

KEY FINDINGS

# DEFENDING Your Country Audience Share

Exclusive Research Findings:  
Country Listeners National Survey Report 2020

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# METHODOLOGY

Participants who identified country music as their favorite music format from a list of 7 options.

1,392 participants from leading consumer panel firm, Qualtrics.

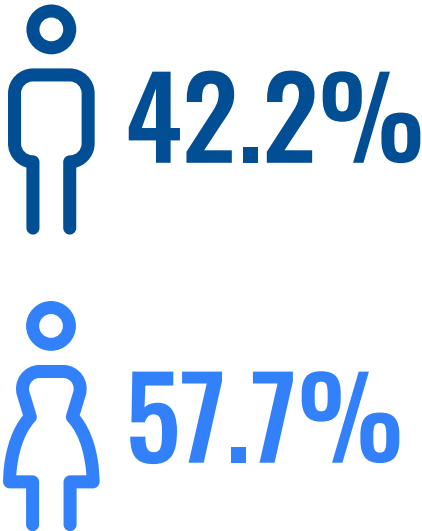
Ability to break out AM/FM country radio listeners and non-AM/FM country radio listeners for broad and discrete demos.

Survey was conducted January 2-17, 2020.

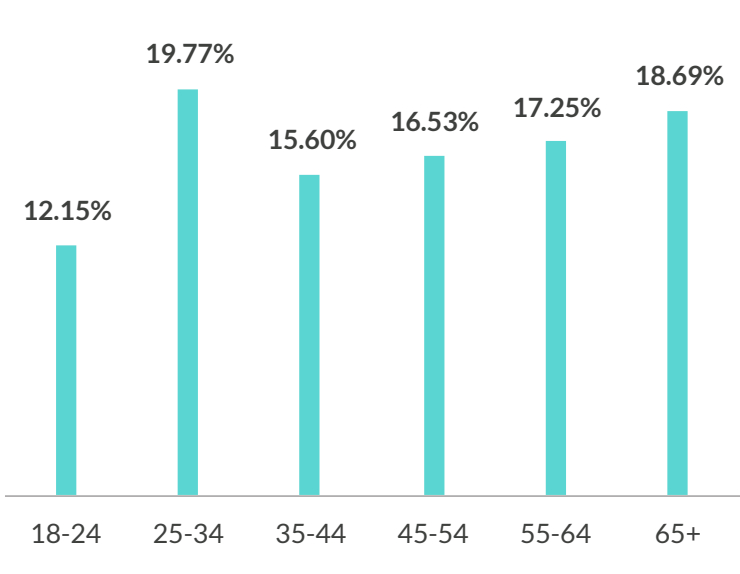
## Our study's sample mirrors the Nielsen country demographic profile.

Sample designed to mirror Nielsen country radio demographic profile (Scarborough USA+, R1 2019).

### GENDER



### AGE



# This study looks into three key questions.

**1** How *can* we **DEFEND** our country audience and revenue share?

**2** How *should* we **EXTEND** our country content onto new platforms?

**3** How *will* we **TRANSCEND** our challenges as the country competition landscape changes?



#1

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# DEFEND

Your Country Audience  
And Revenue Share



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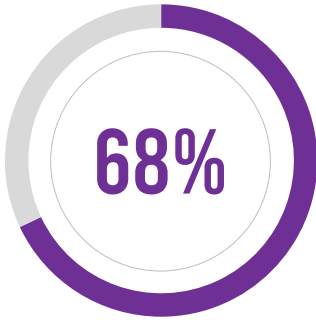
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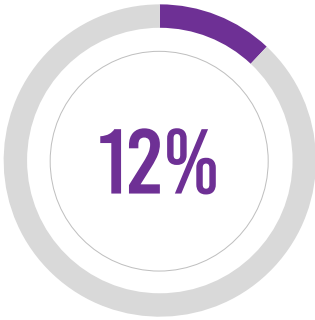
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# DEFEND

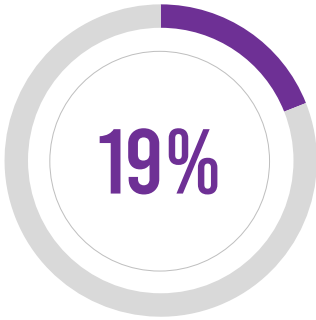
Streaming has positive momentum with country radio listeners  
They're tuning into nearly the same amount of AM/FM radio as in the past, but plan to stream more.



