

edison media research



edison media research

Presents:



edison media research

"A Statistician Looks At Country"



Today's Goal:

Provoke ideas for
restoring positive
momentum to
Country Radio

Research data collected:

- Arbitron data
- Country record sales from SoundScan
- *Radio & Records* chart summaries
- Music Testing summaries
- Edison Media Research telephone survey of 611 Country listeners age 25-54 in six markets

Markets Surveyed:

Houston, TX

Phoenix, AZ

Greenville, SC

Charlotte, NC

Dayton, OH

Rochester, NY

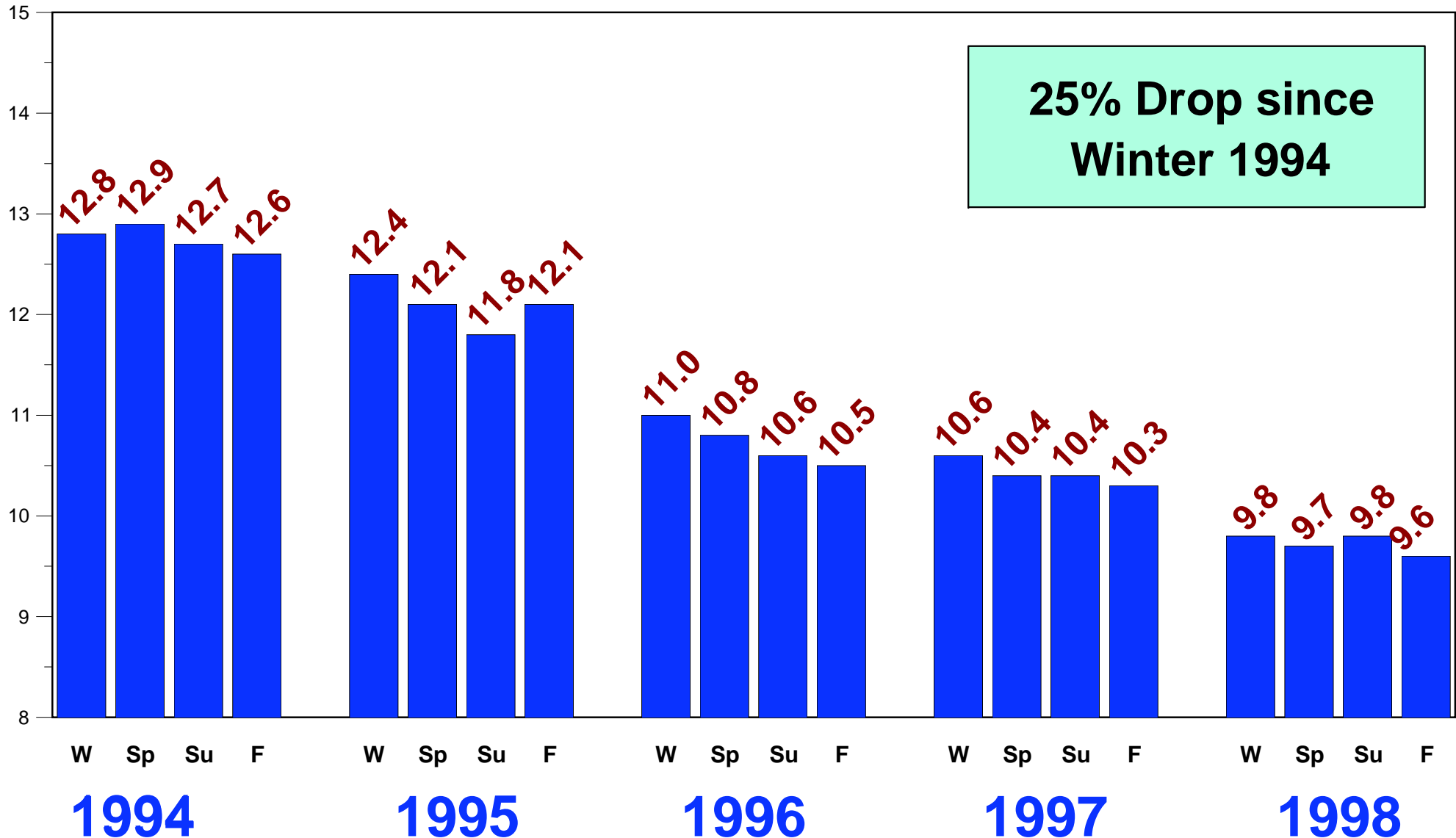
We paired these markets because...

- Each pair is from the same region
- Each pair is from the same size market
- Each pair of markets has the same number of Country stations
- One market in each pair saw Country shares drop and one market had steady Country shares

Point One:

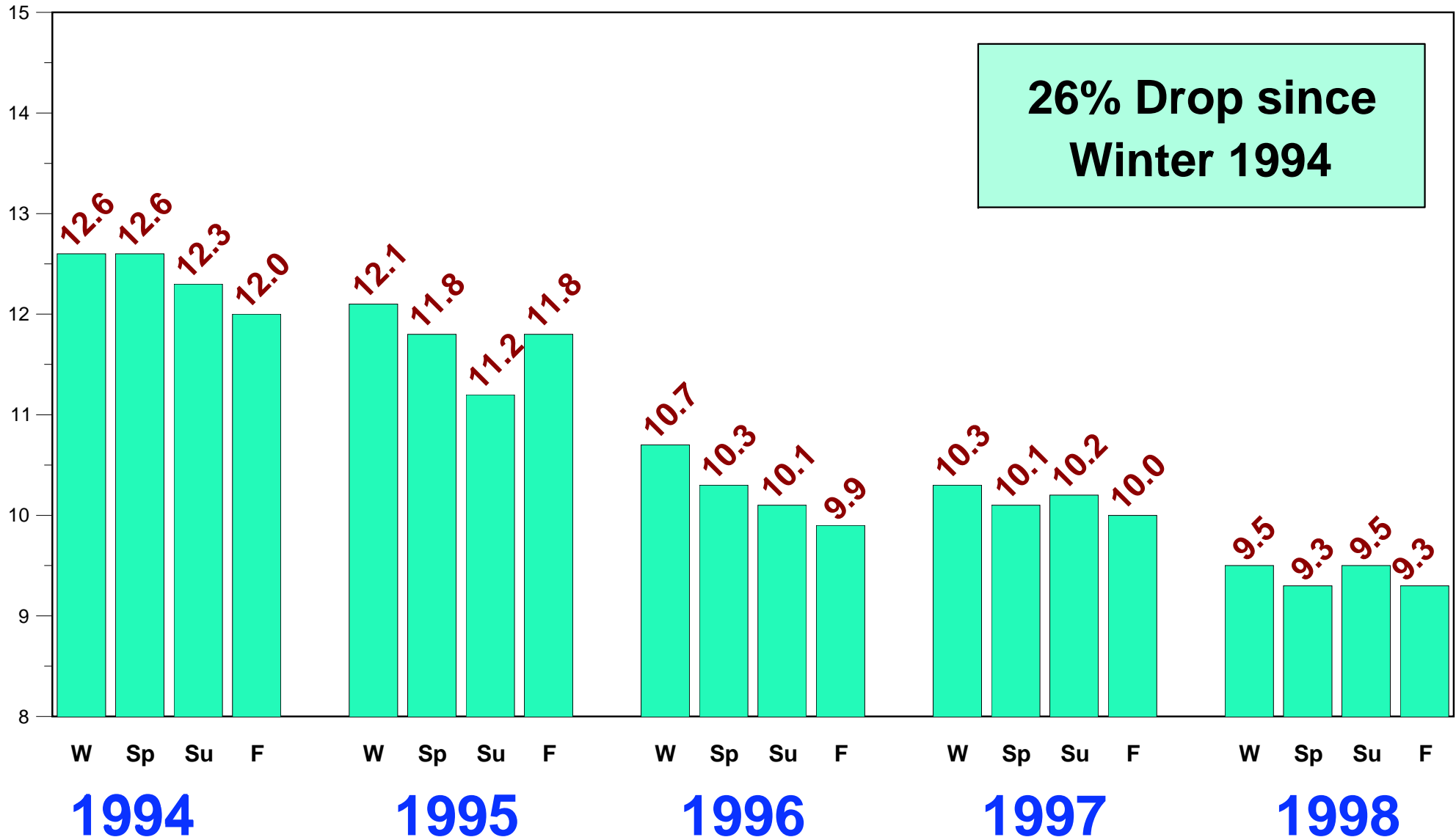
Country Radio
is down

Arbitron Country Radio shares: National 12+

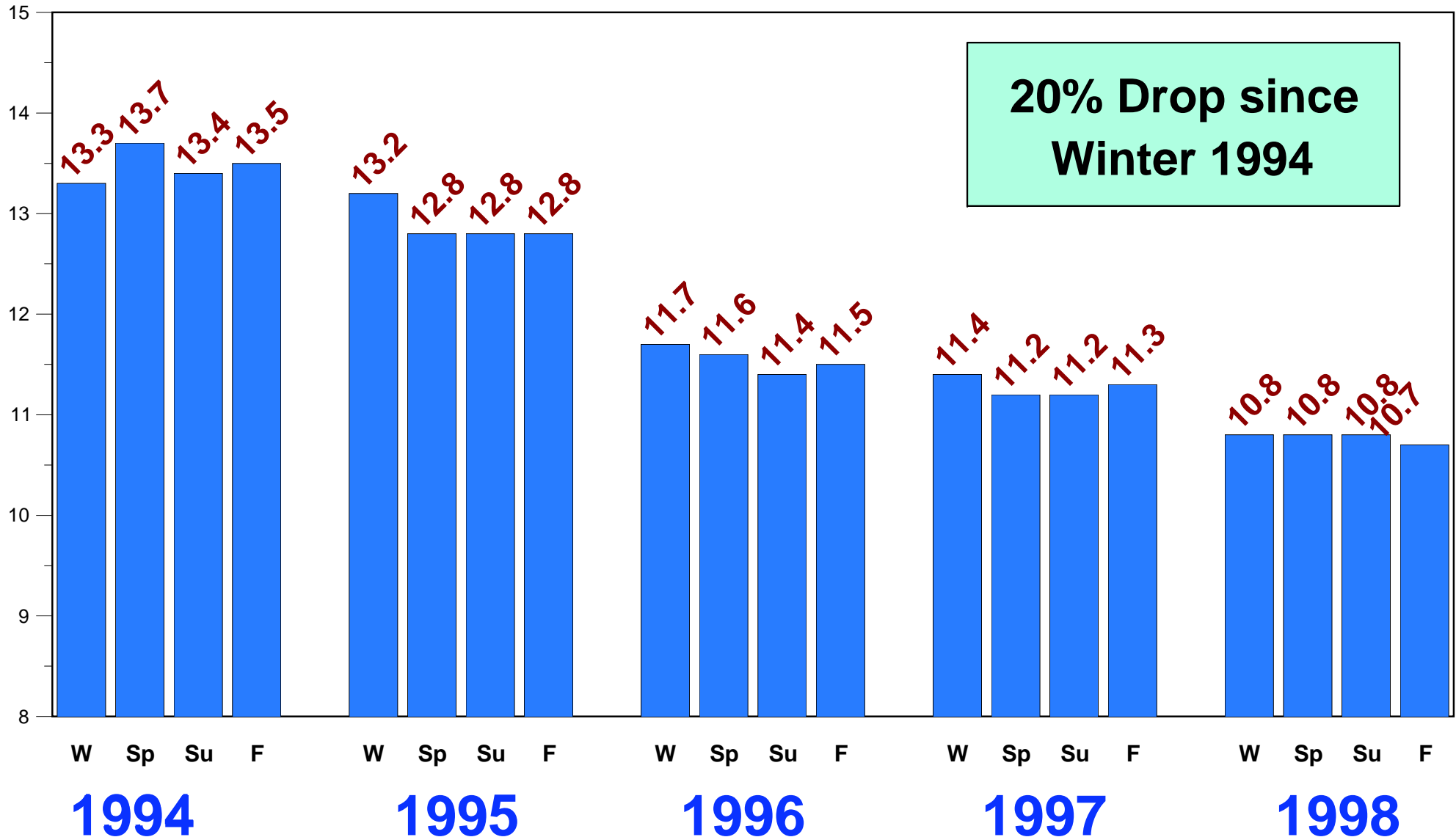


Source: Arbitron

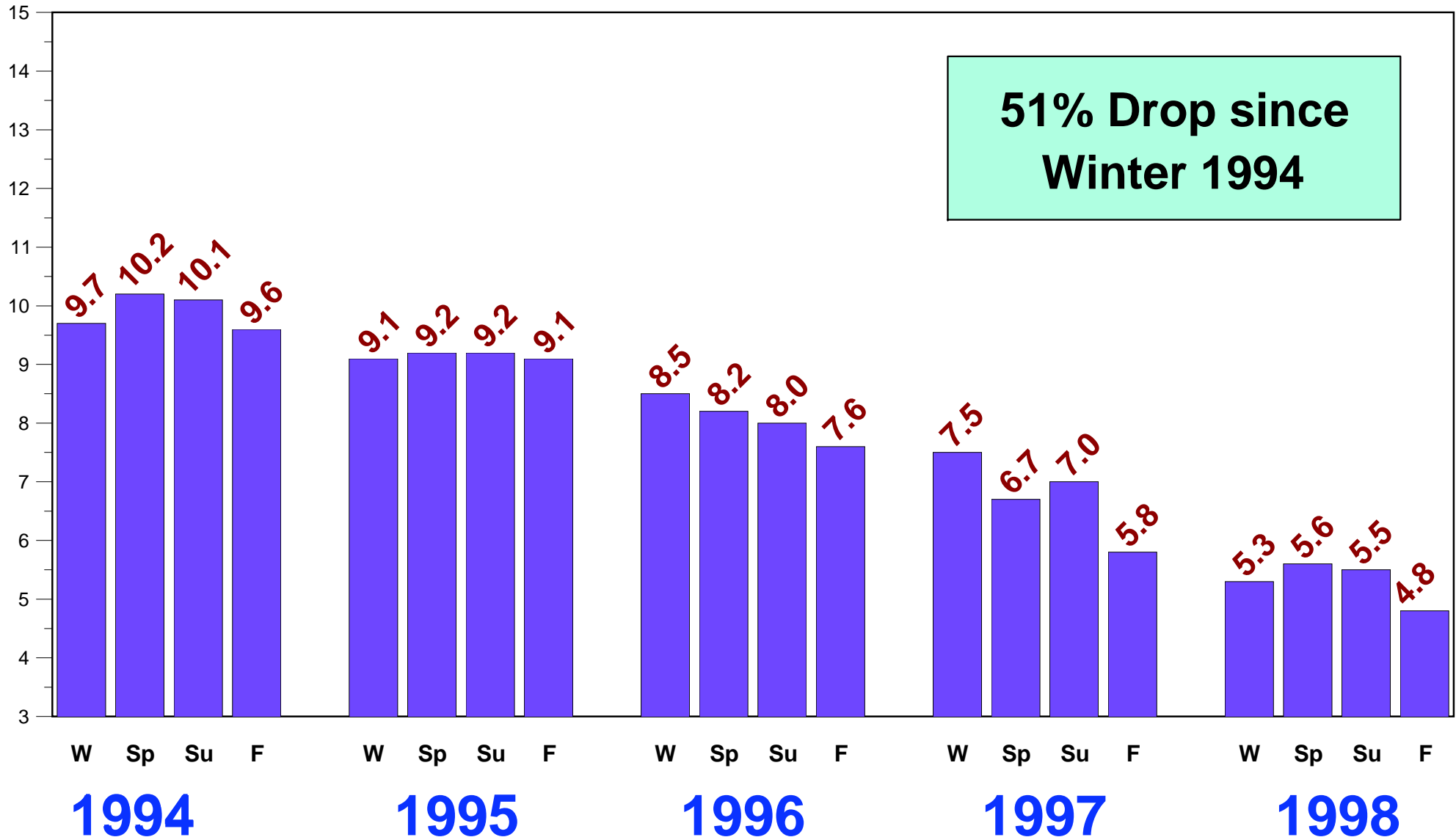
Arbitron Country Radio shares: Men 18+



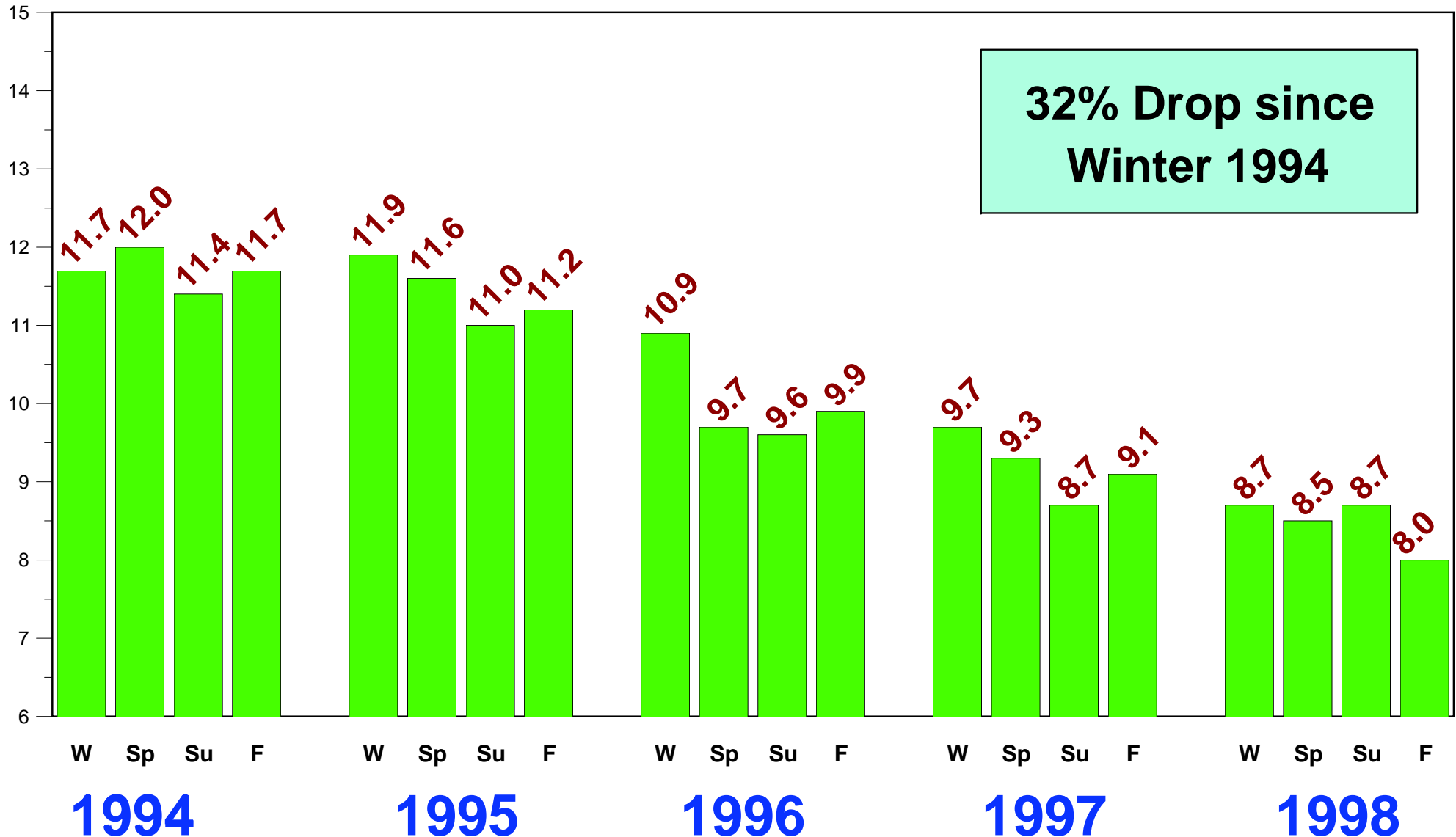
Arbitron Country Radio shares: Women 18+



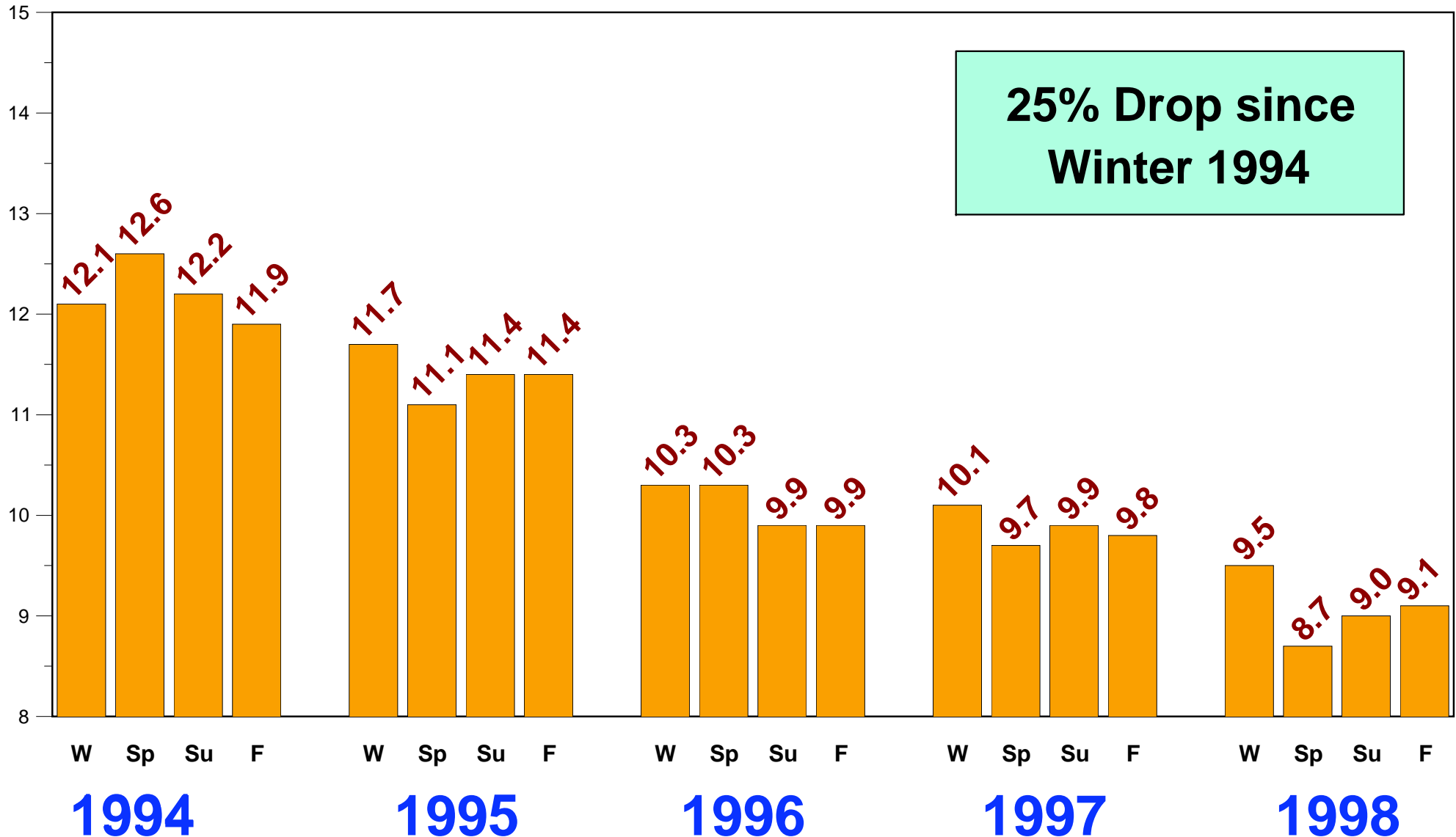
Arbitron Country Radio shares: Teens 12-17



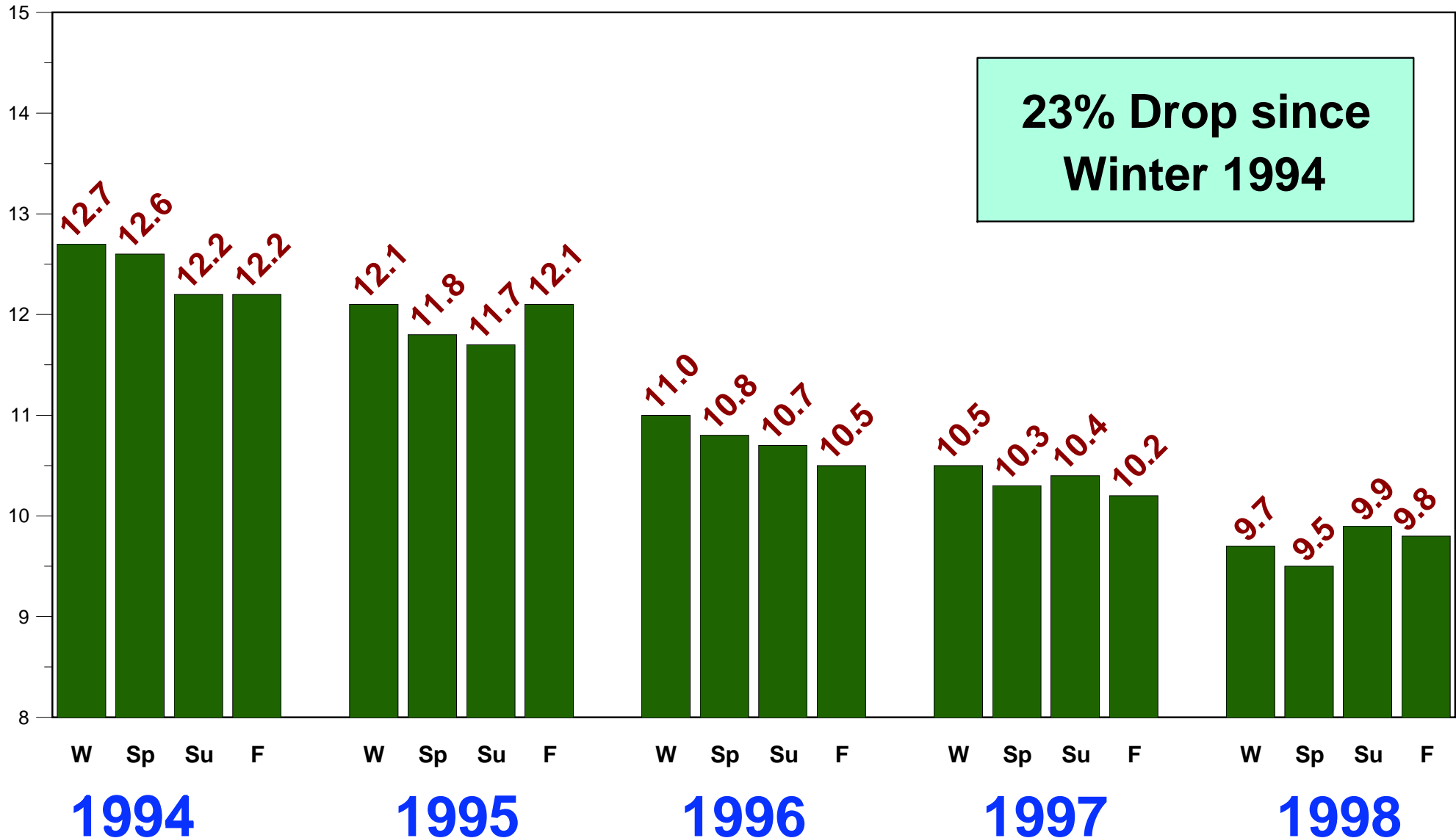
Arbitron Country Radio shares: Adults 18-24



