *Sea Sew*, which entered the chart at Numbers 65 and 125 respectively, while *Two Suns* climbed from number 109 to 63.

Biggest Winners Uplifts (%)

Speech Debelle (2009)	1,385%
Antony & The Johnsons (2005)	868%
Elbow (2008)	635%
Talvin Singh (1999)	437%
Roni Size/Reprazent (1997)	214%
PJ Harvey (2001)	127%
Gomez (1998)	115%
Portishead (1995)	104%

Source: OCC

Historical Comparisons

While not a vintage year for all-round uplift - although it should be remembered that the day after the ceremony the Beatles catalogue was reissued - *Speech Therapy* now tops the chart for the sales increase enjoyed, in percentage terms, by a winner. While the lack of OCC data from the first two years means that winners by Primal Scream and Suede are omitted from any comparison, *Speech Therapy's* increase of 1,385% far exceeds that of the previous record holder, Antony and The Johnsons' *I Am A Bird Now*, from 2005.

Company Profile - Plastic Head



Based in Wallingford, Oxfordshire, **Plastic Head** made its reputation as a distributor but has since moved into merchandising and also has a stake in labels such as Candlelight and Powerage.

It currently employs over 50 staff and exclusively handles distribution in the UK for over 200 labels across more than 40,000 titles. It was established in 1990 and its co-director/owners are Steve Beatty and Elaine Sutcliffe.

History

Steve Beatty's first real foray into music was through the setting up of his own punk/hardcore label Endangered Music. Although the label's first release was a 7" single in 1985, Steve had already been active on the 'distro' scene, trading fanzines and tapes at gigs and festivals, making many contacts along the way.

After six singles - including a sizeable indie chart hit by Antiseptic - and two LPs, Steve joined forces with John Hyde, owner of a label called Plastic Head. Steve's enthusiasm led to a number of pressing and export deals being struck up at this stage and, disillusioned with the label's current distribution deal, began to start selling direct.



Shortly after, Steve met Elaine Sutcliffe, an ex-Island Records employee who became his business partner and co-director/owner. The newly-formed Plastic Head Distribution's (PHD) first deal was with the German label Nuclear Blast, today one of the world's biggest metal labels and still a PHD client, and the company began to build a solid reputation.

The Next Level

Steve cites the success in 1994 of The Offspring's *Smash* on the Epitaph label as one of the defining moments in PHD's evolution.

Plastic Head - Best Selling Albums - 2009 YTD

	Artist	Title	Label
1	Deathstars	Night Electric Night	Nuclear Blast
2	Chimaira	The Infection	Nuclear Blast
3	Gaslight Anthem	Sink Or Swim	XOXO
4	Nofx	Coaster	Fat Wreck Chords
5	Cannibal Corpse	Evisceration Plague	Metal Blade
6	Nightwish	Dark Passion Play	Nuclear Blast
7	Therapy	Crooked Timber	Demolition
8	Hammerfall	No Sacrifice No Victory	Nuclear Blast
9	Nightwish	Made In Hong Kong	Nuclear Blast
10	Amon Amarth	Twilight Of The Thunder God	Metal Blade



An appositely named album, it sold around 100,000 copies and resulted in a huge number of new accounts for PHD. Soon after, Green Day's first two albums

also shipped around the same amount and, even though Epitaph eventually moved to Pinnacle, other labels - such as Metal Blade and SST - were so impressed with PHD's work on The Offspring that they moved in to fill the void.



With almost 50 years of trading between them, **Metal Blade** (home to death metal legends Cannibal Corpse and the label that discovered and signed Slayer) and **Nuclear Blast**



(whose *In Flames* and *Dimmu Borgir Plastic Head* helped chart in the UK) are two long-standing partners, with the latter a client for some 18 years. PHD also have an enduring relationship with US punk imprint **Fat Wreck Chords**, which has a catalogue of well over 200 titles.

The company also has a stake in UK stalwart **Candlelight**, whose discoveries have included influential metal acts such as Emperor and Opeth. Emperor's debut full-length, *In The Nightside Eclipse*, is the label's best seller (see chart below). The band are recognised as one of the forefathers of the Black Metal genre and have sold over three quarters of a million albums worldwide.