SAME AMOUNT



LISTENED LESS



LISTENED MORE

**23%**

plan to listen to **MORE** country radio streaming in the next 3 months.

Target country fans (especially young females) with a **SOCIAL STRATEGY** that provides sticky and recyclable content.

Percentages who use these nearly every day



18-49 y.o	26%	27%	17%	16%	18%	13%
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18-34 y.o	29%	33%	20%	17%	19%	15%
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# DEFEND

## What's hot with younger female streaming-only country listeners?

**WOMEN 18-34,**  
**Local content, smart speakers**

**WOMEN 25-34**  
**Helping to choose the music**

### MORE important to country listeners A18-49 today



**Artist Access**



**Personalities / Morning Shows**



**Local Content**

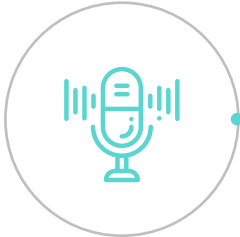
### LESS important to country listeners A18-49 today



**Contests / Prizes**



**Promotions**



**Station Interactions**



**Concerts**



#2

EXTEND

Your Content Onto  
New Platforms



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# EXTEND

When it comes to country music/lifestyle related content:

Young women who are broadcast listeners of country are **more active** on social media than streaming listeners.

## 18-34, Female

■ AM/FM Station Listeners Station Content

■ Non AM/FM Station Listeners Country News/Artist Content

### Sharing

18%

11%

### Commenting

19%

8%

### Liking

34%

33%

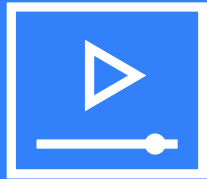
### Tagging

8%

6%



# EXTEND



**VIDEO** is a key strategy to extend your brand.

**76%**

Of AM/FM country radio listeners would prefer **MORE** video content from their favorite country radio station. This % is similar for **ALL** demos.

**1 out of 4** country listeners have used YouTube **more** in the last 90 days.

Quality **station-specific apps** present a major engagement opportunity. Younger listeners are more likely to install them, and they're an opportunity for more connected car listening.

**44%**

of AM/FM country radio listeners have their favorite station's app installed on their mobile device.

**48%**

of **18-34** AM/FM country listeners have their favorite station's app installed on their mobile device.

**26%**

of country fans listen to country music via a connected car platform, such as **Apple CarPlay**, and are **HIGHLY** likely to listen to country music connecting their mobile device to their vehicle.

#3

# TRANSCEND

Your Challenges As The  
Competition Landscape  
Changes

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# TRANSCEND

## Younger country listeners listen to more podcasts

Of all country fans listened to a podcast in the past month.

36%

47%

Of 18-49 country fans listened to a podcast in the past month.

## And younger country listeners listen to podcasts *frequently*.

Listen to podcasts multiple times a week

28%

21%

Listen to podcasts daily

## Country listeners want to listen to podcasts that *talk about music*.

Of country fans who have listened to a podcast in the past month name music as their favorite podcast topic genre.

30%

11%

Listened to news/politics as next favorite genre.

## Radio leads to search, which leads to shopping, which leads to buying!

56%

Of AM/FM country radio listeners have searched online after hearing the sponsored message over the air. This applies to all demos, not just young women.

When the call to action is search, country listeners are responding!



TopLine by Futuri has several more insights into the buying habits of country listeners. Want the full presentation and demo? Reach out to [partner@futurimedia.com](mailto:partner@futurimedia.com).

The key findings are highlights from this wide-ranging study from Futuri Media and the University of Florida College of Journalism and Communications. For the full presentation, please reach out to [partner@futurimedia.com](mailto:partner@futurimedia.com).

## Your Country Listener Checklist

### DEFEND

- Target country fans with a SOCIAL STRATEGY that provides sticky and recyclable content, especially for younger and female listeners.
- Local is still valuable for Women 18-34, but voice and smart speakers and “choose the music” strategies are also important.

### EXTEND

- Beyond reach, younger women are engaged and influencing. They are DRIVING the social conversation.
- AM/FM country listeners want MORE video from your station.
- Having a mobile strategy is important for your brand, beyond just streaming.

### TRANSCEND

- Having an on-demand, podcasting, audiogram strategy is essential.
- These strategies and brand extensions can be monetized by targeting a loyal, passionate, social country audience that responds to your brand message.

Futuri Media has a proven track record of helping brands like yours achieve meaningful growth. We'll drive **better focus** to grow your revenues, deliver **bigger results** that grow your ratings, and build **brighter futures** through our digital solutions.