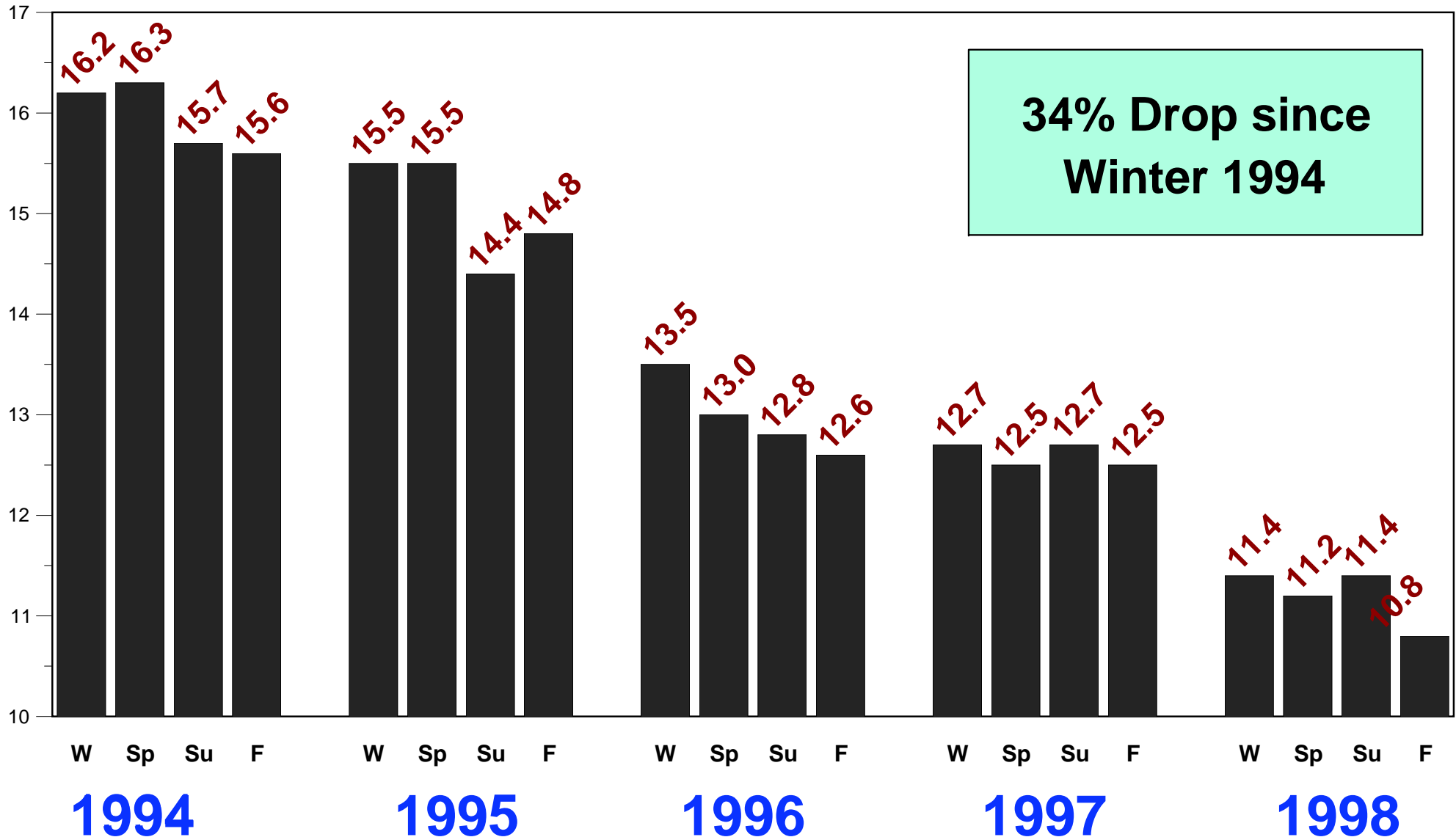
Arbitron Country Radio shares: Adults 25-34



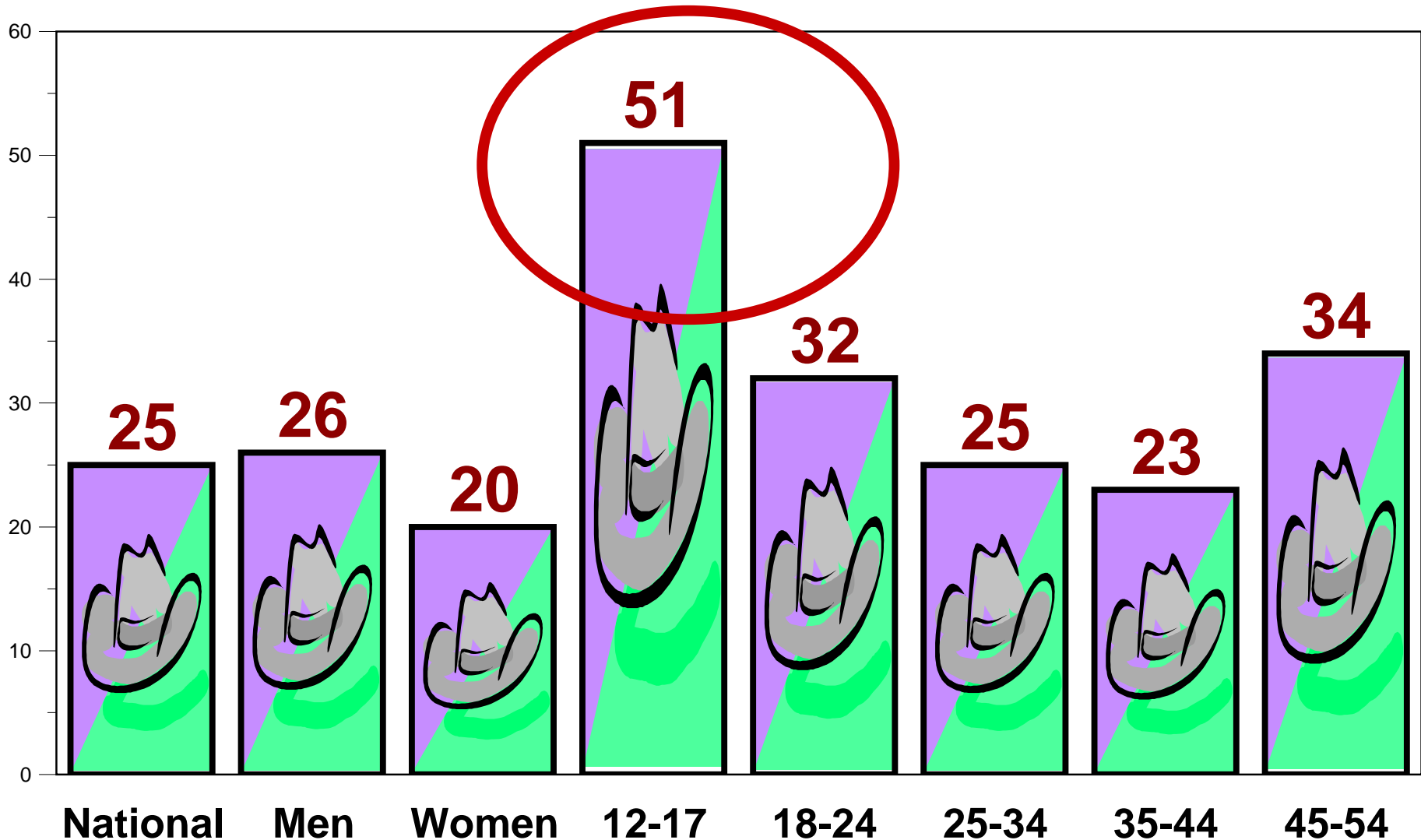
Arbitron Country Radio shares: Adults 35-44



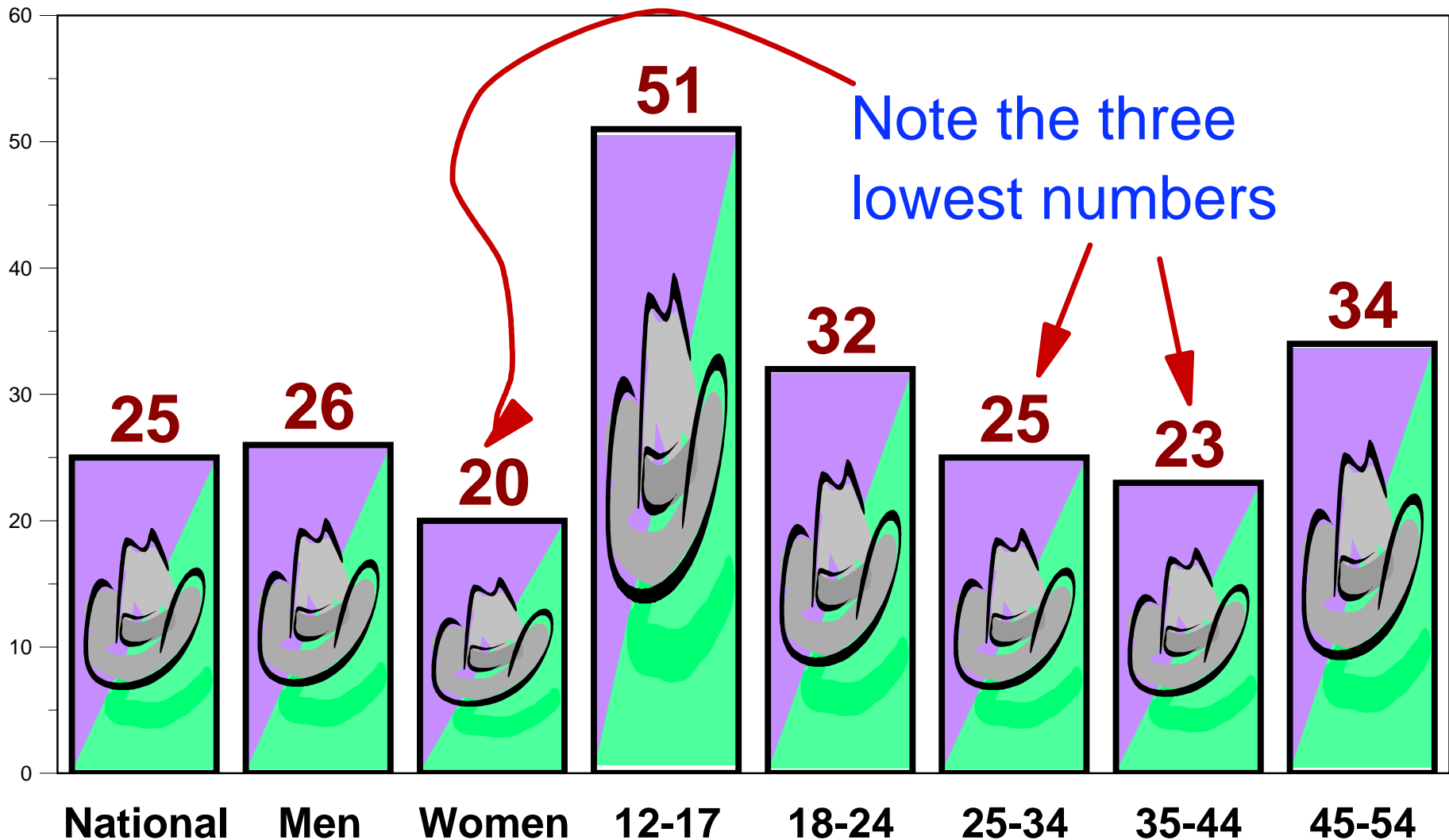
Arbitron Country Radio shares: Adults 45-54



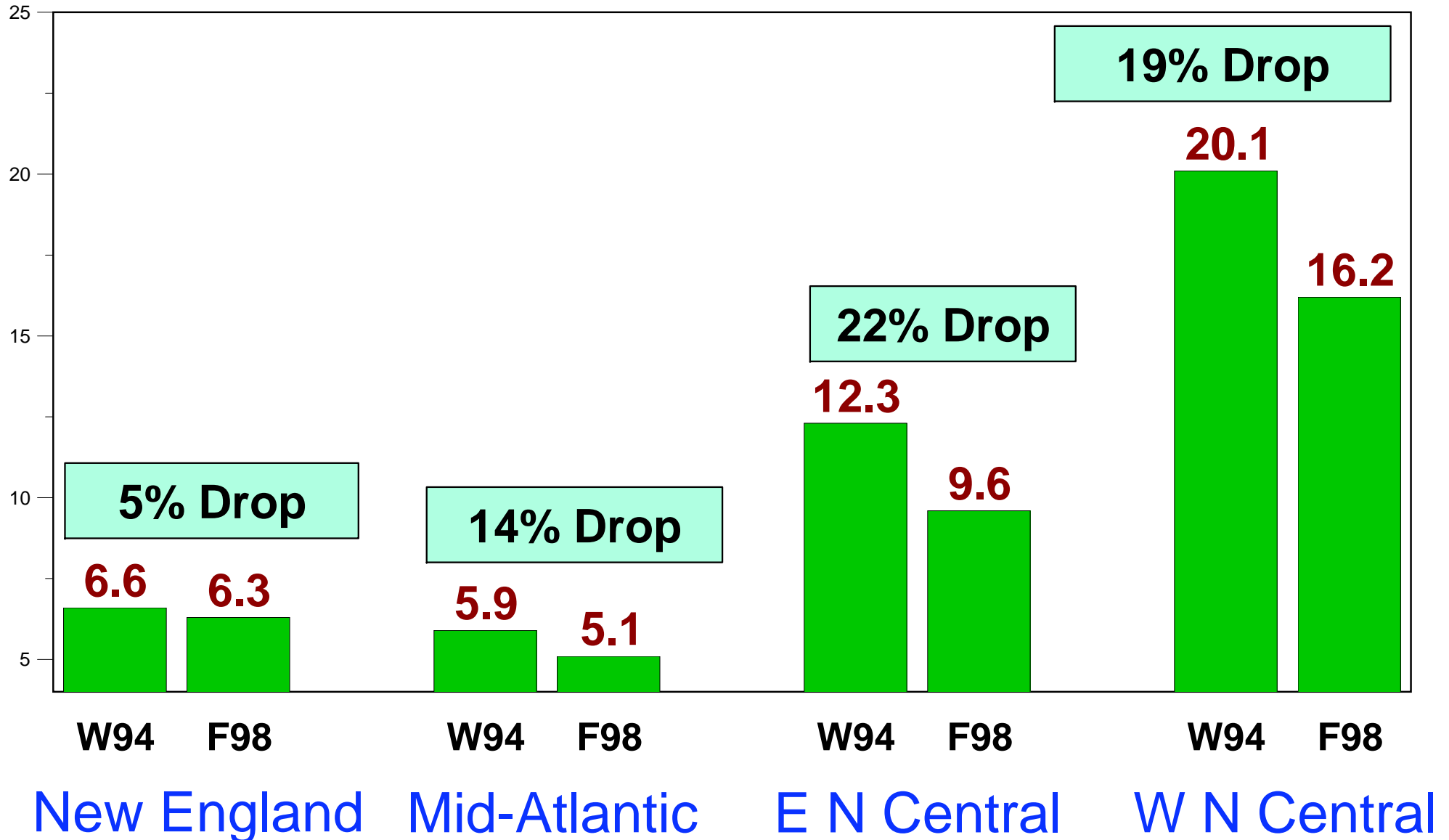
Drop in Country Radio shares since Winter 1994



