



Research Presentation  
February 2020

# Research Purpose

*How well (or not)  
do Country PD's  
know their audience?*

# Research Methodology

Two Studies:

**1 – Country Listeners**

**2 – Country PD's**

...with the same questions

# Research Methodology

## Listeners

- N = 800 Respondents
- 18-54-year-old Men and Women
- 100% Country radio listeners (on-air or online)
- 60% Women, 40% Men (by demo)
- National probability study
- 100% RANDOM responses from opt-in, compensated online sources
- Survey length: 15 minutes
- Interviewing dates: Nov 27 – Dec 5, 2019

## Program Directors

- N = 152 Program Directors
- Survey invitation emailed to all Country PD's
- 100% Online study
- Survey Length: 10 minutes
- Interviewing dates: Nov 27 – Dec 5, 2019

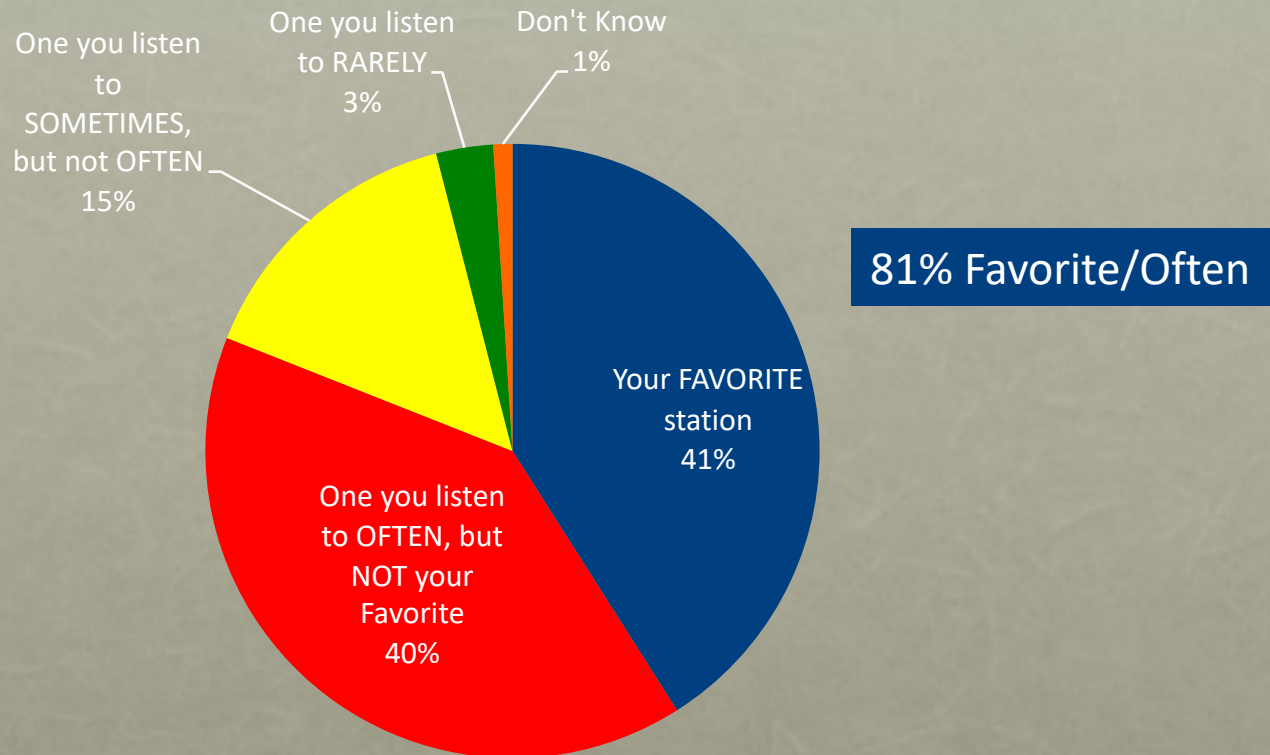
# Listener Profile

100% of Respondents are COUNTRY RADIO listeners

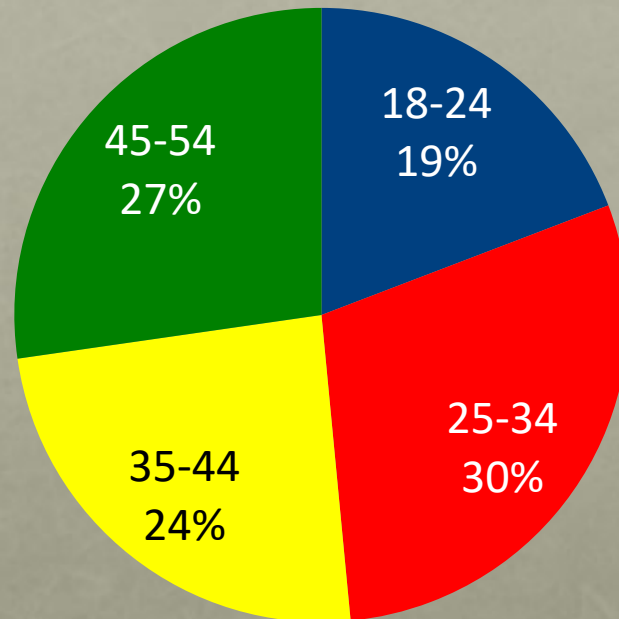
# Defining Country Radio Listeners

“Think of **COUNTRY MUSIC** artists like Blake Shelton, Carrie Underwood, Kenny Chesney, Kacey Musgraves, and Dan and Shay, Do you currently listen to an FM radio station – on-air or online - for **COUNTRY MUSIC** for 30 minutes or more in an average **WEEK**, or not?”

