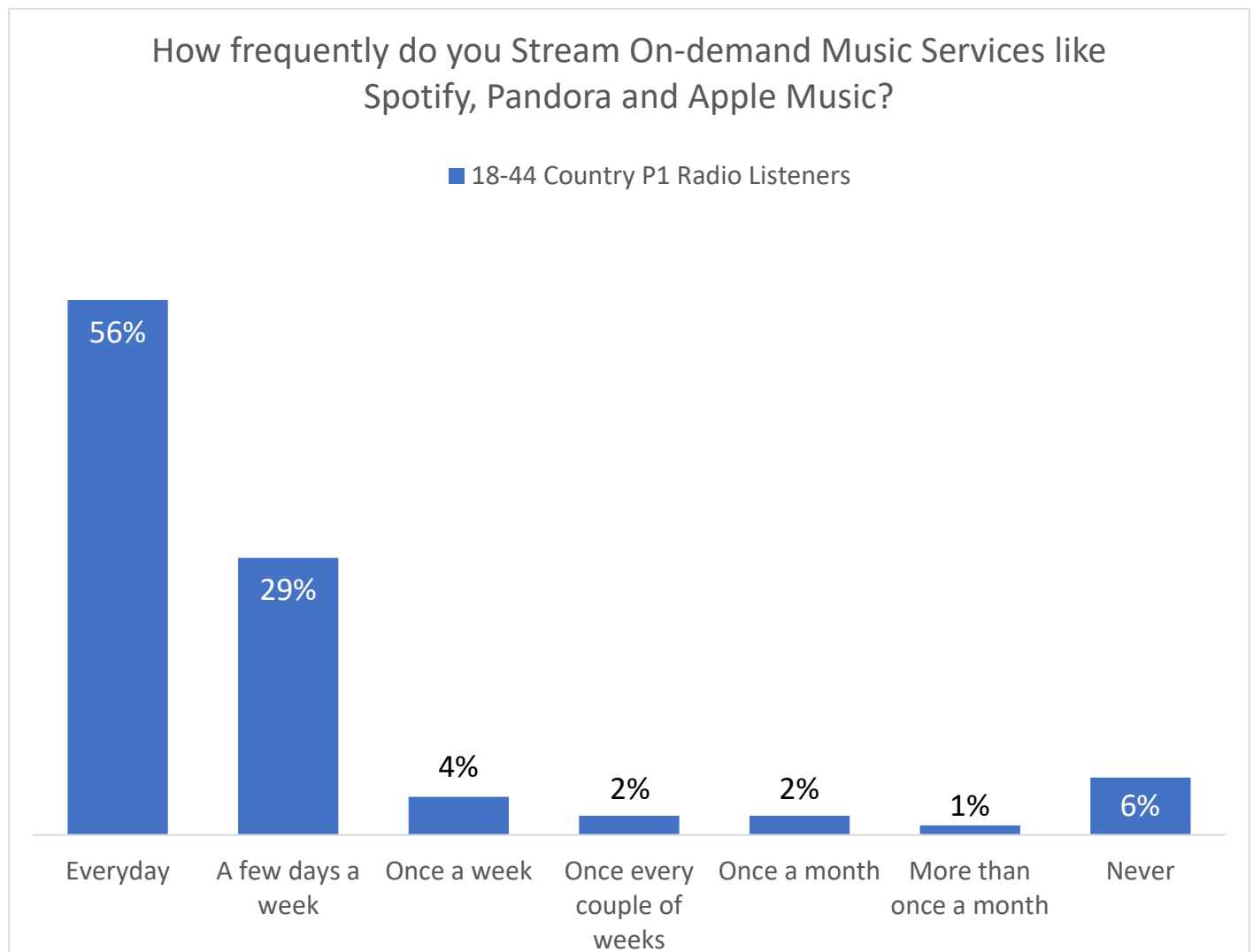


# WHAT COUNTRY RADIO PROGRAMMERS NEED TO KNOW ABOUT COUNTRY MUSIC STREAMING

## COUNTRY RADIO LISTENERS ARE STREAMING

Streaming to Country music grew 36% in the United States from 2018 to 2019 according to **MRC Data / Nielsen Music** and 54% of American Country Radio P1 listeners report streaming every day to a service like Pandora, Spotify or Apple Music.