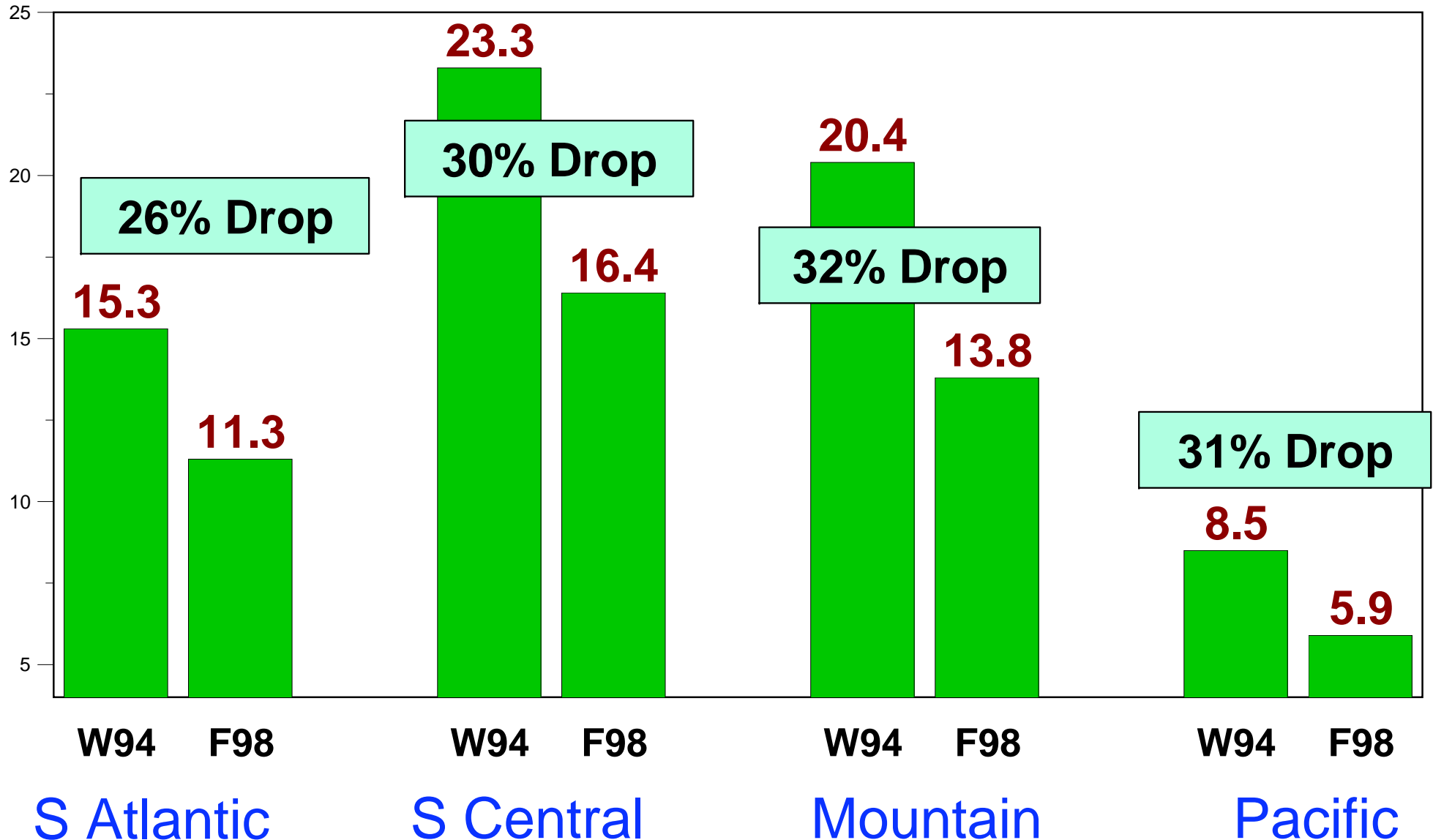
Drop in Country Radio shares since Winter 1994



Arbitron Country Radio shares: By Region



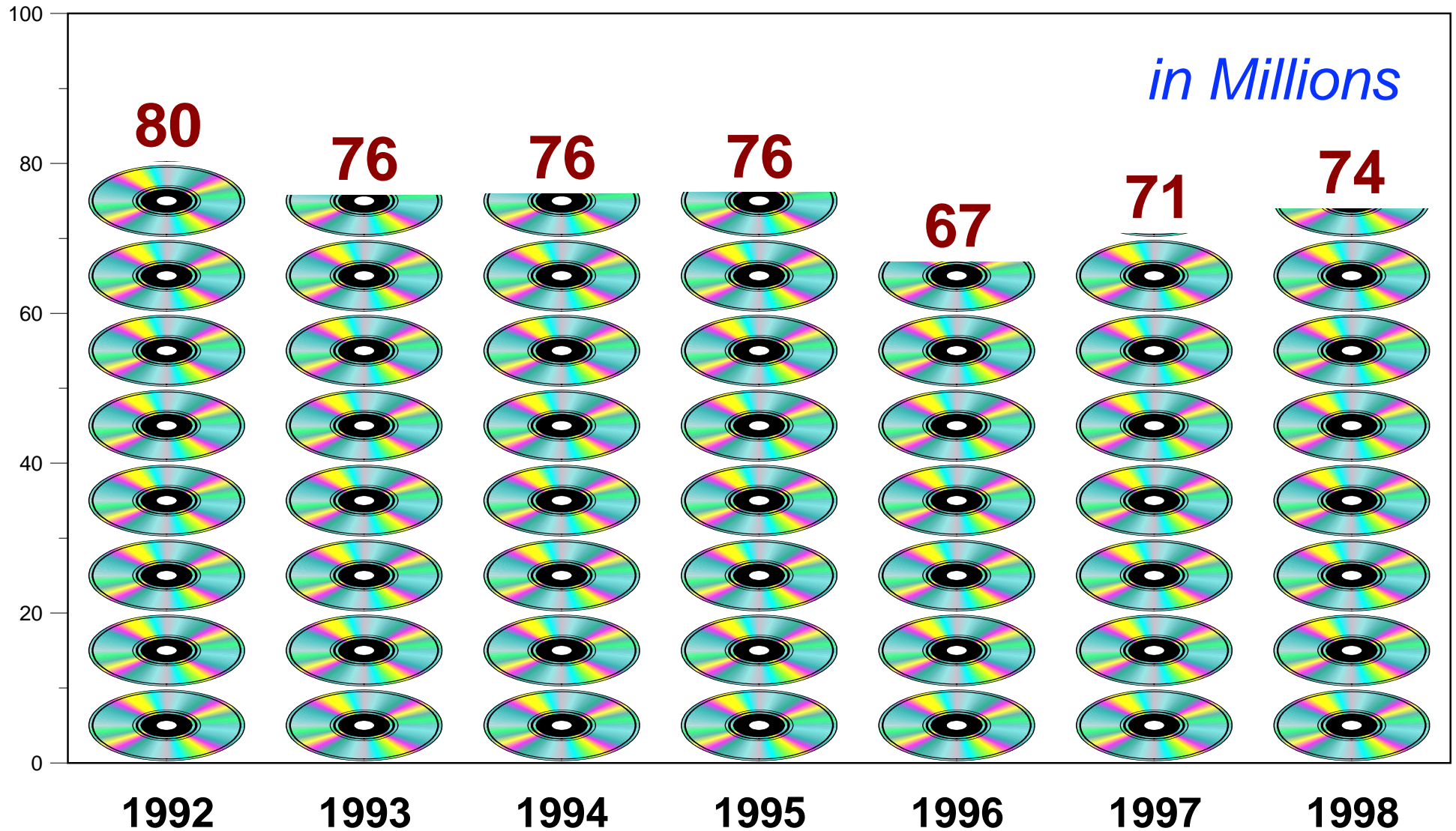
Arbitron Country Radio shares: By Region



Point Two:

Country Record
Sales are Flat

Yearly Country record sales trend:



Source: SoundScan

"Yeah, but that's only
because of Garth & Shania"

"Yeah, but that's only
because of Pop Crossover"

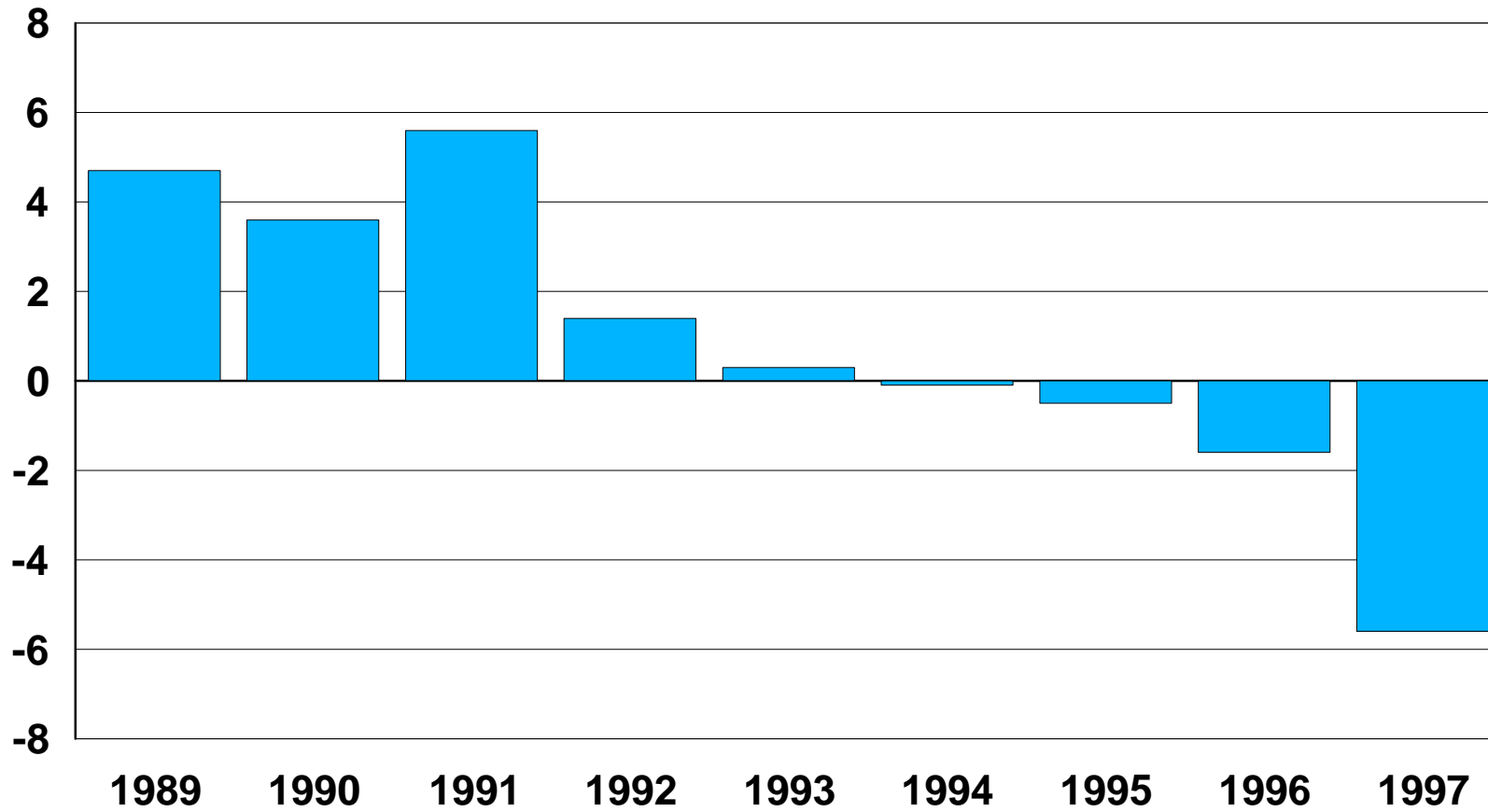
Why is radio
down

Thought #1:

"The Records
aren't good"

Average Test Score By Year

song performance vs. average

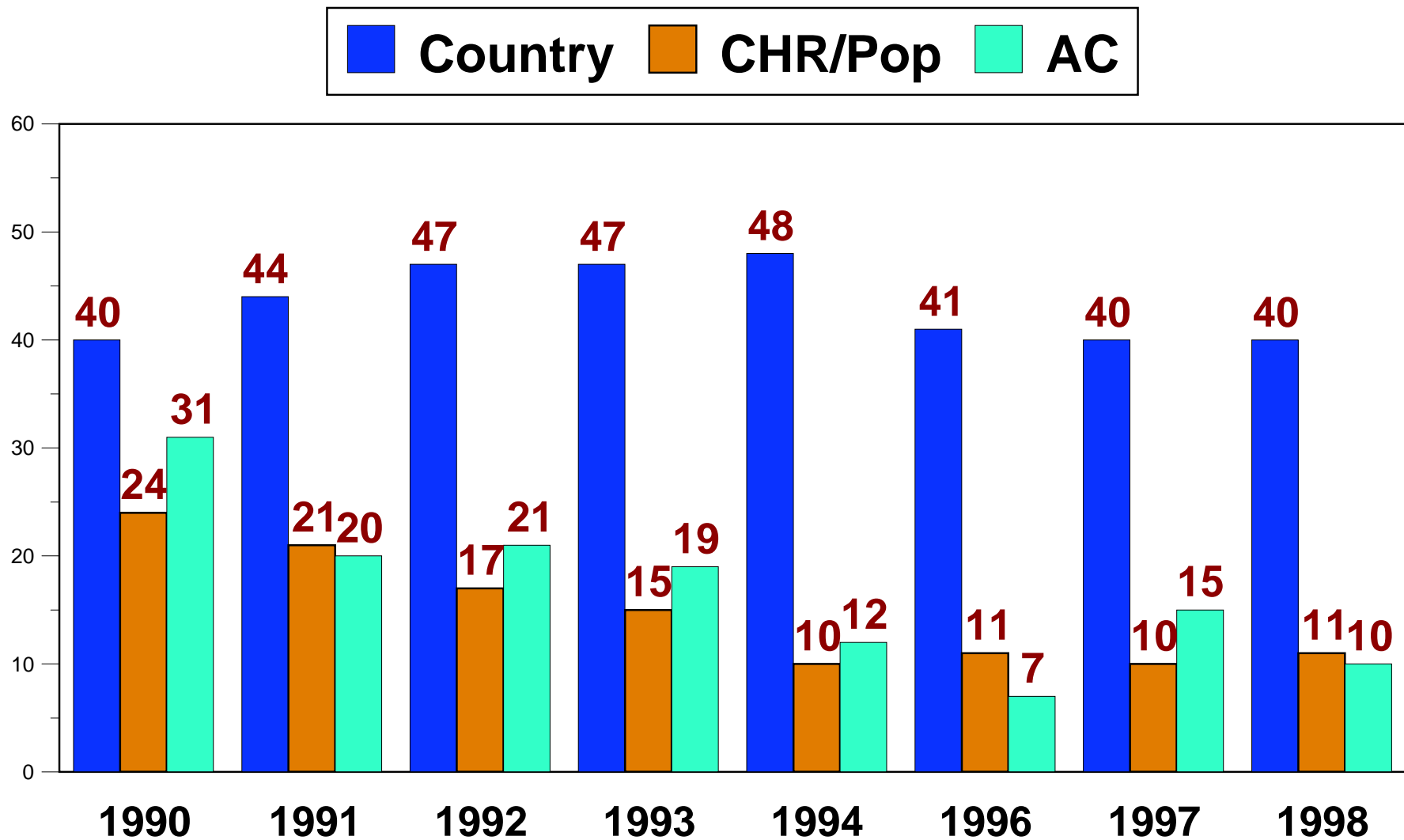


Source: 1998/99 Nationwide music testing

If the records are no good:

Why are there
so many #1s?