# Country Radio Listenership

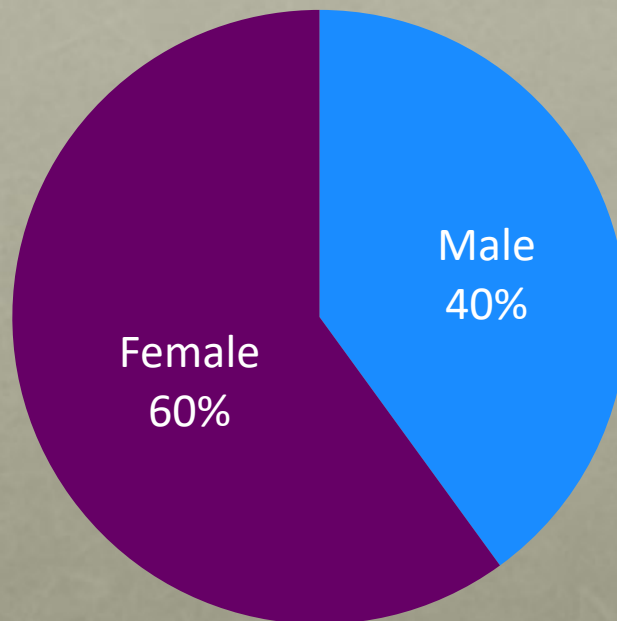


# Listener Age

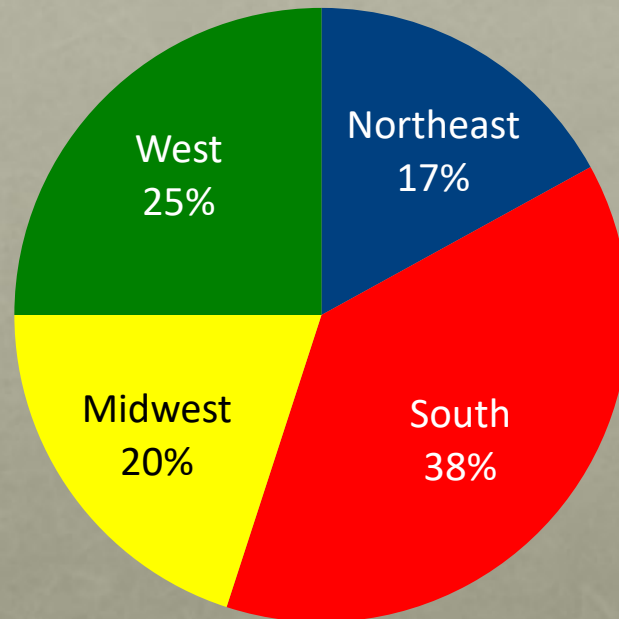




# Listener Sex

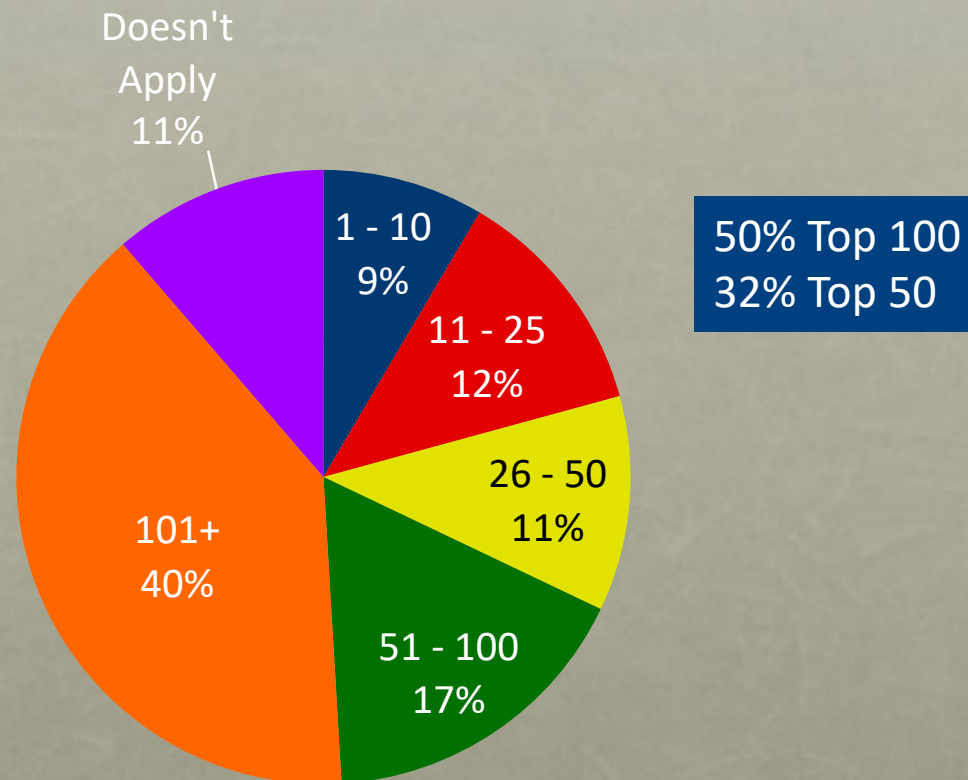


# Listener Region



# Program Director Profile

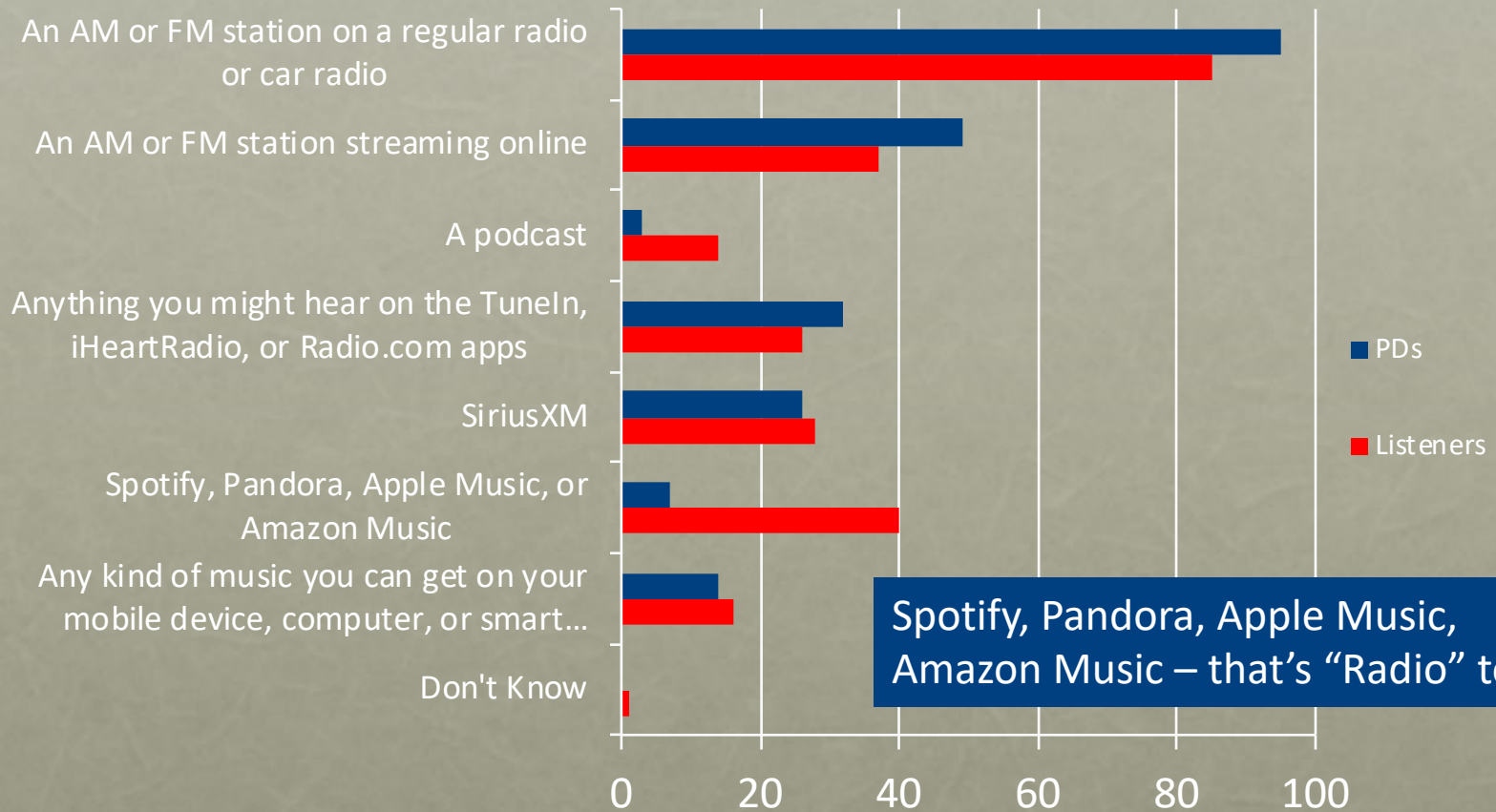
# PD Market Rank



# Radio Definition

When you think about “the radio,” which of the following do you mean?

# Radio Definition – PD's / Listeners



Spotify, Pandora, Apple Music, Amazon Music – that's "Radio" too!

# Radio Definition – Sex/Age

N=  
 An AM or FM station on a regular radio or car radio  
 An AM or FM station streaming online  
 A podcast  
 Anything you might hear on the TuneIn, iHeartRadio, or Radio.com apps  
 SiriusXM  
 Spotify, Pandora, Apple Music, or Amazon Music  
 Any kind of music you can get on your mobile device, computer, or smart speaker  
 Don't Know

	Sex		Age			
	Women	Men	18-24	25-34	35-44	45-54
	480	319	155	232	195	217
An AM or FM station on a regular radio or car radio	84	86	82	85	87	85
An AM or FM station streaming online	31	47	30	46	41	30
A podcast	8	23	13	16	18	7
Anything you might hear on the TuneIn, iHeartRadio, or Radio.com apps	21	32	25	28	28	21
SiriusXM	25	32	23	33	29	23
Spotify, Pandora, Apple Music, or Amazon Music	40	40	52	48	40	24
Any kind of music you can get on your mobile device, computer, or smart speaker	18	14	15	19	16	15
Don't Know	2	0	1	1	2	1

# Platforms and Devices



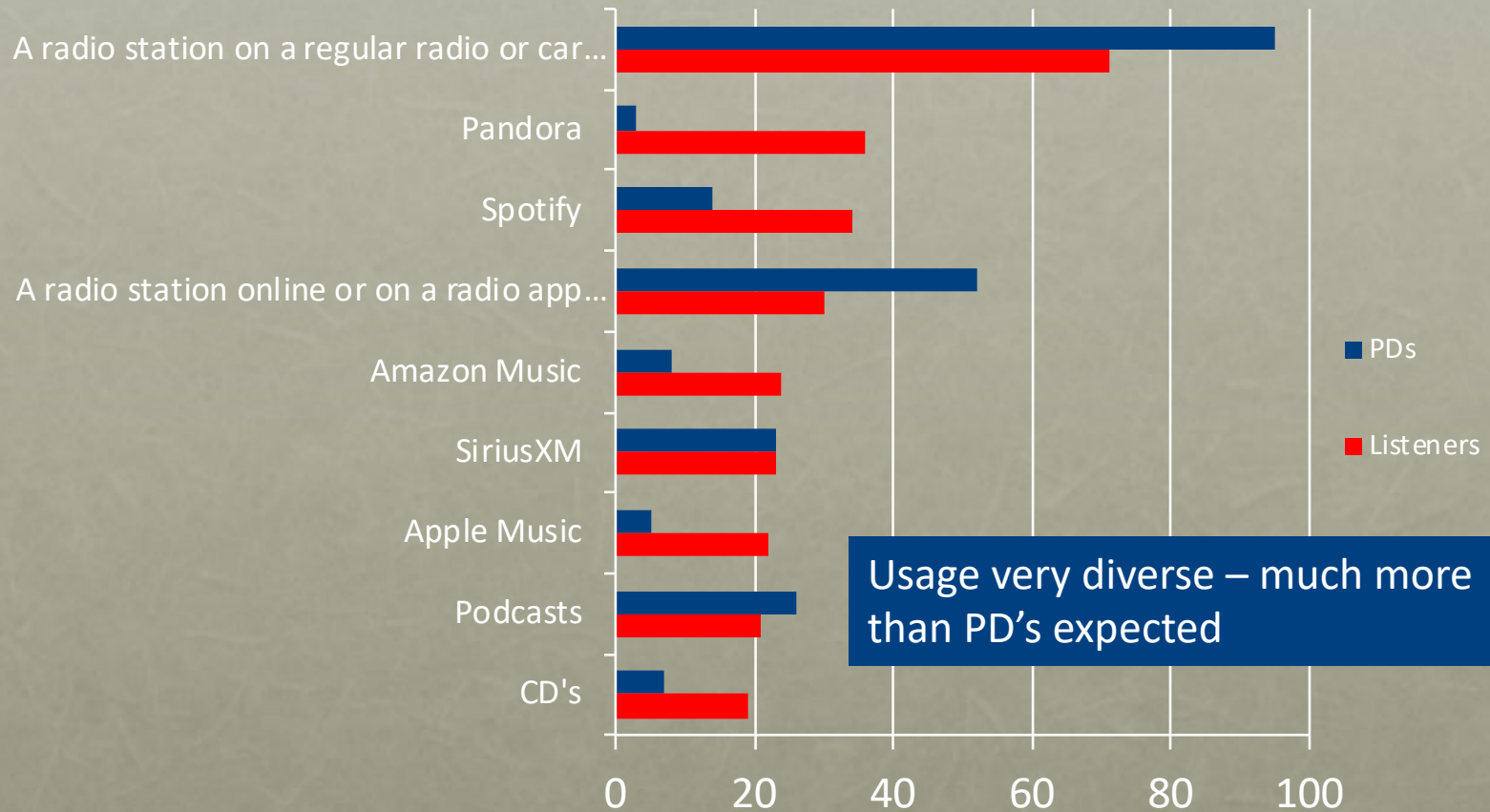
# We Looked At Platforms...

- A radio station on a regular radio or car radio
- Pandora
- Spotify
- A radio station online or on a radio app like TuneIn, Radio.com, or iHeartRadio
- Amazon Music
- SiriusXM
- Apple Music
- Podcasts
- CD's

# Platform Usage – Often

Do you **OFTEN**, **SOMETIMES**, or **ALMOST NEVER** listen to...

# Often Use Platform – PD's / Listeners



# Often Use Platform – Sex/Age

N=  
 A radio station on a regular radio or car radio  
 Pandora  
 Spotify  
 A radio station online or on a radio app like TuneIn, Radio.com, or iHeartRadio  
 Amazon Music  
 SiriusXM  
 Apple Music  
 Podcasts  
 CD's

	Sex		Age			
	Women	Men	18-24	25-34	35-44	45-54
	480	319	155	232	195	217
A radio station on a regular radio or car radio	73	68	64	72	74	72
Pandora	34	39	38	47	34	24
Spotify	33	36	48	40	30	21
A radio station online or on a radio app like TuneIn, Radio.com, or iHeartRadio	27	35	25	34	36	24
Amazon Music	19	31	17	30	31	16
SiriusXM	18	29	16	29	26	17
Apple Music	19	27	35	25	25	9
Podcasts	17	27	18	28	23	15
CD's	17	22	12	22	20	20

PD's need to know the platforms listeners use

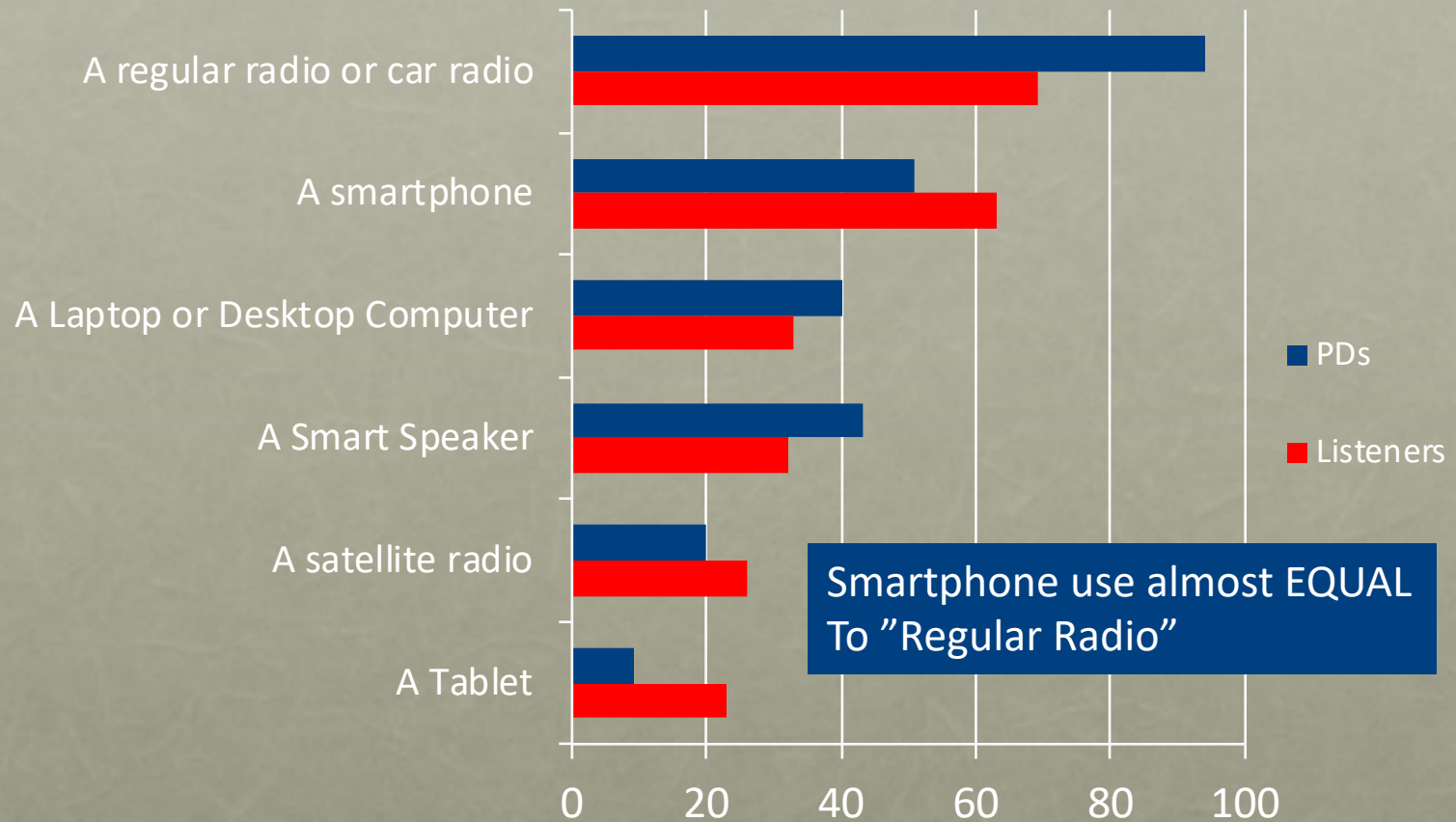
# We Looked At Devices...