“If you are programming a Country radio station today, the streaming audience is impossible to ignore with more than half of Country radio listeners between the ages of 18 to 44 reporting streaming music via an on-demand music services every day” **Ken Benson, co-founder, P1 Media Group**. With so many Country radio listeners using on-demand streaming services, we examined the differences between what radio is playing versus listener choices using on-demand audio streaming services.

“As a proponent of using streaming data to help make programming decisions, I’m excited to see real research showing the correlation between radio listeners and on-demand streaming users” said **Haley Jones, from MRC Data / Nielsen Music**.

## COUNTRY BY ERA

Working with MRC Data / Nielsen Music, we examined the top 100 and top 500 most-played Country songs versus the top 500 on-demand audio Country tracks from 2019.

Top 500 of 2019 by Era		
Era	Country Airplay	On-demand Audio
2019	10%	12%
2018	14%	16%
2015-17	25%	30%
2010-14	25%	19%
2005-09	10%	9%
2000-04	7%	5%
1990-99	8%	6%
1980-89	1%	2%
1950-70s	0	1%
<b>Avg Year Top 500</b>	<b>2012.1</b>	<b>2011.8</b>

Broadly reviewing the Top 500 songs on each medium, the on-demand streaming chart is more contemporary with 58% of its Top 500 most-played songs from the past five years, 2015 to 2019, versus 49% for the most-played songs on radio. However, when we review the eras of the songs in Top 100, the opposite is true.

Top 100 of 2019 by Era		
Era	Airplay	Streamed
2019	26%	18%
2018	44%	37%
2015-17	27%	36%
2010-14	1%	5%
2005-09	2%	3%
2000-04	0%	0%
1990-99	0%	0%
1980-89	0%	0%
1950-70s	0%	1%
<b>Avg Year Top 100</b>	<b>2017.7</b>	<b>2016.5</b>

Of the top 100 most-played Country songs on radio, 70% were from 2018 and 2019 versus 55% of those on the on-demand Audio Streaming chart. The average era of the top 100 radio songs was over a year newer than the on-demand Country songs. Furthermore, the Top 100 on-demand audio songs feature more unique artists, 58 unique artists versus 50 unique artists on the Top 100 most-played Country songs on radio. Comparing the Top 100 songs, 69 songs appear in the Top 100 on both charts, **31 songs are different.**

The assumption many may make is younger people stream more, which is true in our study of Country radio listeners. 70% of 18-24-year old's report streaming on-demand services such as Spotify, Amazon or Apple Music everyday versus 57% for 25-34s and 51% of 35-44s. Indeed, younger Country radio fans stream on-

demand audio more frequently than older fans, yet the average era of the Top 100 Country on-demand streaming songs is more than a year older than radio's Top 100.

## COUNTRY RADIO PLAYS FEWER SONGS MORE OFTEN

Country radio listeners may be open to more variety. Looking at the Top 500 most-played songs on Country radio, 62% of the total spins come from the Top 100 songs versus only 46% for on-demand streaming.

## RADIO IS PLAYING MORE OF THE LABEL GAME



According to the MRC Data/Nielsen Music Year End 2019 report Luke Combs had the number one Song, Album and was the #1 overall Country Artist.

The Top 4 songs for 2019 were the same on both charts.

1. Luke Combs – Beautiful Crazy
2. Dan + Shay – Speechless
3. Morgan Wallen – Whiskey Glasses
4. Dan + Shay = Tequila

However, the core artists within the Country genre, defined by how many unique songs an artist has in the Top 500, varies considerably between Radio Airplay and On-demand Audio.