Number of #1 songs by format:

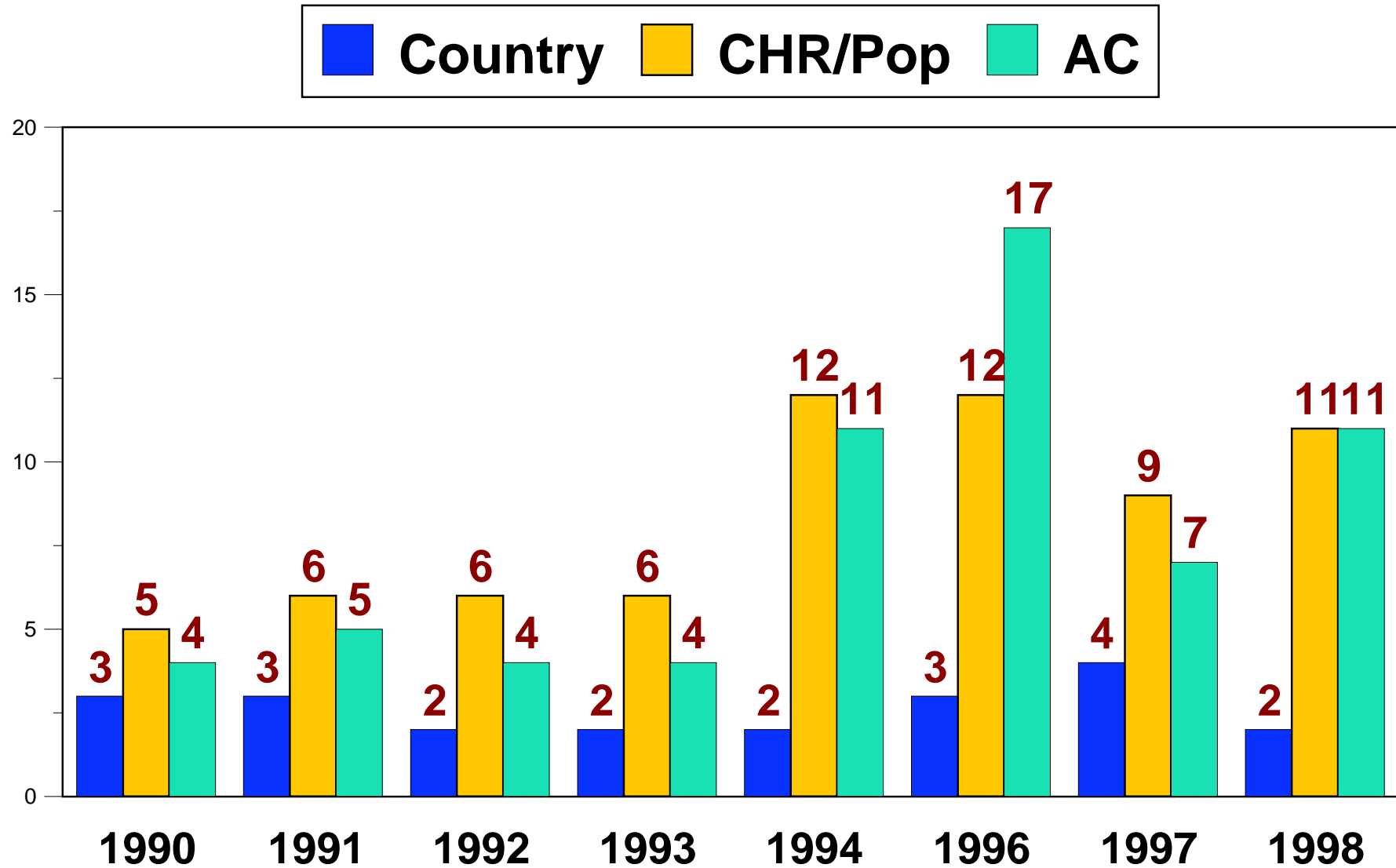


Source: *Radio & Records*

If the records are no good:

Why do Country stations
play the good ones
so little?

Most consecutive weeks for a #1 song:



Source: *Radio & Records*

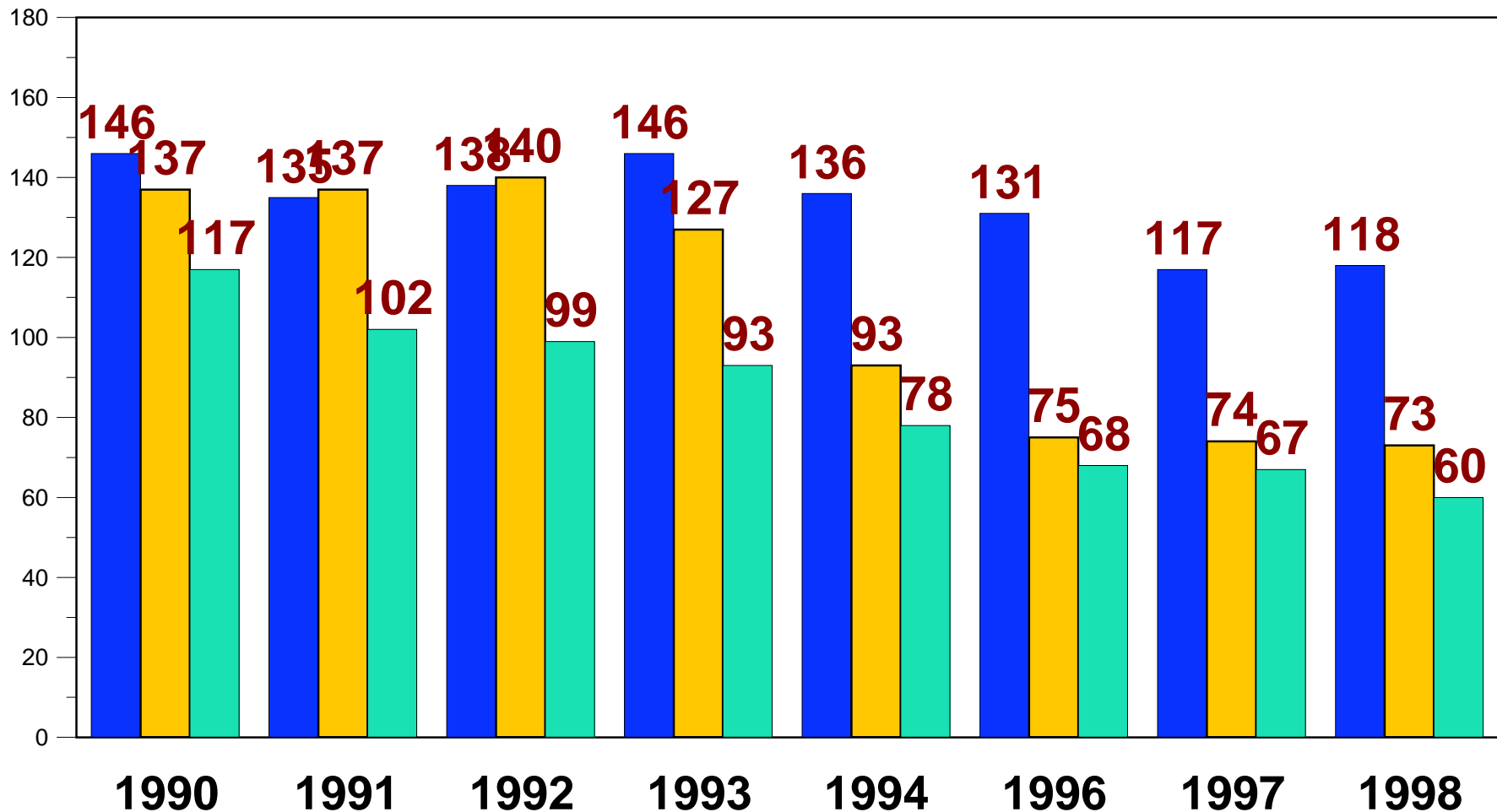
"This Kiss"

In many markets, total spins on the Pop and AC stations exceeded spins on the country stations

If the records are no good:

Why are so
many songs
making the
Top 15?

How many *different songs* were in the Top 15?



If the records are no good:

Why do so few
Country stations
do call-out?

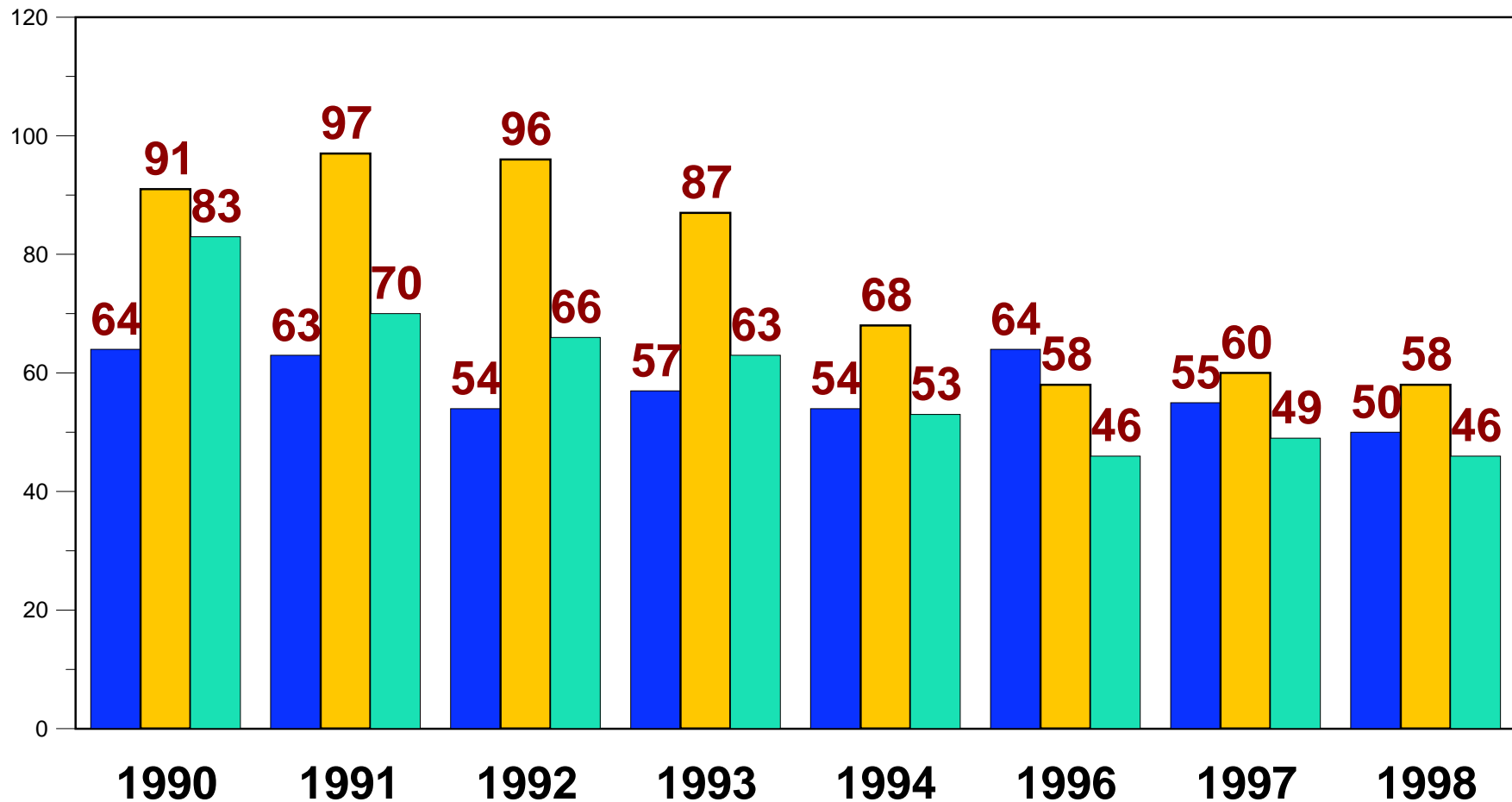
Thought #2:

"We're an artist-driven format, and The Superstars are letting us down"

**If there are so many songs that
deserve to make the top 15:**

**Why do they come
from so few artists?**

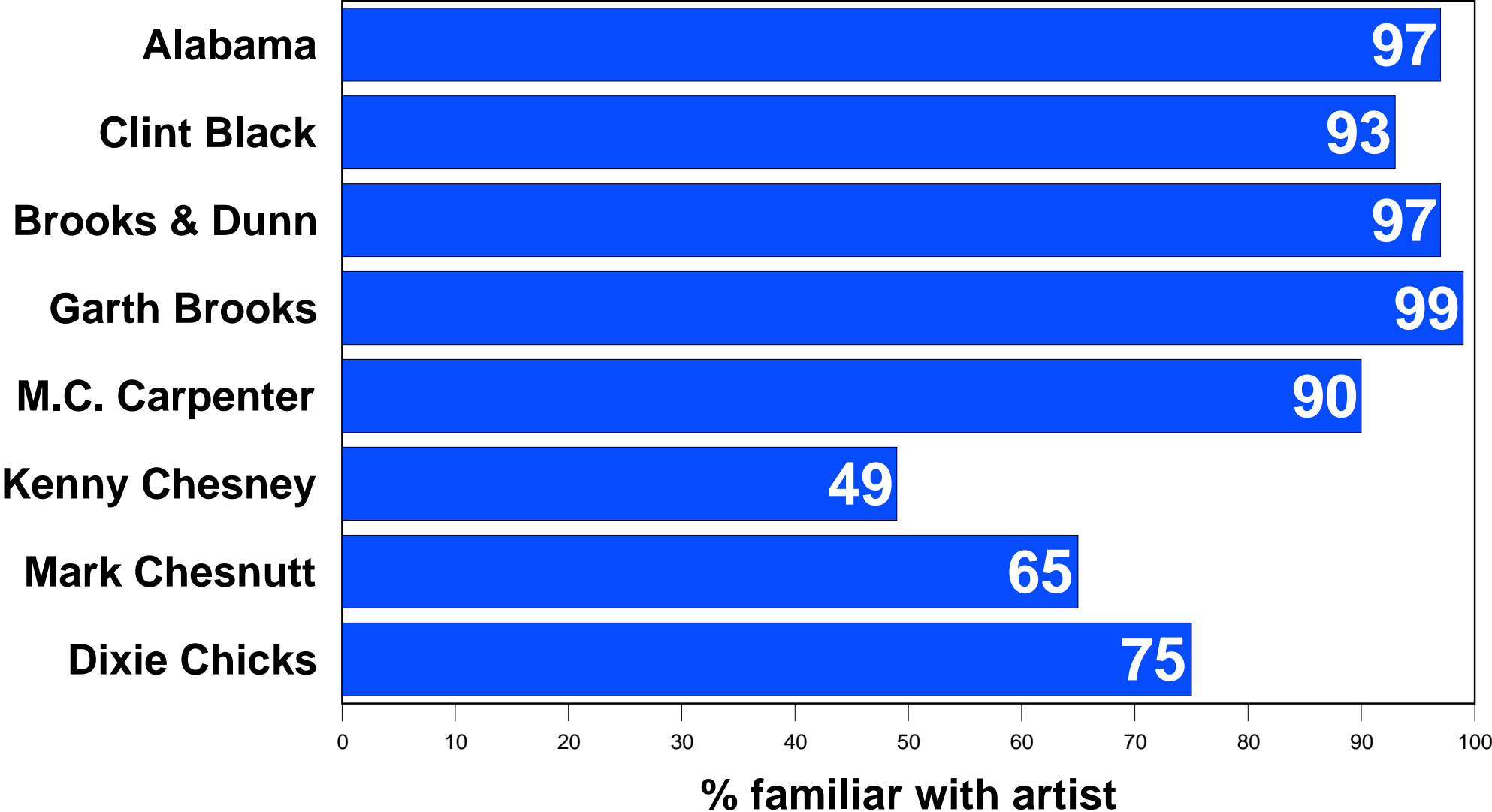
How many different *artists* were in the Top 15?