- A regular radio or car radio
- A smartphone
- A Laptop or Desktop Computer
- A Smart Speaker
- A satellite radio
- A Tablet

# Device Usage – Often

Do you **OFTEN**, **SOMETIMES**, or **ALMOST NEVER** listen to audio entertainment or information on...

# Often Use Device – PD's / Listeners



Smartphone use almost EQUAL  
To "Regular Radio"

# Often Use Device – Sex/Age

	Sex		Age			
	Women	Men	18-24	25-34	35-44	45-54
N=	480	319	155	232	195	217
A regular radio or car radio	71	67	67	68	73	70
A smartphone	63	64	73	73	67	43
A Laptop or Desktop Computer	31	35	45	37	33	20
A Smart Speaker	30	36	30	38	36	26
A satellite radio	21	34	24	32	27	20
A Tablet	22	25	26	30	24	13

Increasingly, a Smartphone IS the “Radio”

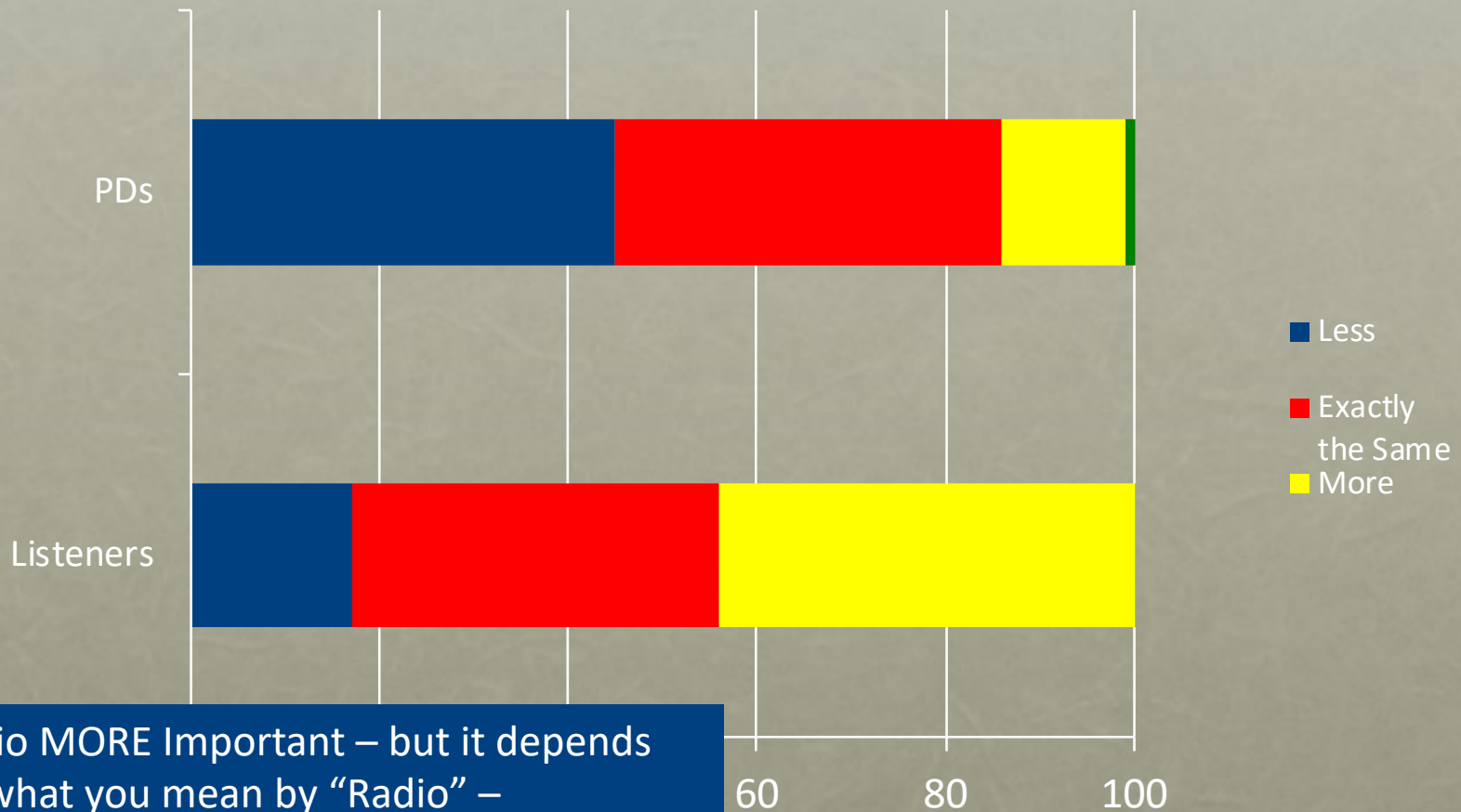


# Importance of Radio – Trends

Compared to **THREE** years ago, would you say that radio is today a **MORE** important part of your life, a **LESS** important part, or neither more nor less important than it was then?

# Importance of Radio – Trends

## – PD's / Listeners



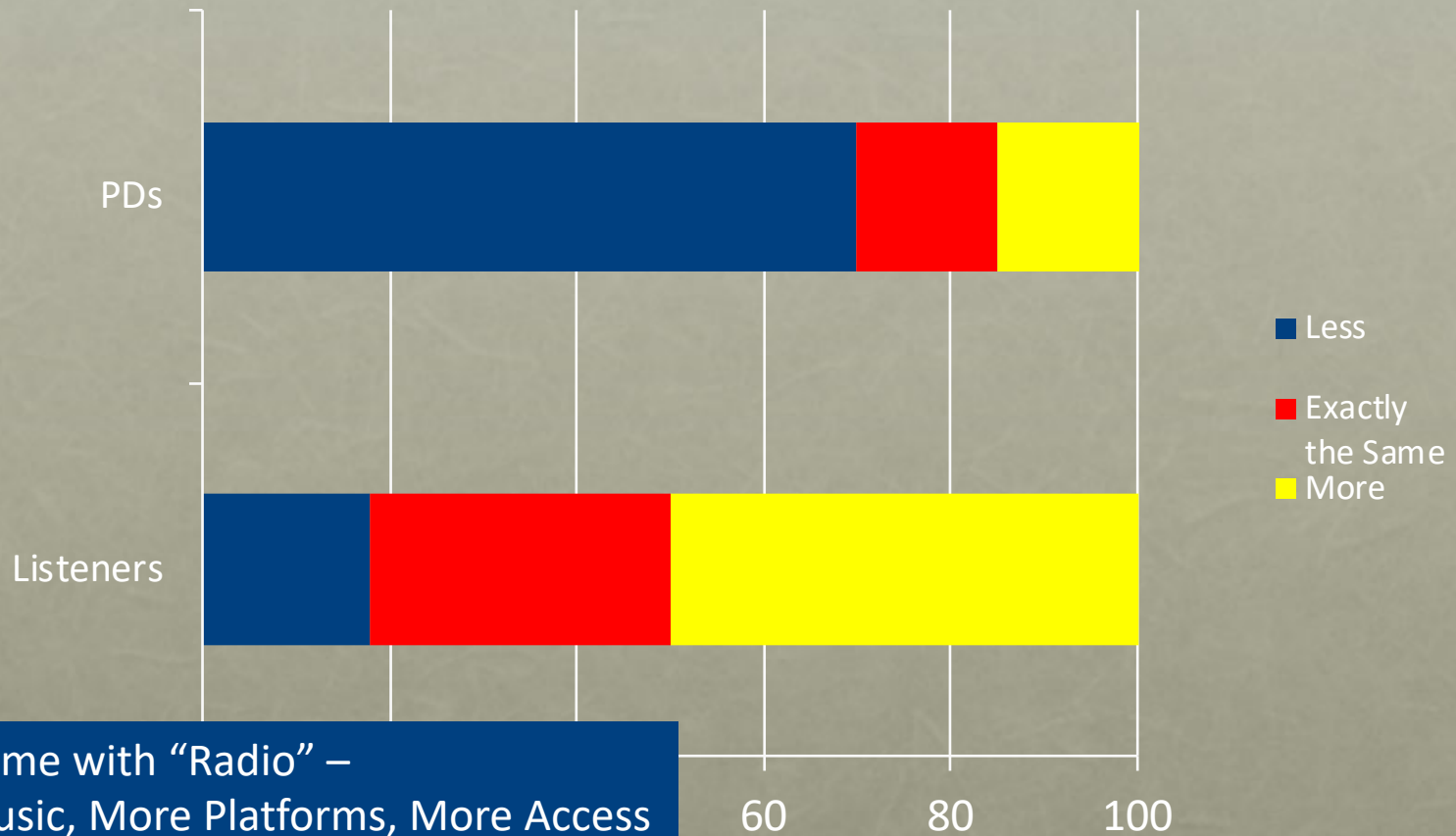
Radio MORE Important – but it depends on what you mean by “Radio” – More Music, More Platforms, More Access

# Time with Radio – Trends

When you think about your listening to radio in general, how do you think the amount of TIME you spend listening to radio overall has changed? **Compared to THREE years ago**, do you now listen to A LOT MORE, A LITTLE MORE, A LOT LESS, A LITTLE LESS, or EXACTLY THE SAME AMOUNT OF RADIO?