Candlelight - Best Selling Albums

	Artist	Title	Year of Release
1	Emperor	In The Nightside Eclipse	1994
2	Opeth	My Arms Your Hearse	1998
3	1349	Hellfire	2005
4	Insomnium	In The Halls Of Awaiting	2002
5	Obituary	Darkest Day	2009
6	Emperor	IX Equilibrium	1999
7	Opeth	Orchid	1995
8	Zyklon	World Ov Worms	2001
9	Abigail Williams	In The Shadow Of 1000 Suns	2008
10	Nachtmystium	Assassins	2008

Company Profile - Plastic Head

There is also a new imprint in the form of **Powerage**, a tie-in with Classic Rock magazine, whose signings include Bigelf, New Device and Viking Skull.

Although the company has strong ties to the Metal scene, Plastic Head have always been determined not to be pigeonholed. Some of their recent deals have demonstrated this clearly, with **Cherry Red** - perhaps best known for indie/alternative repertoire - and **Ace** - whose catalogue encompasses Rock 'n' Roll, Soul and Blues - both striking agreements.

Best Sellers

PHD's 2009 best sellers (see chart on previous page) encompass a variety of



styles and nationalities, from the Springsteen tinges of festival favourites The Gaslight Anthem to the self-styled 'deathglam' of Sweden's Deathstars and the more

symphonic flourishes of bands such as Finland's Nightwish.

Death Metal is represented in the form of the eleventh album by Cannibal Corpse, widely recognised as the biggest-selling DM band ever, having sold over one million albums in their career.



Beyond the CD

Although CDs form the bulk of the recorded music side of the business, the company also handles a large selection of titles on **vinyl**, one such label being Steve's own Back On Black reissue imprint (see sidebar). Around 5,000 titles are available at any one time. **Merchandising** is another key strand of the business and one that has been in existence for over 15 years. Plastic Head provides merchandise for tours, retail, wholesale and export and has an in-house

design team who work with new clients. At the moment the company produces merchandise for some of the biggest names in Hard Rock, including Queen, Thin Lizzy and AC/DC.

The links already established through the music distribution side of the business means that product can be shipped to retailers around the world, including around 500 key independents. The company also offers **e-commerce** solutions for labels, who can either sell their merchandise through Plastic Head's own online store or have them design and service a bespoke web store of their own.



Digital and Online

The company's **digital** arm, Plastic Head Media (PHM), offers labels a distribution service for the download version of their physical releases, with PHM handling the administration, uploading of content and registration of publishing credits as well as the preparation of metadata. The company also **sell online** direct to the public via www.plastichead.com.

Future Plans

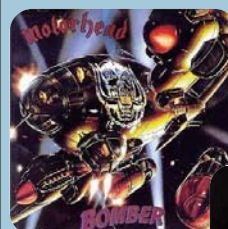
The autumn release schedule has been busy for PHD, with several new Candlelight releases (including full-lengths by Forest Stream, Savage Messiah, Atlas Moth, Insomnium and a mini album by Nachtmystium) and new titles from Rise Above, the label run by Lee Dorrian (Cathedral, ex-Napalm Death). The company are also planning to expand the fast-growing export side of the business.

Back On Black

Back On Black was launched in 1994 and is Steve's own vinyl-only reissue imprint. Every title is remastered and pressed on heavy duty 180 gram vinyl, often coloured.

As a self-confessed LP fan, Steve's chief motivation was simply to "start a label and indulge myself releasing records I liked", although prices on the collector's market were another incentive to make classic titles available on the format once more. Aesthetic issues were another key consideration: "(vinyl)'s big, looks nice and sounds amazing".

Steve licenses from a wide variety of



sources and his catalogue, now encompassing over 150 releases, has taken in artists



such as Motorhead, Megadeth and Slayer as well as cult classics from more underground acts such as Hellhammer, Dissection and Mayhem.

New and forthcoming releases on the label include titles by:

- Corrosion Of Conformity
- Thin Lizzy
- Motorhead
- Mercyful Fate
- Venom
- Arch Enemy
- UFO
- Amon Amarth

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