Question for the Country Radio Industry:

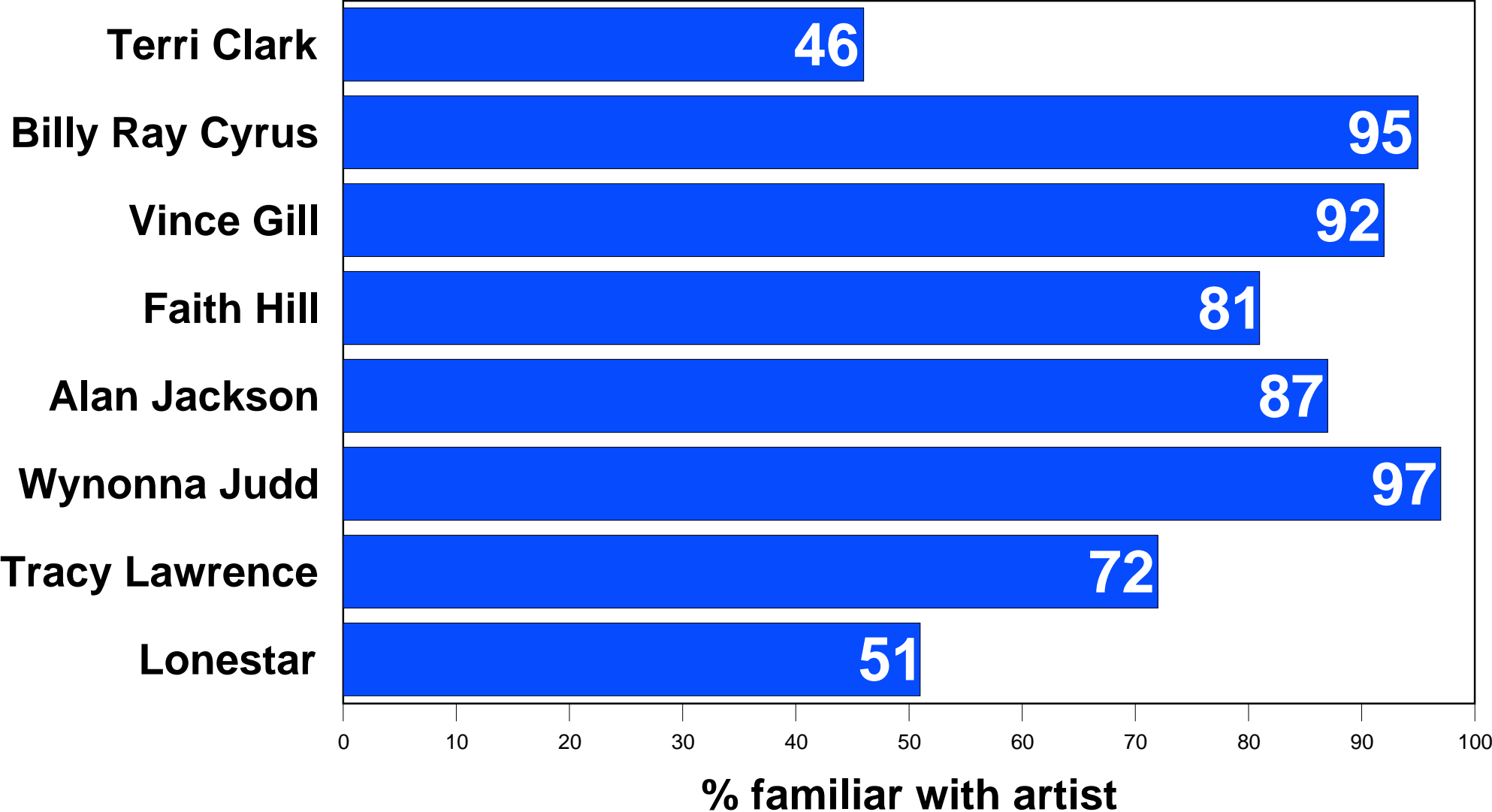
If we are an artist-
driven format; why
aren't we driving
new artists?

Country Artist Familiarity: (Page 1)



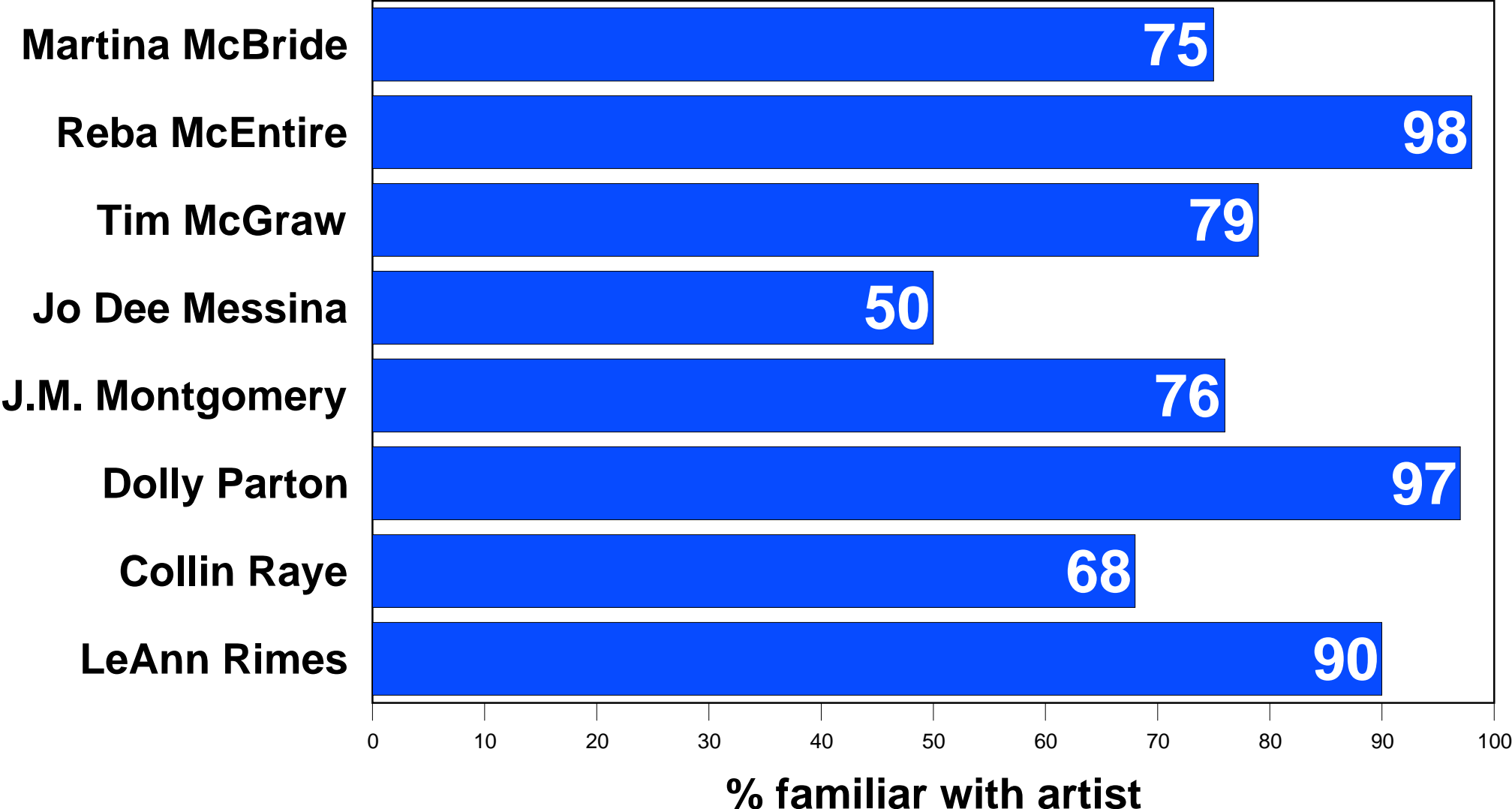
Source: CRS Survey

Country Artist Familiarity: (Page 2)



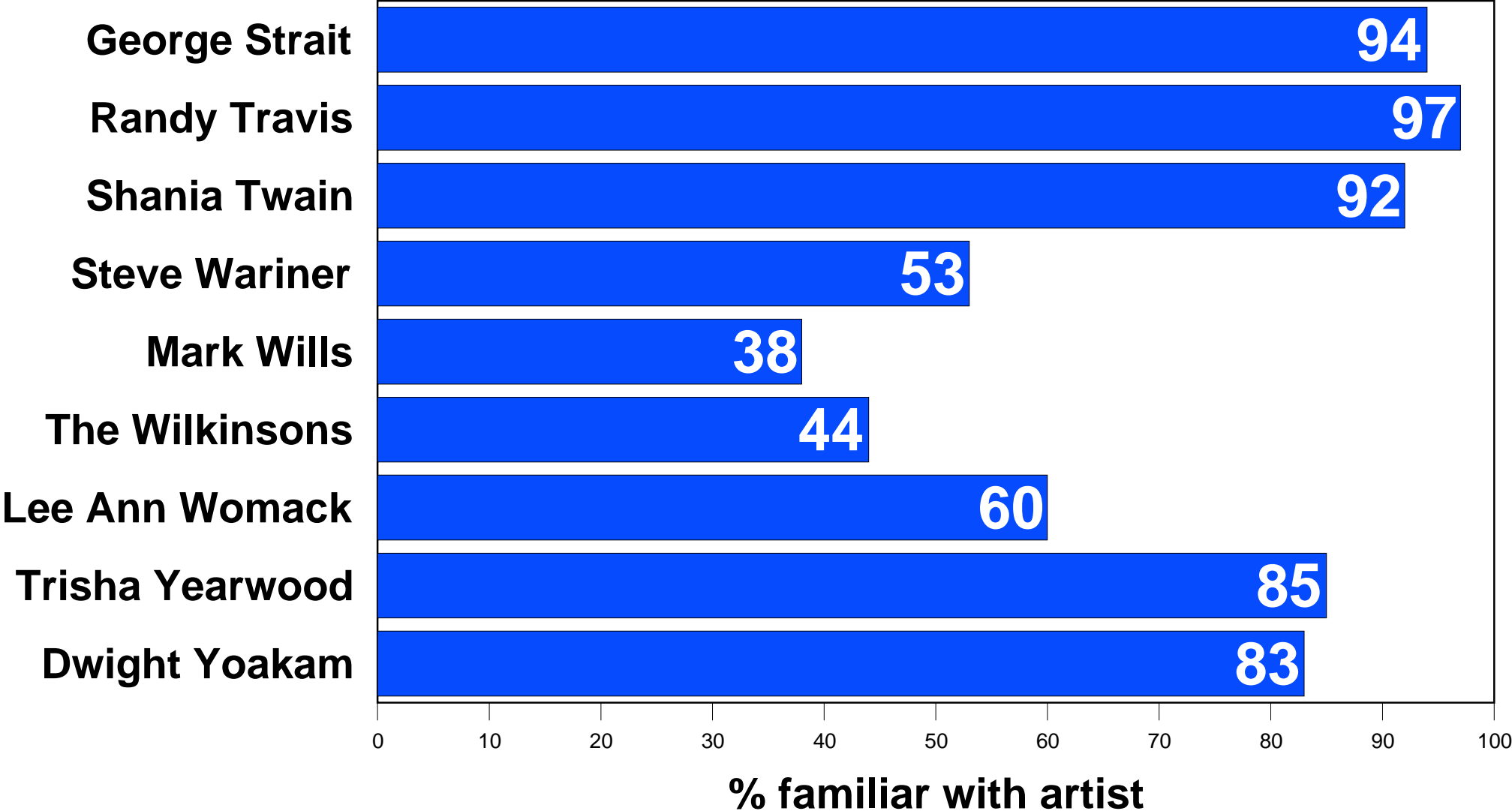
Source: CRS Survey

Country Artist Familiarity: (Page 3)