# Time with Radio – Trends

## – PD's / Listeners



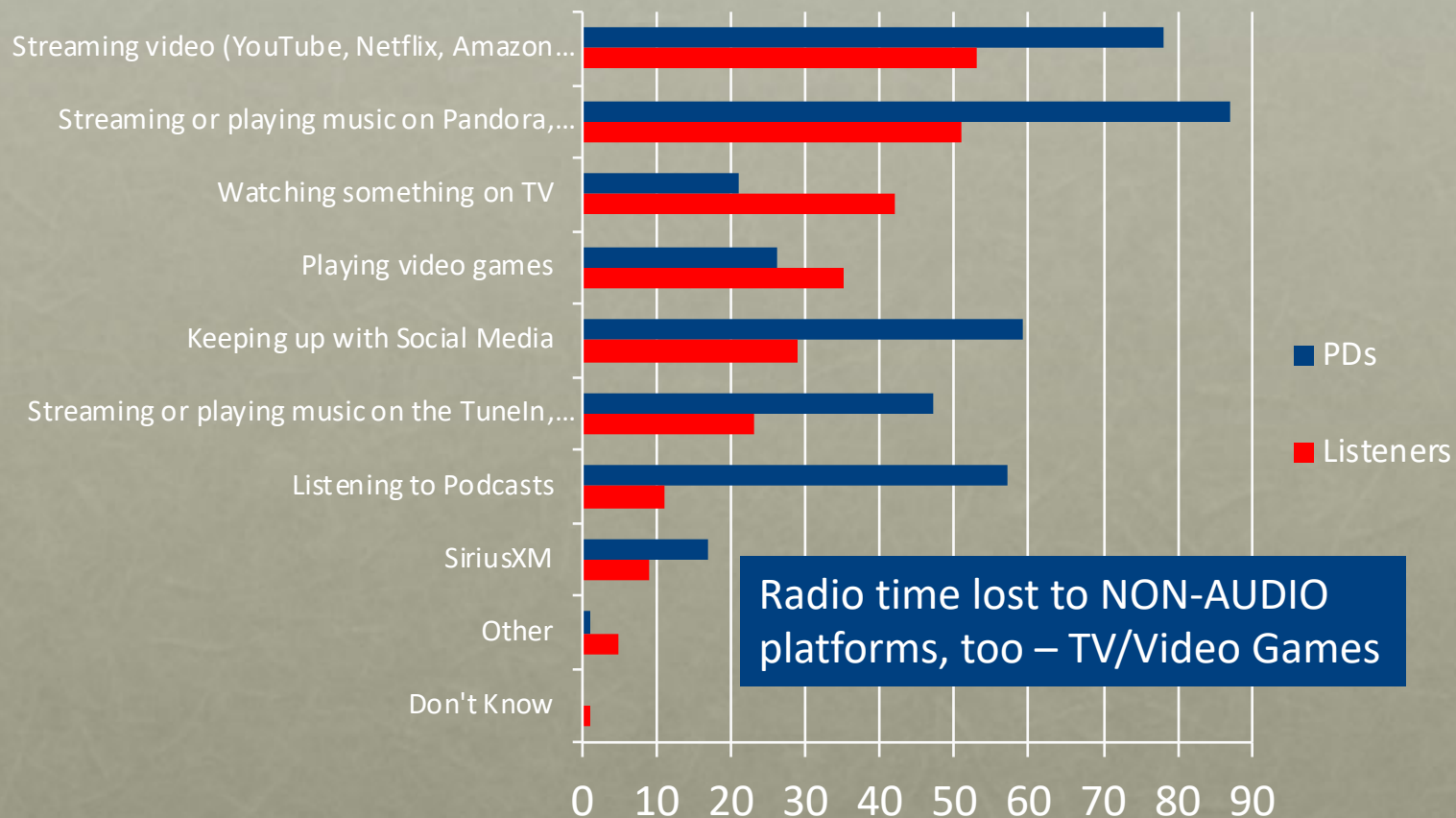
**MORE Time with "Radio" –  
More Music, More Platforms, More Access**

# How Spending LOST Radio Time

*(If Listening LESS to Radio)*

You say you're listening to LESS radio today than you have in the past. How are you spending the time now that you USED TO SPEND WITH RADIO? Are you spending it by doing MORE...

# How Spending LOST Radio Time – PD's / Listeners



Radio time lost to NON-AUDIO platforms, too – TV/Video Games

# Why Choose Radio over Digital Service Providers?

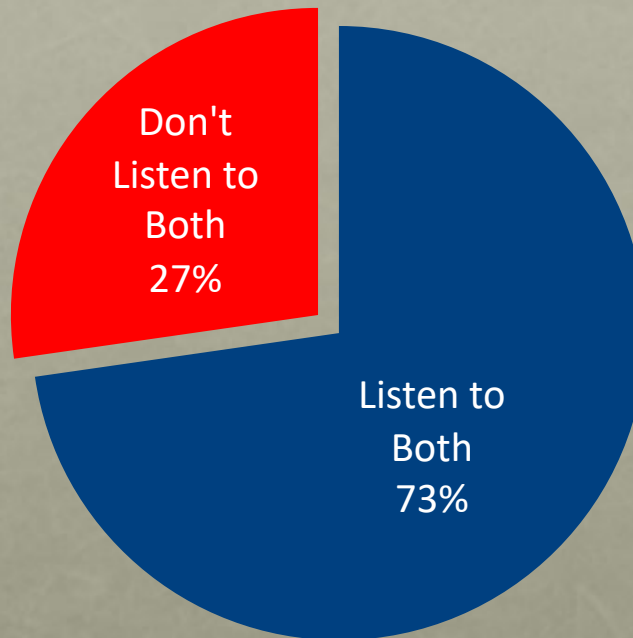
*(If Listen to Both Radio and Digital Service Provider)*

Sometimes you may listen to the radio and sometimes you'll choose a digital audio provider like Spotify or Pandora. When you listen to the RADIO, why do you choose it over a digital audio provider in that moment?

# Listen to BOTH Radio and DSP's – Listeners

“A radio station,  
on-air or online”

“A digital audio  
provider, like  
Pandora, Spotify,  
Apple Music,  
Amazon Music,  
etc. “





# Why Choose Radio Over DSP's – PD's / Listeners



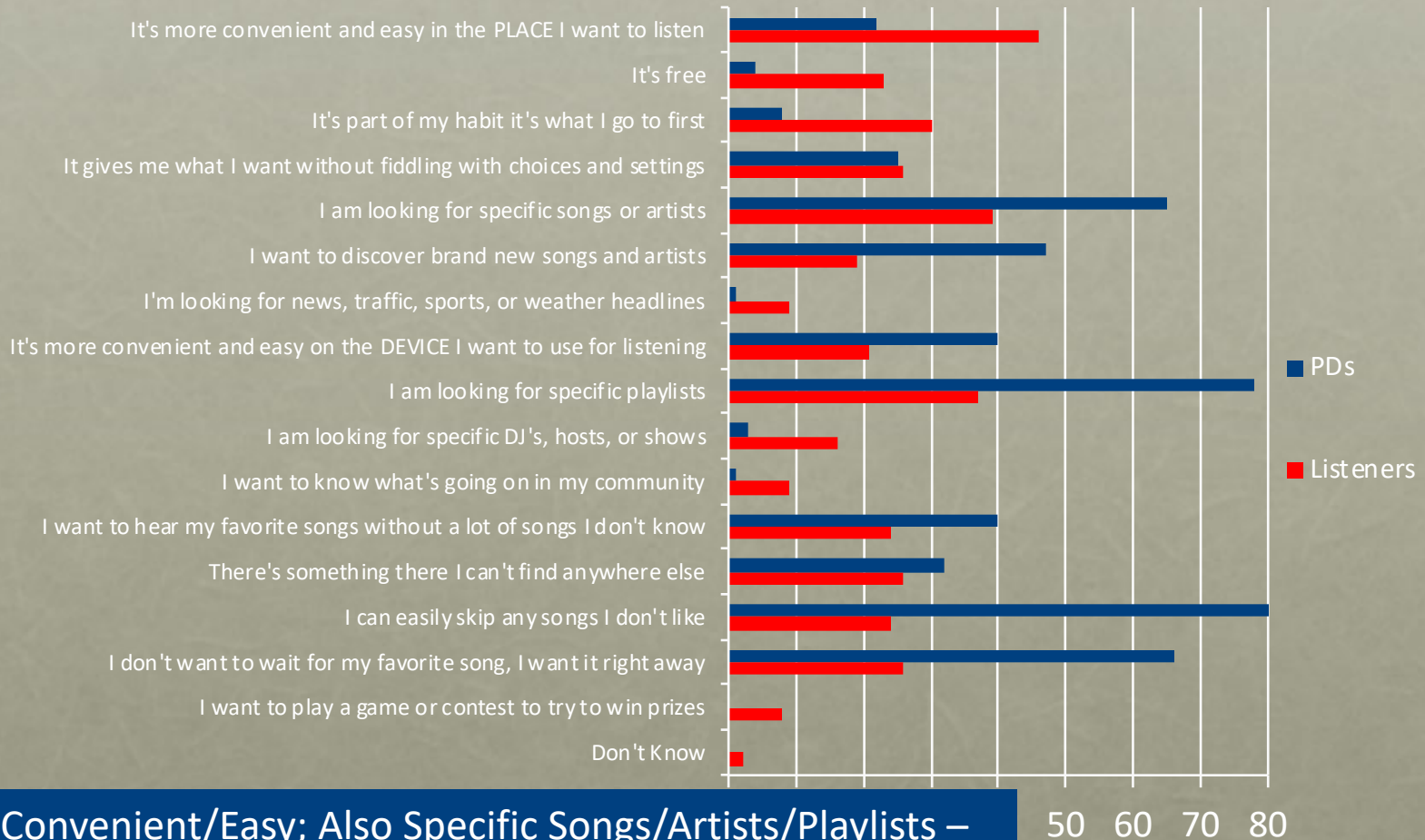
**#1: Convenient / Easy / Free –  
NOT Habit, DJ's, Shows, News, Community, Contests**

# Why Choose DSP's over Radio?

(If Listen to Both Radio and Digital Service Provider)

Now when you listen to a digital audio provider like Spotify or Pandora, why do you choose that over RADIO in that moment?