## Total number of unique songs by Artists in Top 500 Airplay vs Total On-demand

Artist	Airplay	On-demand
Luke Combs	7	24
Luke Bryan	25	18
Jason Aldean	20	16
Thomas Rhett	14	16
Blake Shelton	17	14
Kenny Chesney	18	12
Tim McGraw	9	11
Dan + Shay	14	10
Kane Brown	15	10
Zac Brown Band	11	10

Luke Combs, Country's 2019 superstar, had 24 unique songs on the Top 500 on-demand chart versus only 7 on the Radio Airplay chart. Reviewing the remainder of the Top 10 Artists, radio relies more on Core Artists than on-demand Audio users. Radio plays more songs from seven of the Top 10 Country Artists versus the on-demand users.

# COUNTRY RADIO MISSED “OLD TOWN ROAD”



Lil Nas X’s “Old Town Road” was 2019’s most consumed song with over 2.5 billion streams and is the new record holder for most weeks spent at number one with 19 weeks at #1 on the Billboard Hot 100. Despite these record stats and the popular remix featuring Country artist Billy Rae Cyrus, Country Radio disregarded the immense popularity of “Old Town Road.” This #1 song did not appear on the Top 500 Country airplay chart for 2019.

Did Country radio miss this big multi-format hit? 56% of Country Radio P1s and 63% of every day on-demand audio streamers answered “yes, my favorite Country station should play that song.” 61% of Country Radio P1s and 66% of on-demand audio streamers told us they expect to hear “Old Town Road” on their favorite Country station. Perhaps surprisingly, 35-44 were mostly like to say their favorite Country station should play the song and they expect to hear it on their favorite Country station.

## KEY FINDINGS

- Streaming to Country Music grew by 36% from 2018 to 2019.
- 85% of Country Radio P1s between the ages of 18 to 44 report streaming to an on-demand audio service either “every day” or “a few days a week.”
- Radio is playing more contemporary music than on-demand Streaming services. 70% of radio’s Top 100 most-played songs are from 2018 and 2019 versus only 55% of songs from on-demand streaming services.
- Radio relies more on Core Artists playing more songs from fewer artists while on-demand streaming services play more unique artists.

- Radio plays less variety than the on-demand streaming services. Of the Top 500 songs on Country radio, 62% of the total spins come from the Top 100 songs versus 46% for on-demand streaming.
- The responses from Country Radio P1 listeners indicates that Country stations either missed or underplayed the biggest hit of 2019 “Old Town Road.”

## ABOUT THE STUDY

P1 Media Group based its findings on MRC Data/Nielsen Music Top 500 most-played Country songs according to the US Country Radio Panel and the Top 500 most-played Country songs from the On-demand Audio Panel for the 2019 calendar year. An On-demand audio stream includes plays on audio only services such as Spotify, Amazon and Apple Music.

P1 Media Group also conducted an online survey in January 2019 to obtain supplemental audience data from fans of US Country radio. We sampled 400 18-44-year-old radio listeners, proportional to the population of the Top 25 largest audio streaming markets. Participants were required to listen to music on radio a minimum of two to three hours per week, listen to a local Country radio station and rate a Mainstream Country format montage a ‘7’ or higher on a 1 to 10 scale. We identified heavy streamers by asking each respondent “How frequently you listen to music on your smartphone, computer or other listening device from a streaming service such as Pandora, Spotify or Apple Music.”

## ABOUT P1 MEDIA GROUP

With experience and passion, we’re shaping the future of radio. We offer the power of a large consultancy, and the understanding, empathy, and honesty of a small one, with a customized approach to help stations grow and engage with their fans.

## ABOUT MRC DATA/NIELSEN MUSIC

Better known as **BDS**, is a service that tracks monitored radio, television and internet airplay of songs based on the number of spins and detections.

## CONTACT

Ken Benson, partner & co-founder, P1 Media Group LLC

[ken@p1mediagroup.com](mailto:ken@p1mediagroup.com)

+13609104110

Haley Jones, MRC Data/Nielsen Music

[Haley.jones@nielsen.com](mailto:Haley.jones@nielsen.com)

+14152446623