Source: CRS Survey

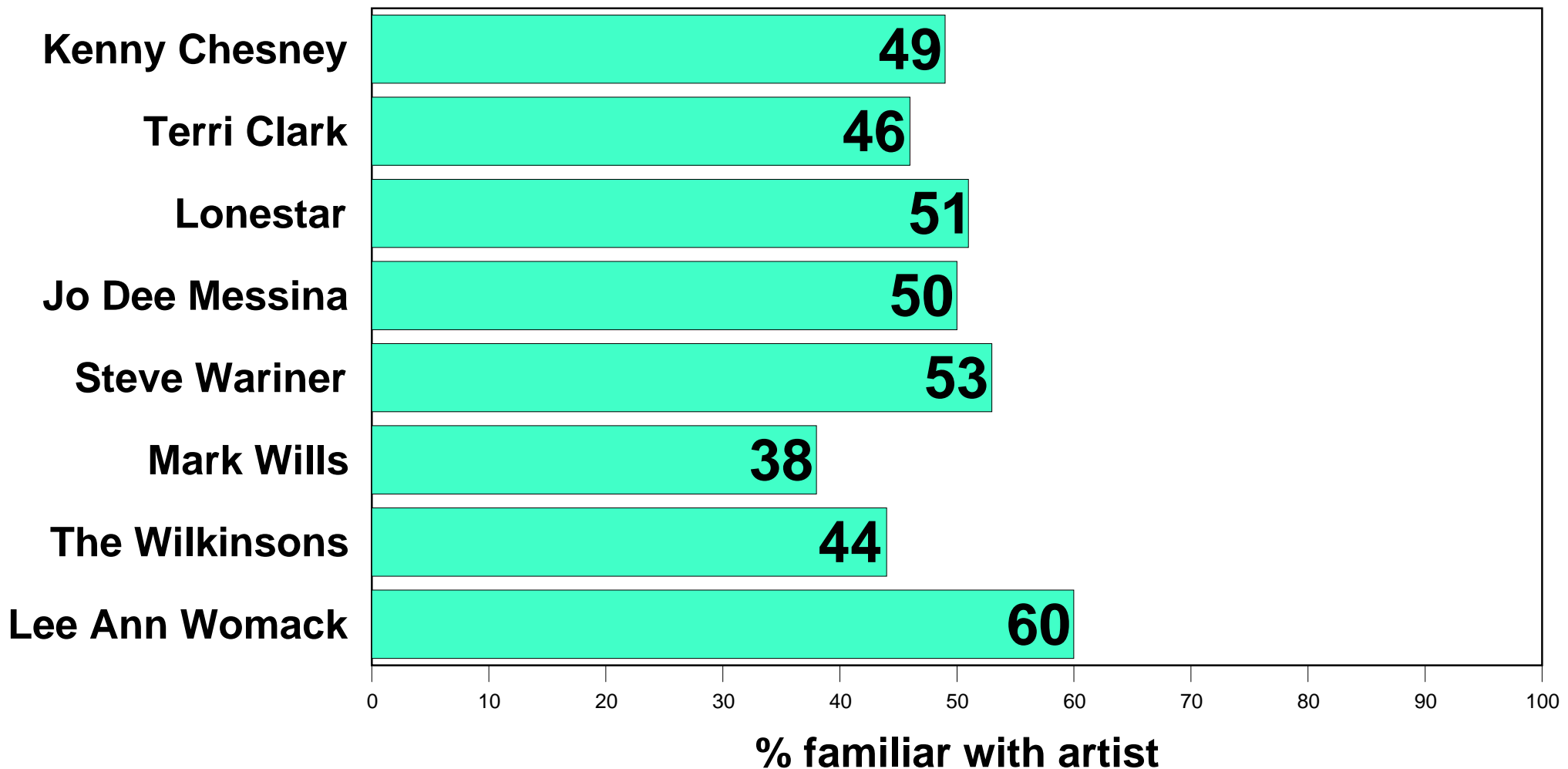
Country Artist Familiarity: (Page 4)



Source: CRS Survey

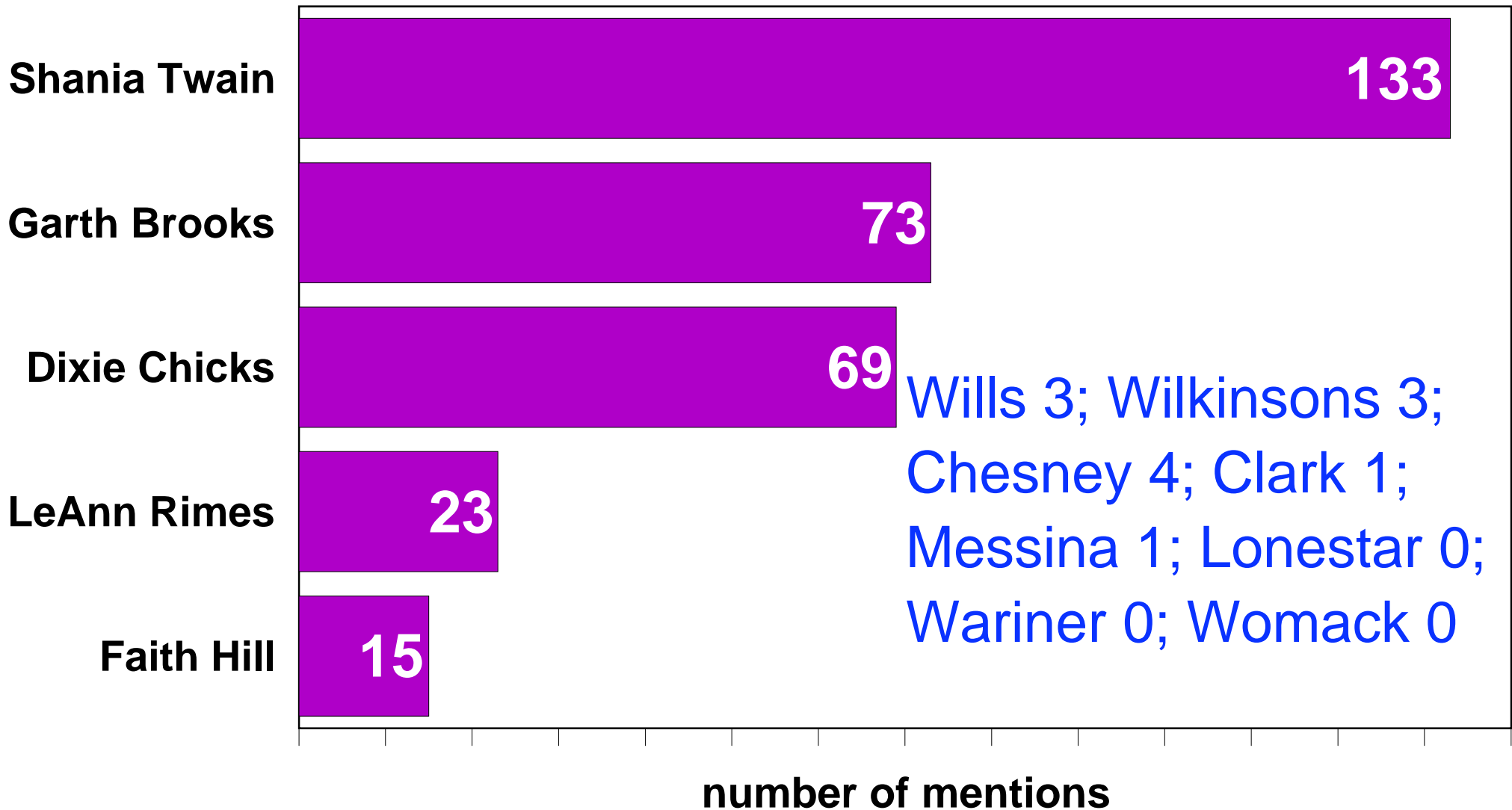
These eight artists all had #1 Hits in 1998...

...but have limited familiarity



Source: CRS Survey

Name the most *recent, new* Country singer or group you really like:

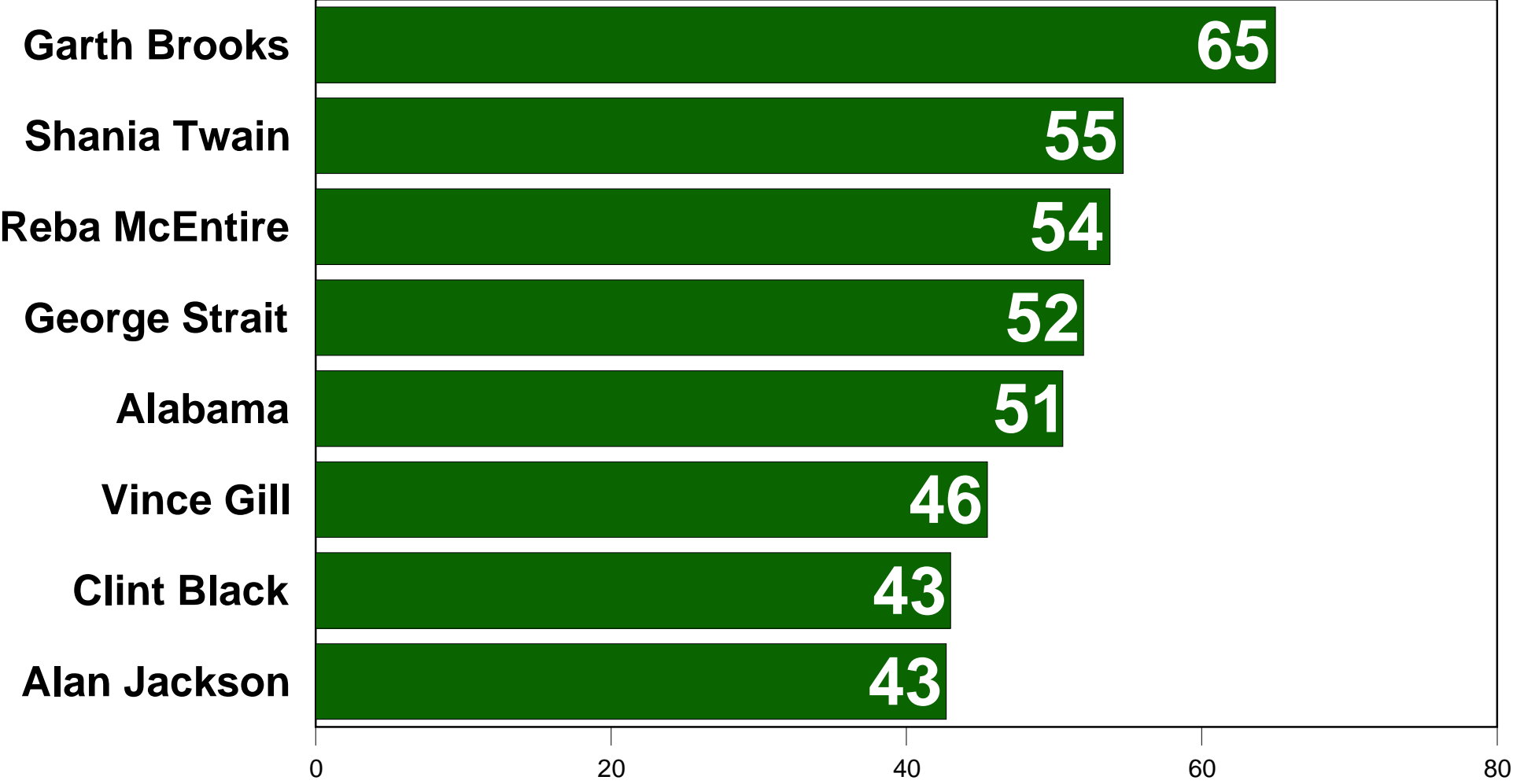


Country Radio:

Trying to have it
both ways

- Dependent on artists
- Don't let new artists (or any artists) stay #1

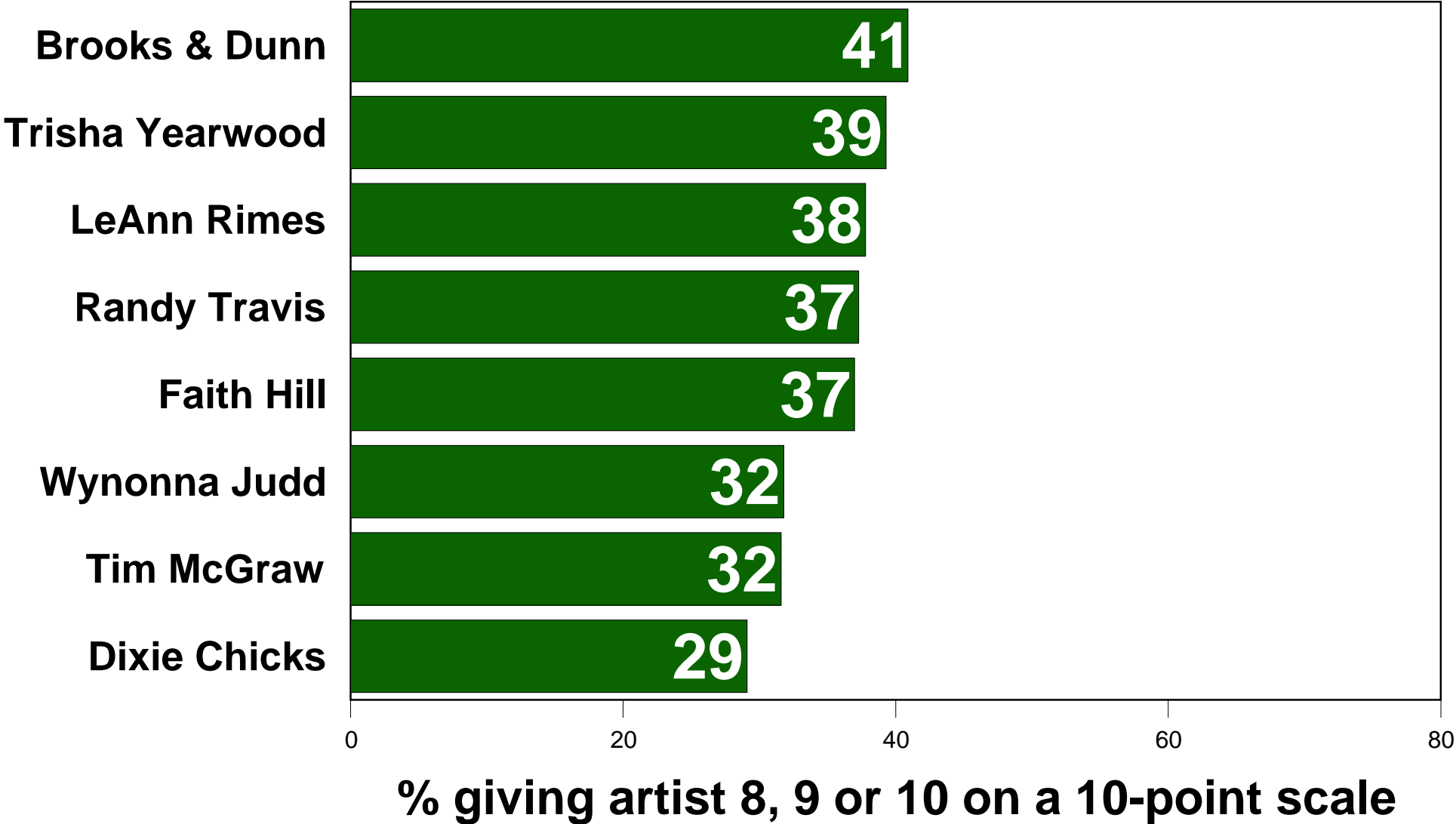
Country Artist Rating: (Page 1)