# Why Choose DSP's over Radio – PD's / Listeners

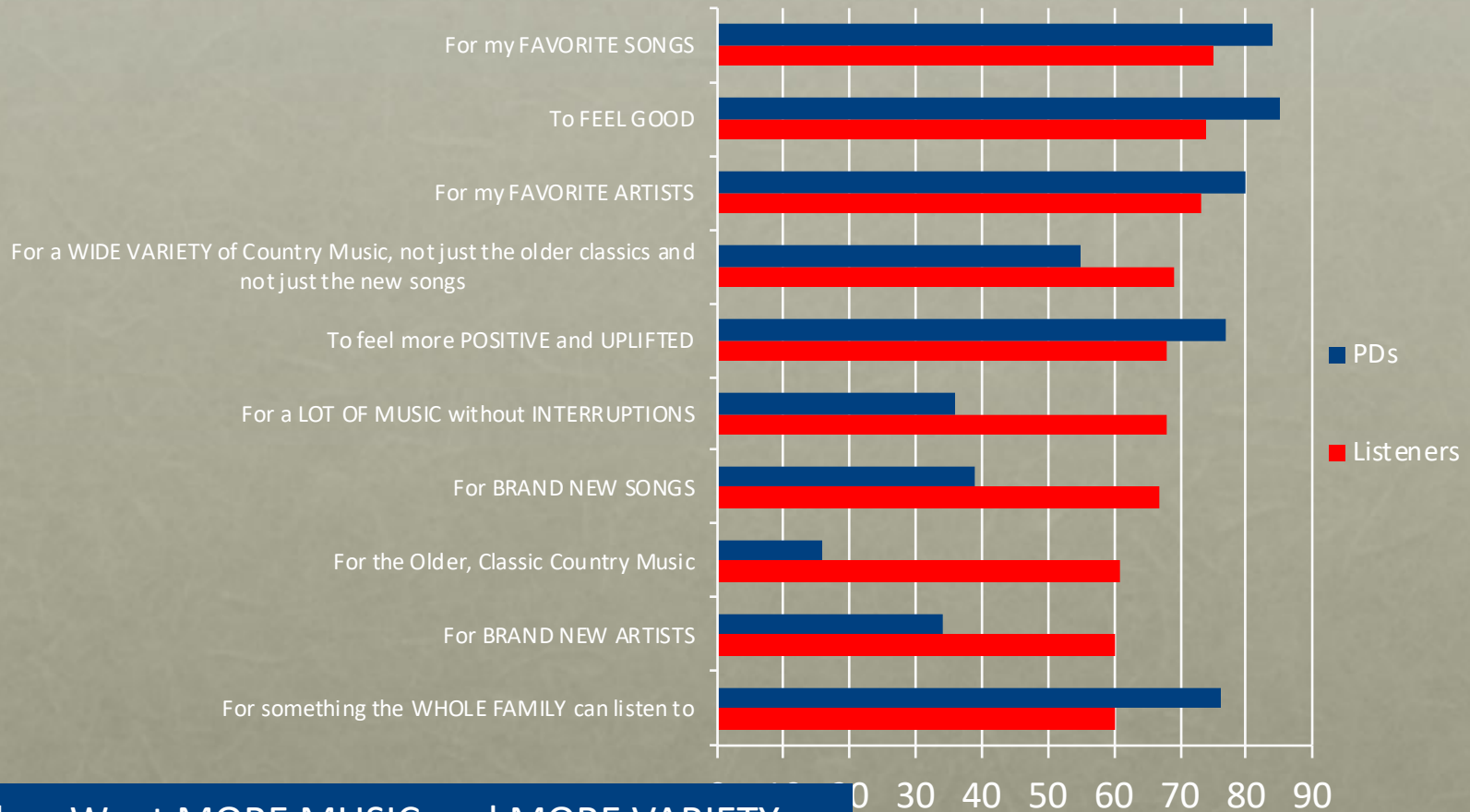


**#1: Convenient/Easy; Also Specific Songs/Artists/Playlists – PD's underestimate Convenience/Easy**

# Country Radio Needs

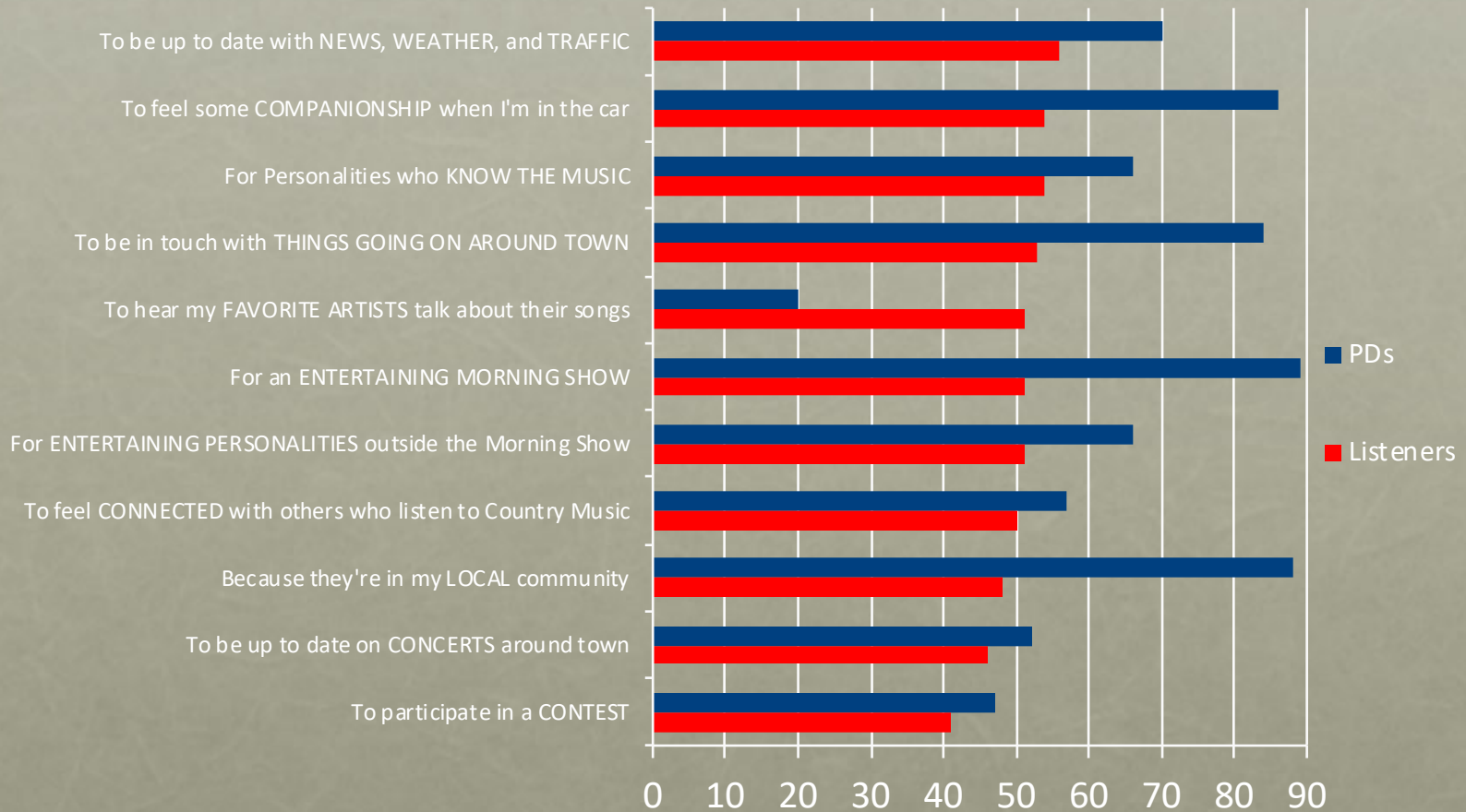
Which of the following best describe why you listen to a Country Music Radio Station? Using a scale from "1" (**NOT IMPORTANT REASON TO LISTEN**) to "5" (**VERY IMPORTANT REASON TO LISTEN**), why do you listen?

# Country Radio Needs – PD's / Listeners – I



They Want MORE MUSIC and MORE VARIETY – More New Songs, New Artists, Older Songs, too

# Country Radio Needs – PD's / Listeners – II



Let my Favorite Artists talk about their songs; Companionship, Being Local, Entertaining Morning Show less important than PD's think

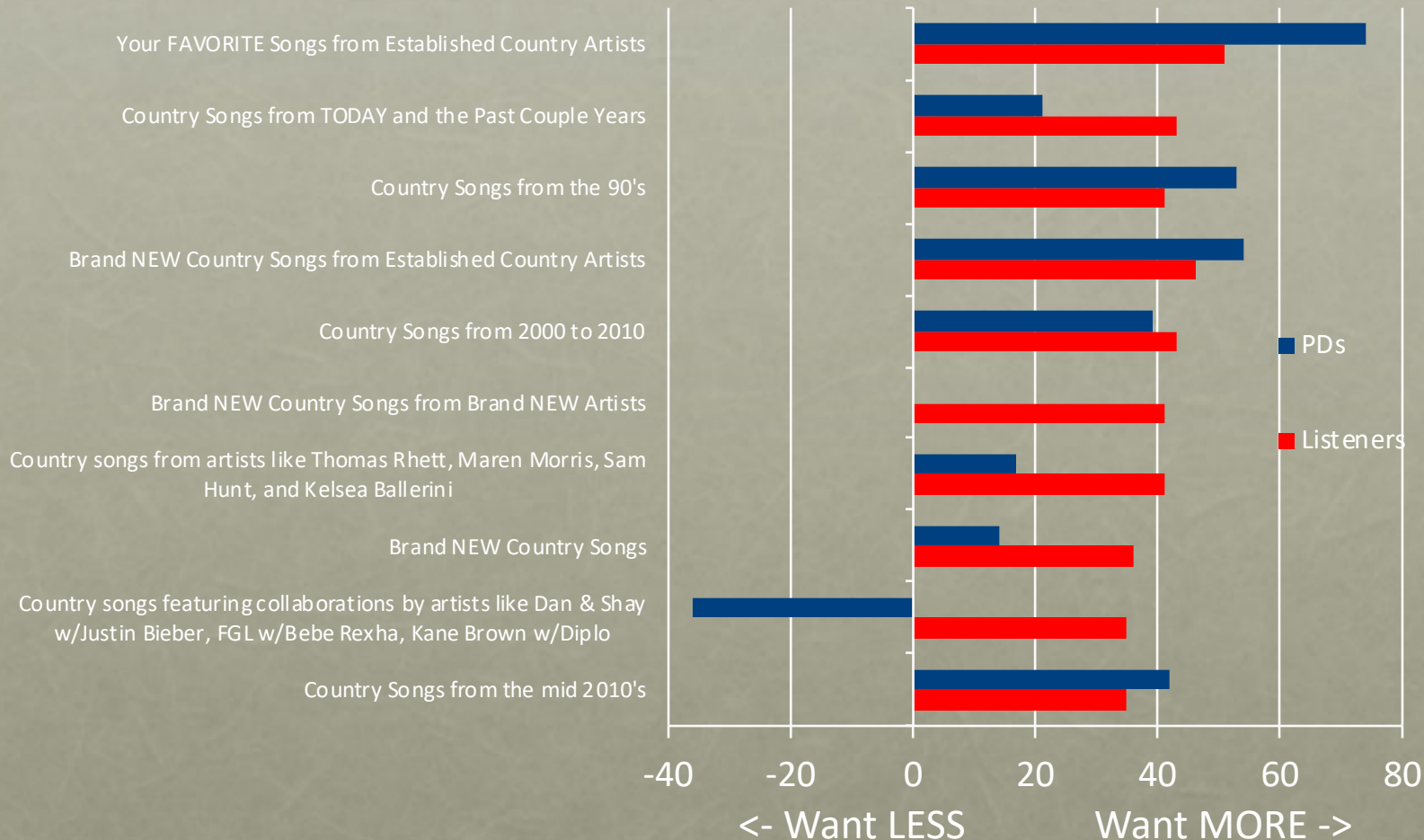
# Country Radio Balance

Think about the music mix on your favorite local Country music station. We'll use a rating scale where a "1" means you'd like your favorite local Country station TO PLAY LESS of this music, and a "5" means you'd like them to PLAY MORE of it. You can also use any number in between,

Would you like your local Country music station to play MORE or LESS...

# Country Radio Balance

## – PD's / Listeners



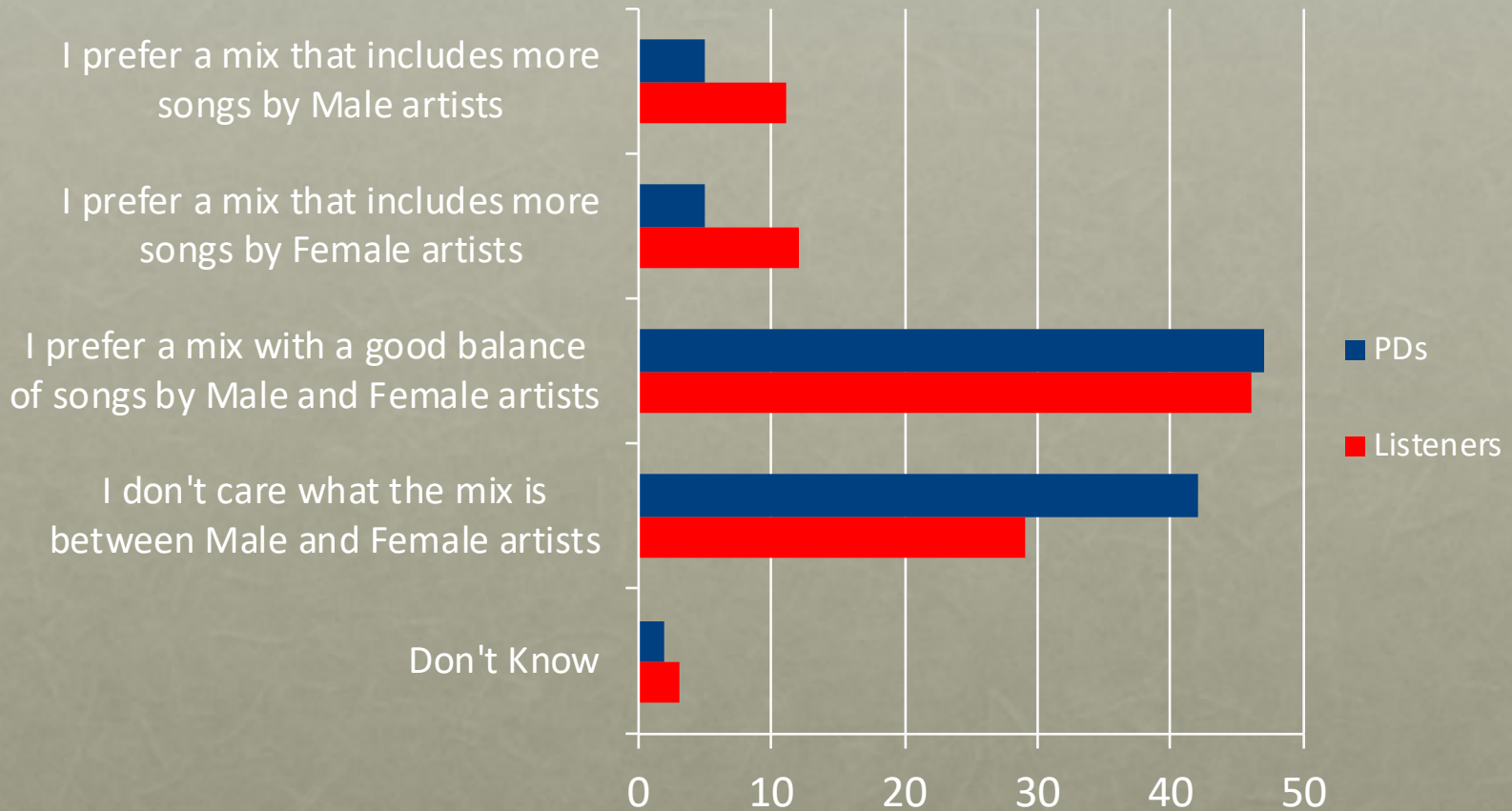
**Want MORE Cross-Format Collaborations, not LESS**



# Gender Balance Preference

When it comes to the mix of songs from male and female artists on your favorite country station, which of these statements best describes your opinion?

# Gender Balance Preference – PD's / Listeners

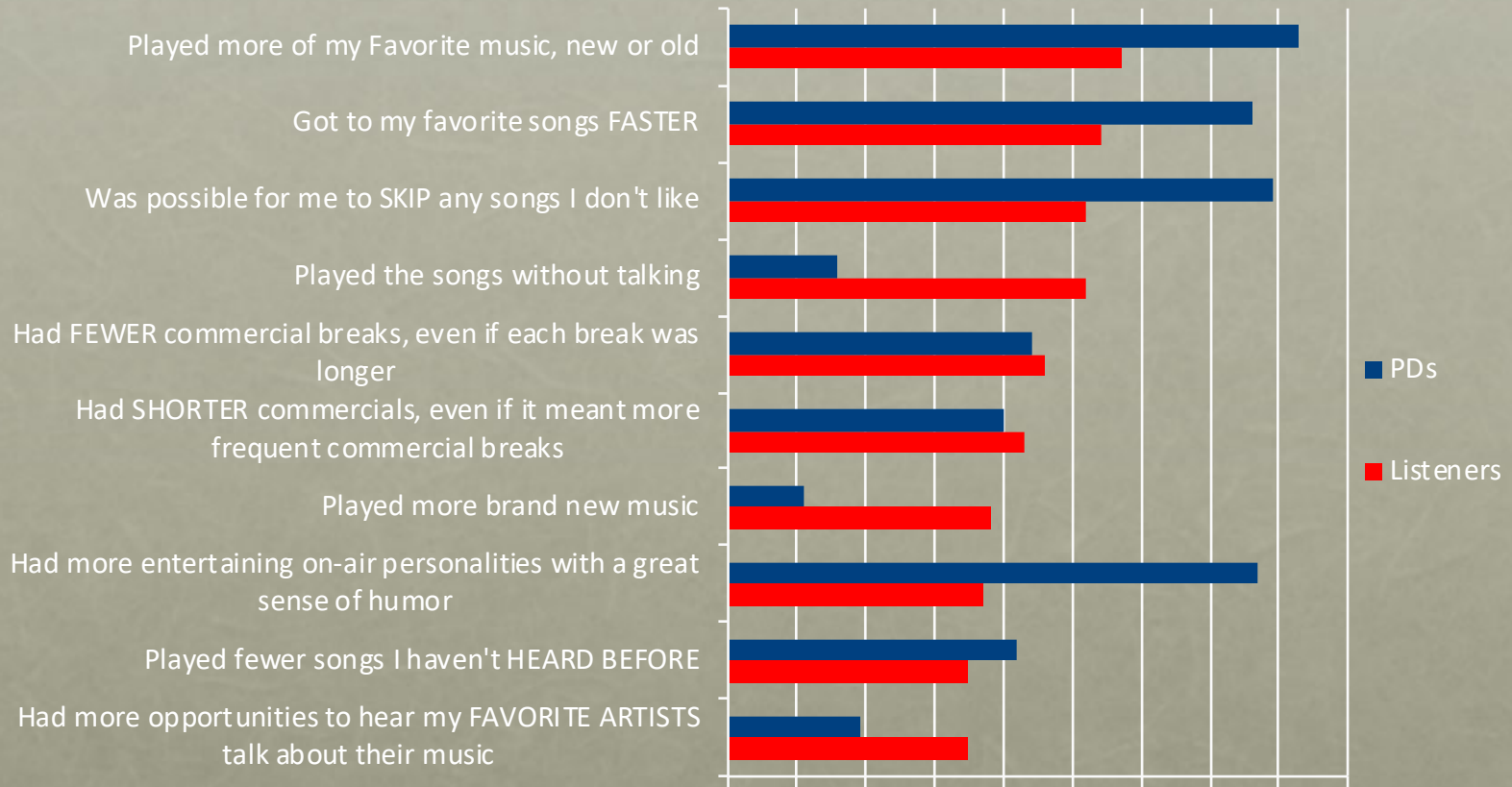


Yes, Listeners Want a “Good Balance”/”I Don’t Care”

# Would Listen **MORE** to Country Station if...

Would you listen **MORE** or **LESS** to your Favorite Country music station, or  
would it make **NO DIFFERENCE** if it...

# Would Listen MORE – PD's / Listeners

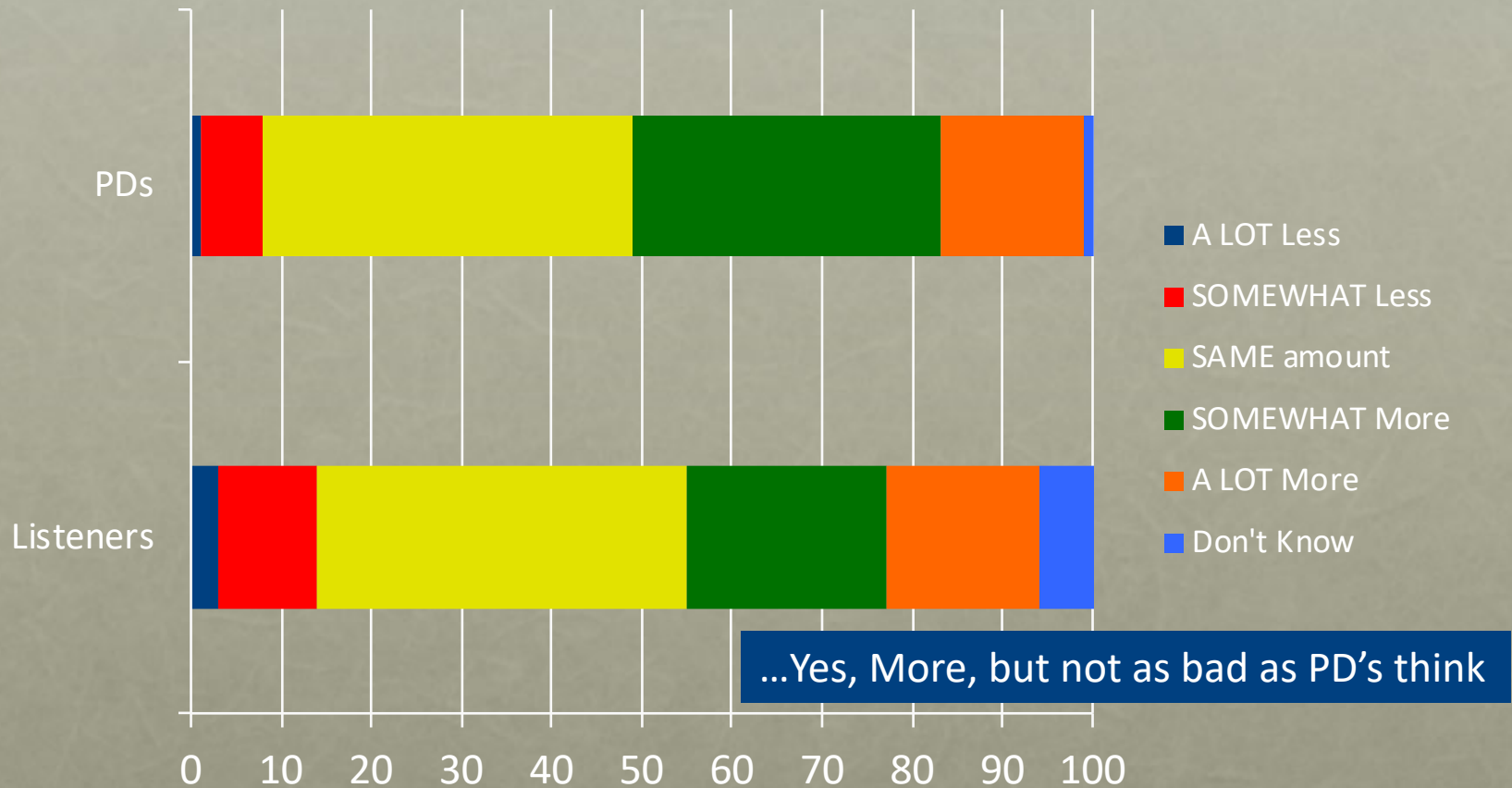


Want MORE “Favorite Music,” “Favorite Songs Faster”, “Skip the ones I don’t like” ...  
More “Songs w/o Talking,” “New Music”  
NOT “More Entertaining Personalities”

# Amount of Commercials on Country Radio

Compared to three years ago, is your Favorite Country Music Station today playing MORE, LESS, or EXACTLY THE SAME AMOUNT of Commercials?

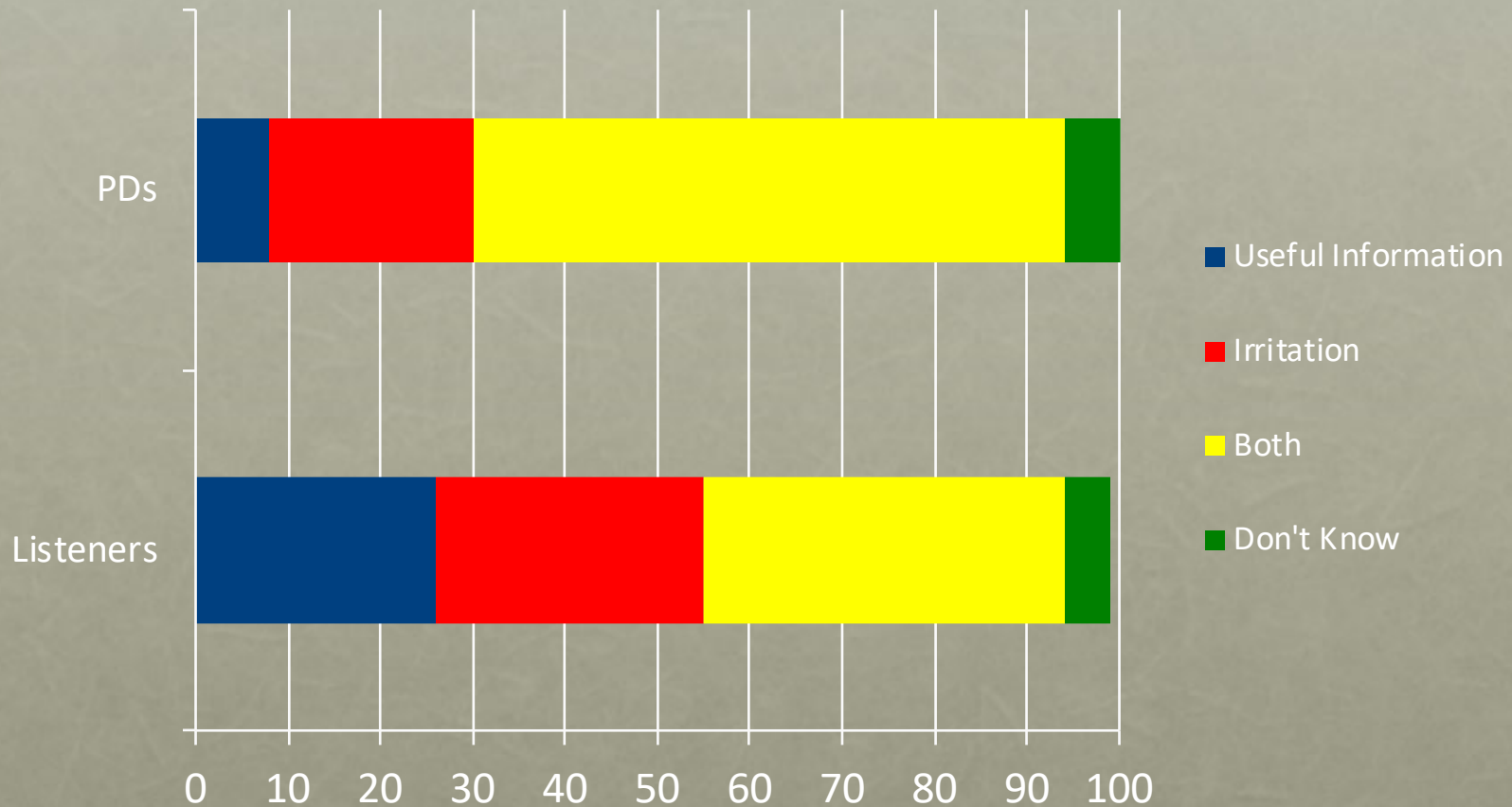
# Commercial Amount – PD's / Listeners



# Your View of Commercials on Country Radio

And when a commercial comes on your favorite Country Music Station, do you usually consider it USEFUL INFORMATION, an IRRITATION, or BOTH?

# Your View of Commercials – PD's / Listeners



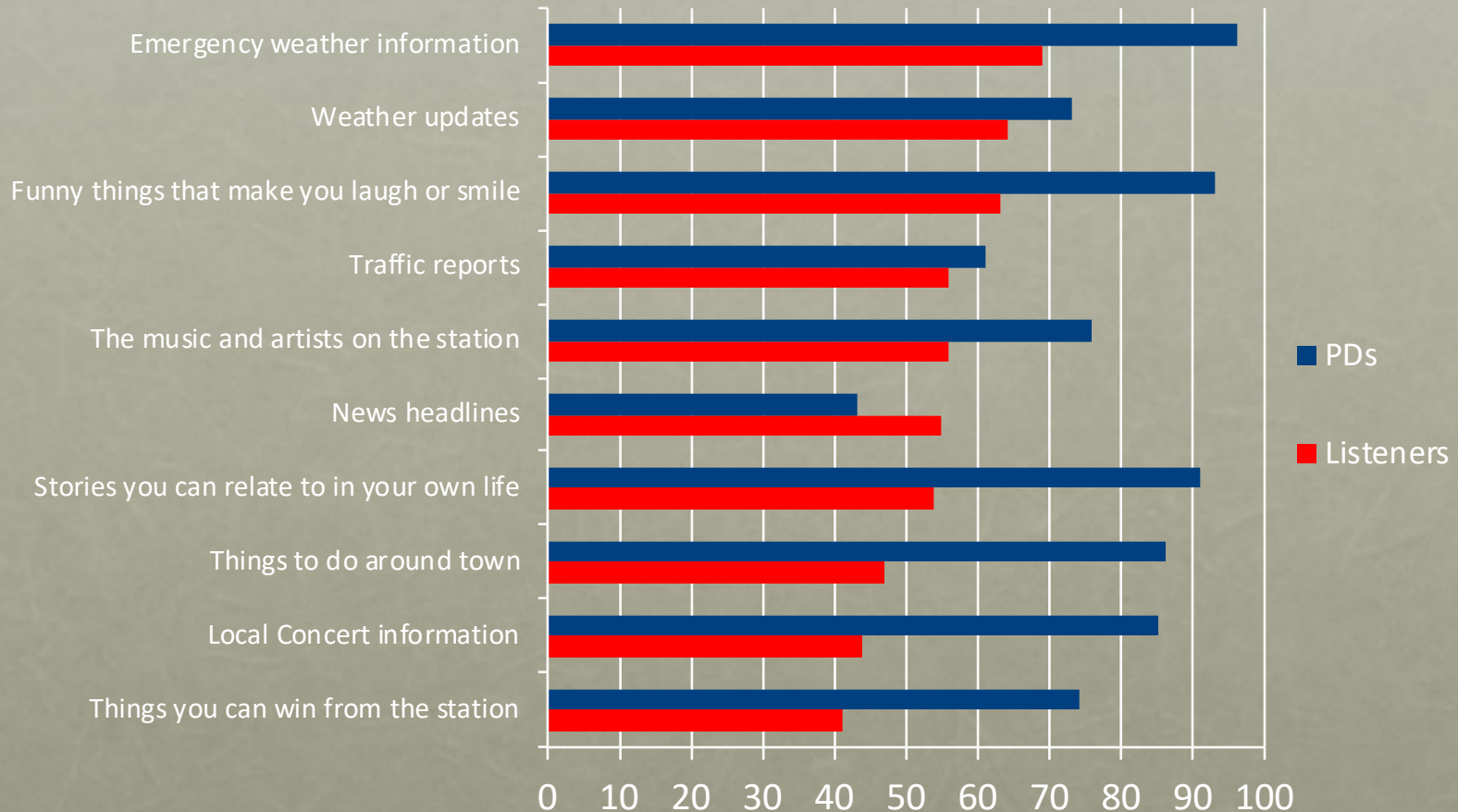
Listeners say: More Irritating AND MORE USEFUL than PD's think



# Listen CLOSER if Personalities Talk About...

Music and personalities are both parts of your Favorite Country Music Station. Overall, would you say you **LISTEN CLOSER**, **TUNE AWAY**, or **PAY NO ATTENTION** when you hear the personalities on your Favorite Country Music Station talk about...

# Listen CLOSER if Personalities Talk About – PD's / Listeners

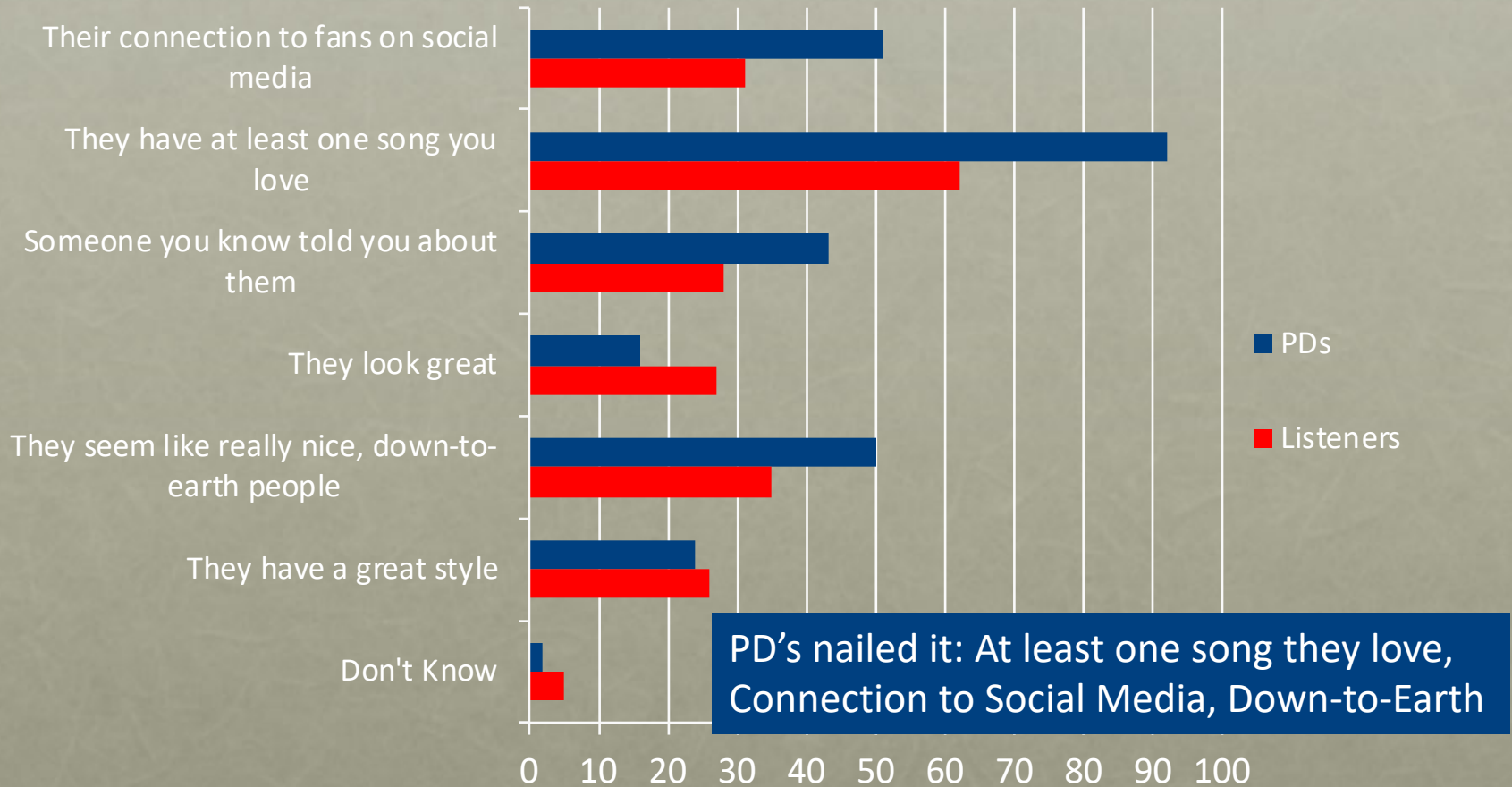


Weather/Emergency info, Funny things, Traffic, Music/Artists, News Headlines

# What Listeners Pay Attention to When They Pick their Favorite New Country Artists

There are a lot of new Country Music artists out there today. Which of the following things do you most pay attention to when you pick your favorite new Country artists?

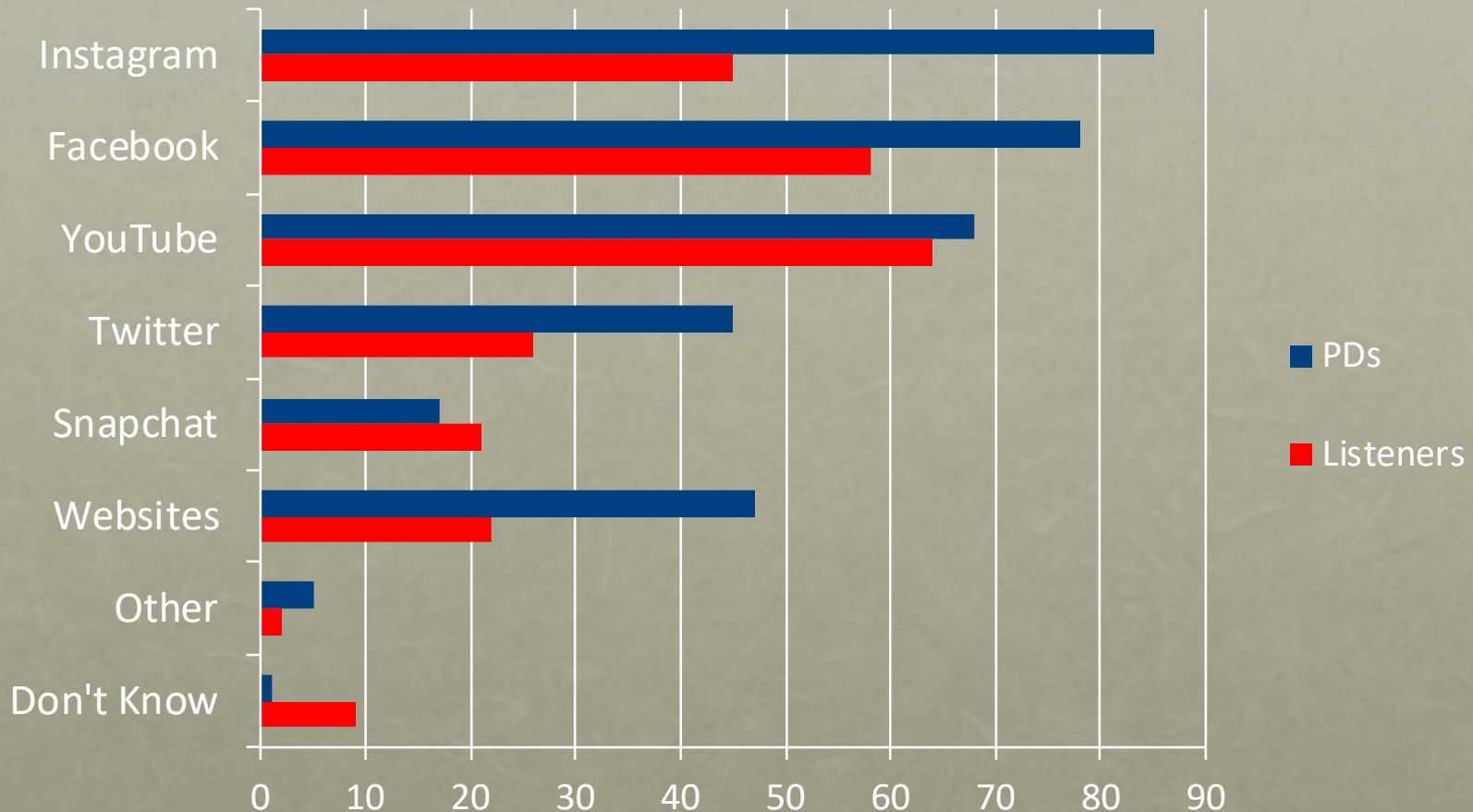
# What Pay Attention to – PD's / Listeners



# Where do you go to Keep Up on your Fav New Country Artists

Which of the following places do you go to keep up on what's new with your favorite Country Music Artists?

# Where do you go to Keep Up – PD's / Listeners



YouTube & Facebook #1; Instagram way ahead of Twitter and Websites; PD's think Twitter/Websites are more important than they are

# Where do you go to Keep Up – Sex/Age

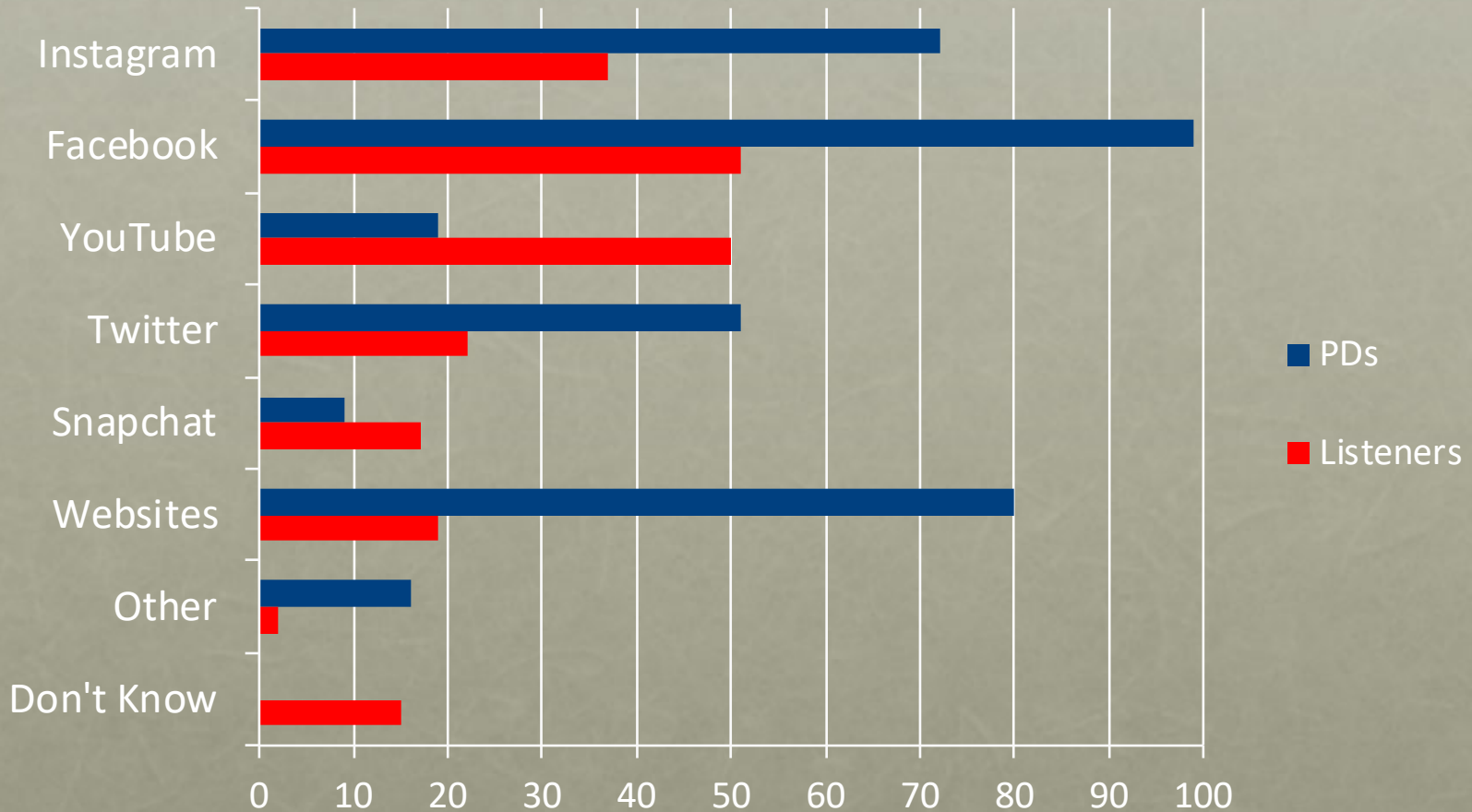
	Sex		Age			
	Women	Men	18-24	25-34	35-44	45-54
N=	480	319	155	232	195	217
Instagram	43	48	64	52	43	26
Facebook	60	57	47	63	68	54
YouTube	58	73	75	69	63	53
Twitter	18	38	27	29	33	16
Snapchat	21	23	38	24	18	10
Websites	18	28	14	19	29	22
Other	2	1	0	0	1	6
Don't Know	9	8	4	3	10	16

# How do you Connect with Your Fav Country Music Station

Which of the following ways have you personally used to connect with your favorite Country Music Radio Station, if any?



# How do You Connect – PD's / Listeners



PD's overstate the importance of Websites and Twitter and understate the importance of YouTube; Facebook and Instagram are also key

# To Do...



# Smartphones

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## FINDING

- Smartphones are becoming the NEW RADIO
- The smartphone, not the smart speaker, is the center of the universe

## TO DO

- What experiences can you create on or through the smartphone which add value to the lives of your consumers?
- Yes, think consumers, not simply “listeners”
- Get beyond simulcasting your over-the-air content or pushing people back to your radio station

# “Radio”

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## FINDING

- “Radio” is no longer the content that comes from the local tower or streams from the local station
- “Radio” increasingly represents whatever platform can give me the music I want, the way I want it, whenever I want it, wherever I want it

## TO DO

- Get beyond the “radio business” per se
- Get into the business of mobile phone experiences and must-join experiences in the real world – the experience business
- You're a publisher, an event planner, an experience maker, a dream-fulfiller, a problem-solver. Not simply a radio station with a digital platform.

# “Convenient and Easy”

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## FINDING

- “Convenient and Easy” used to be the competitive advantage of radio over DSP's, but not anymore
- Smartphones aren't “work” anymore. They're the “new habit.”

## TO DO

- No more resting on radio's laurels. No more coasting on generations of momentum, habit, and convenience
- Plan how to matter to today's and tomorrow's audiences on the platforms they prefer using the tools they favor with the features and functions they demand

# Radio's Competition

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## FINDING

- The competition for “radio” today is any platform, medium, or experience that rewards content with attention – not just other audio platforms

## TO DO

- Your competition is anything that competes for my attention, whether or not it's audio-based
- What are you creating to capture my attention in the real world or on the platforms I prefer?

# The Platforms Country Fans Prefer

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## FINDING

- Country fans are embracing a much more diverse selection of platforms than Program Directors realize.

## TO DO

- Get familiar with all the platforms that matter most to your audience – and be there their way

# Personalities

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## FINDING

- Entertaining Personalities do not score as well as the simple wish for more music without interruptions

## TO DO

- Sure, entertaining personalities can differentiate your content from simple playlists, but they have to be REALLY GREAT. Less-than-great talent will never be a compelling reason to listen.



# “Local”

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## FINDING

- Being “Local” is not a strong reason to listen

## TO DO

- Think less about “local” and more about VALUE
- What are you doing online, on the air, and in the real world that is VALUABLE to your consumers
- Don't obsess on “local” simply because you have an address down the street. Why does that matter to me?

# What Music Fans Want...

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## FINDING

- More music, more variety, more new and old, and fewer interruptions
- In other words, they want more of what they primarily come to you for in the first place

## TO DO

- Take responsible risks and test them before assuming what your consumers will or won't accept
- After all, once upon a time the notion that an AC station would go “All Christmas” in December was laughable.

# Pop Country and Cross-Format Collaborations

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## FINDING

- Country fans are interested in both Pop Country and Cross-Format Collaborations

## TO DO

- Give these a chance on-air
- Showcase/spotlight them
- Recognize that audiences change and so must format strategies
- Remember that a Country artist legitimizes a non-Country artist

# Twitter and Websites

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## FINDING

- PD's think Twitter and Websites are more important to Country fans than they are
- Instead, the emphasis should be on YouTube, Facebook, and Instagram

## TO DO

- Be where your consumers are and give them what they go to those platforms for



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February 2020