% giving artist 8, 9 or 10 on a 10-point scale

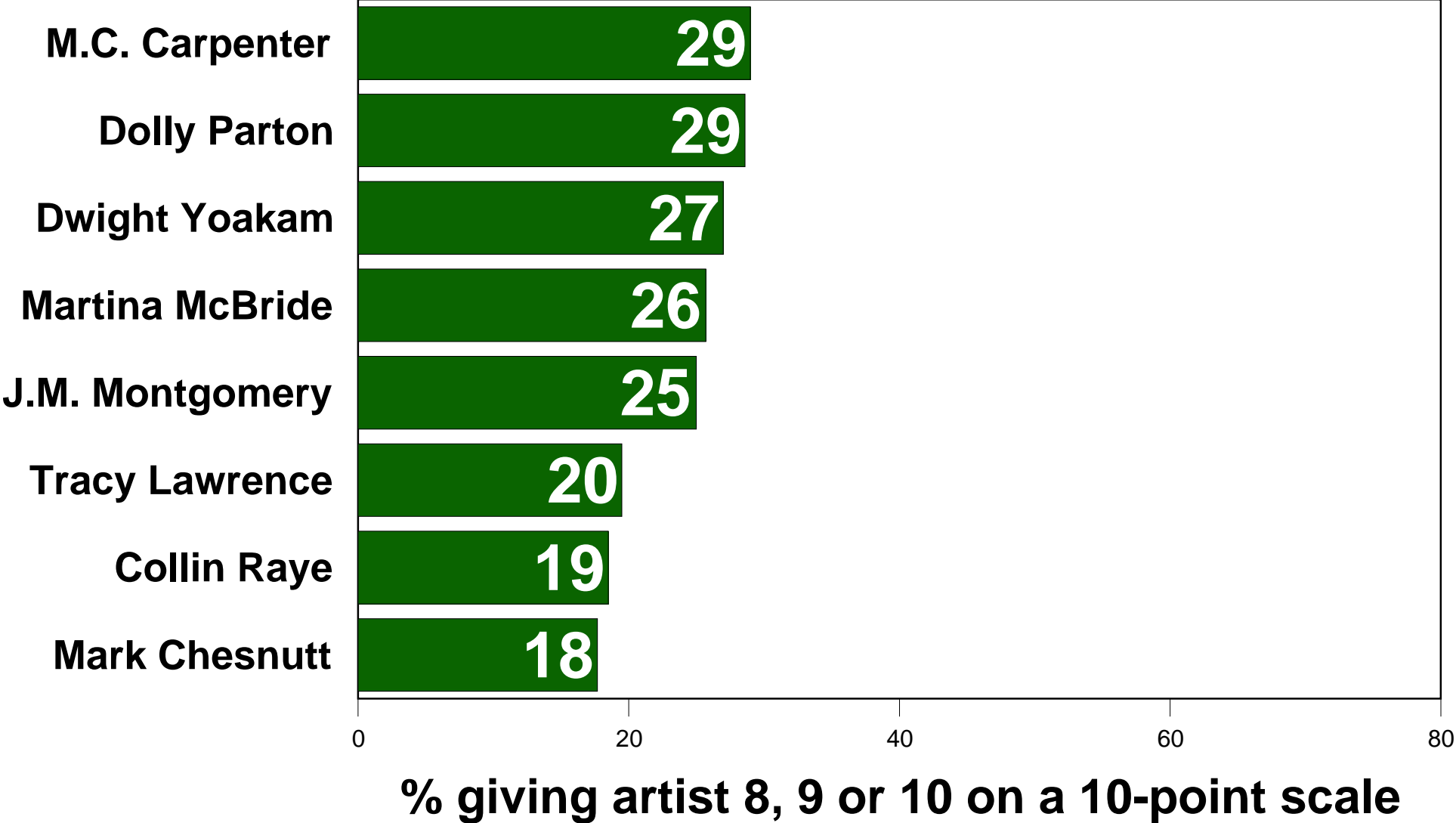
Source: CRS Survey

Country Artist Rating: (Page 2)



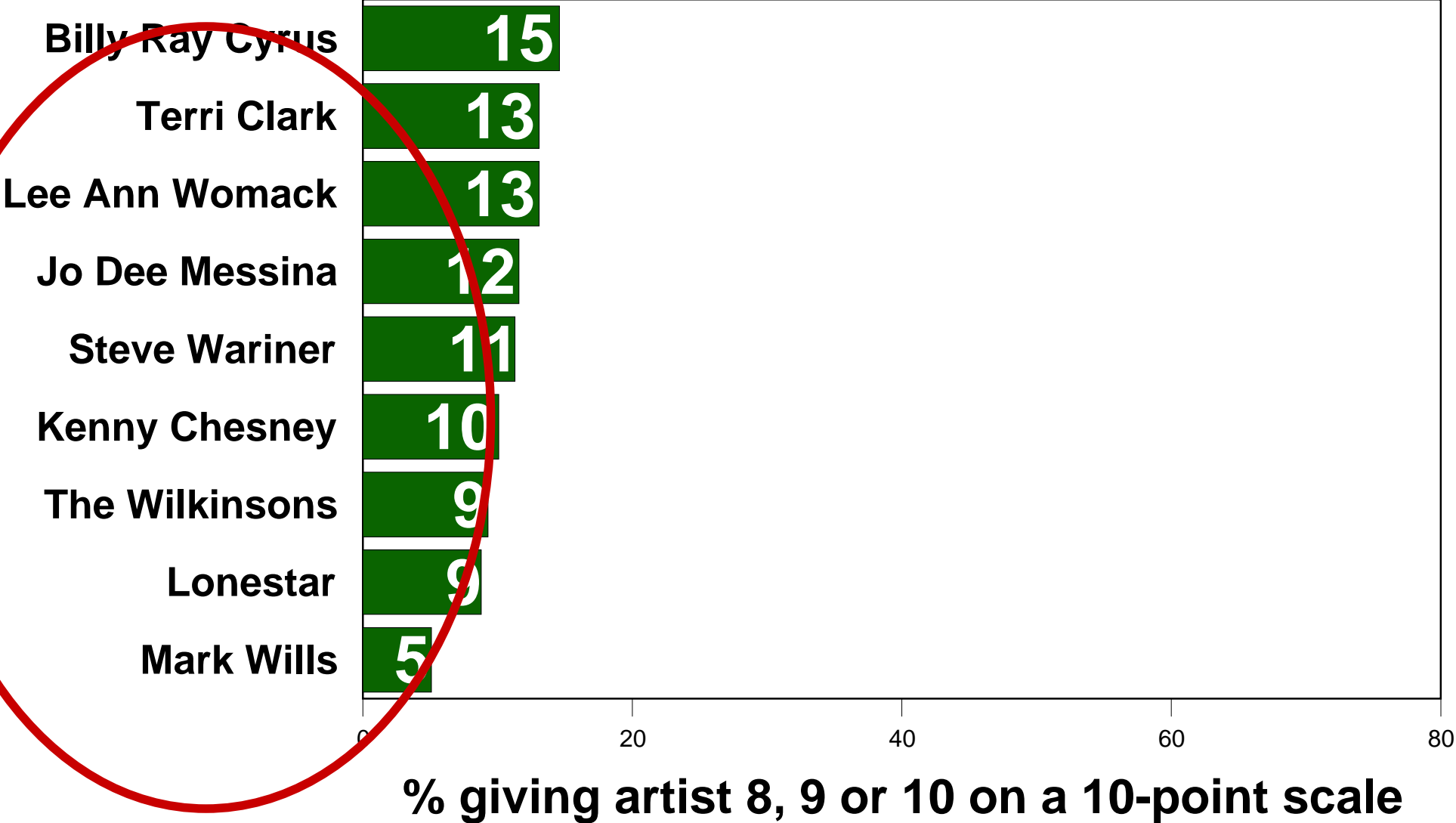
Source: CRS Survey

Country Artist Rating: (Page 3)



Source: CRS Survey

Country Artist Rating: (Page 4)



Source: CRS Survey

Either:

Let a song stay #1 longer

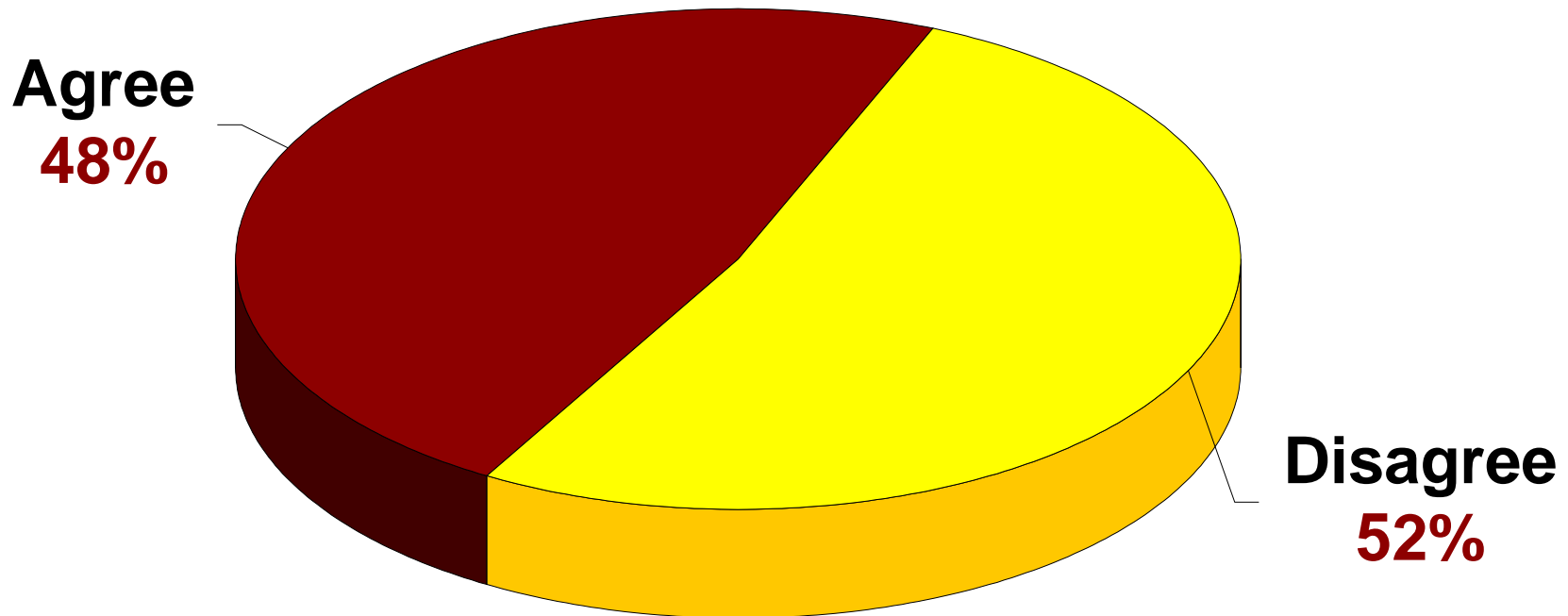
Or:

Make a commitment to artists

Question for the Country Radio Industry:

Are we killing
ourselves out of
loyalty to the
"Superstars"?

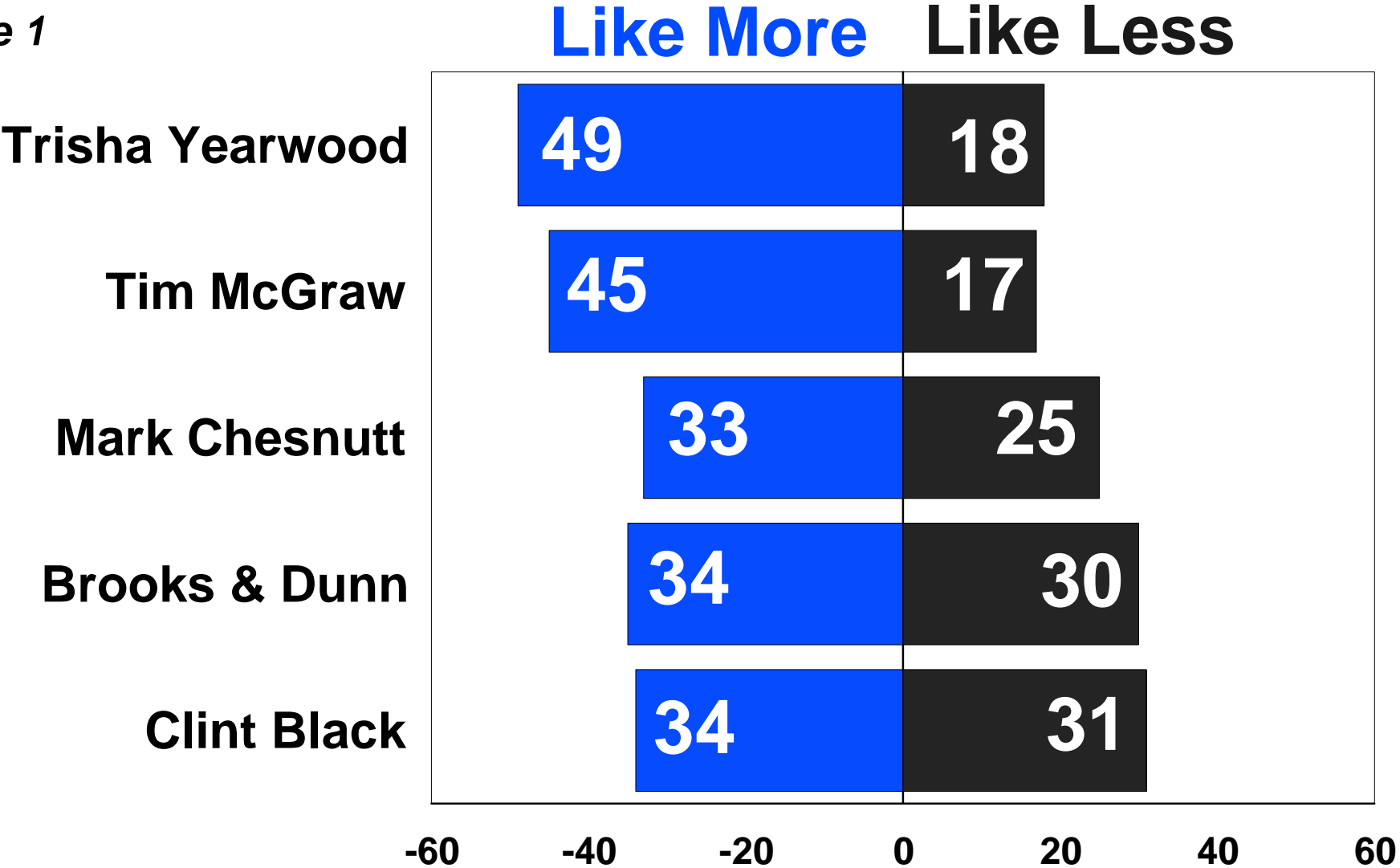
"Country radio stations seem to play any songs the established artists produce, regardless of whether the songs are good"



**Like the more recent songs by these artists
more or less than their older music?**

Like the more recent songs by these artists more or less than their older music?

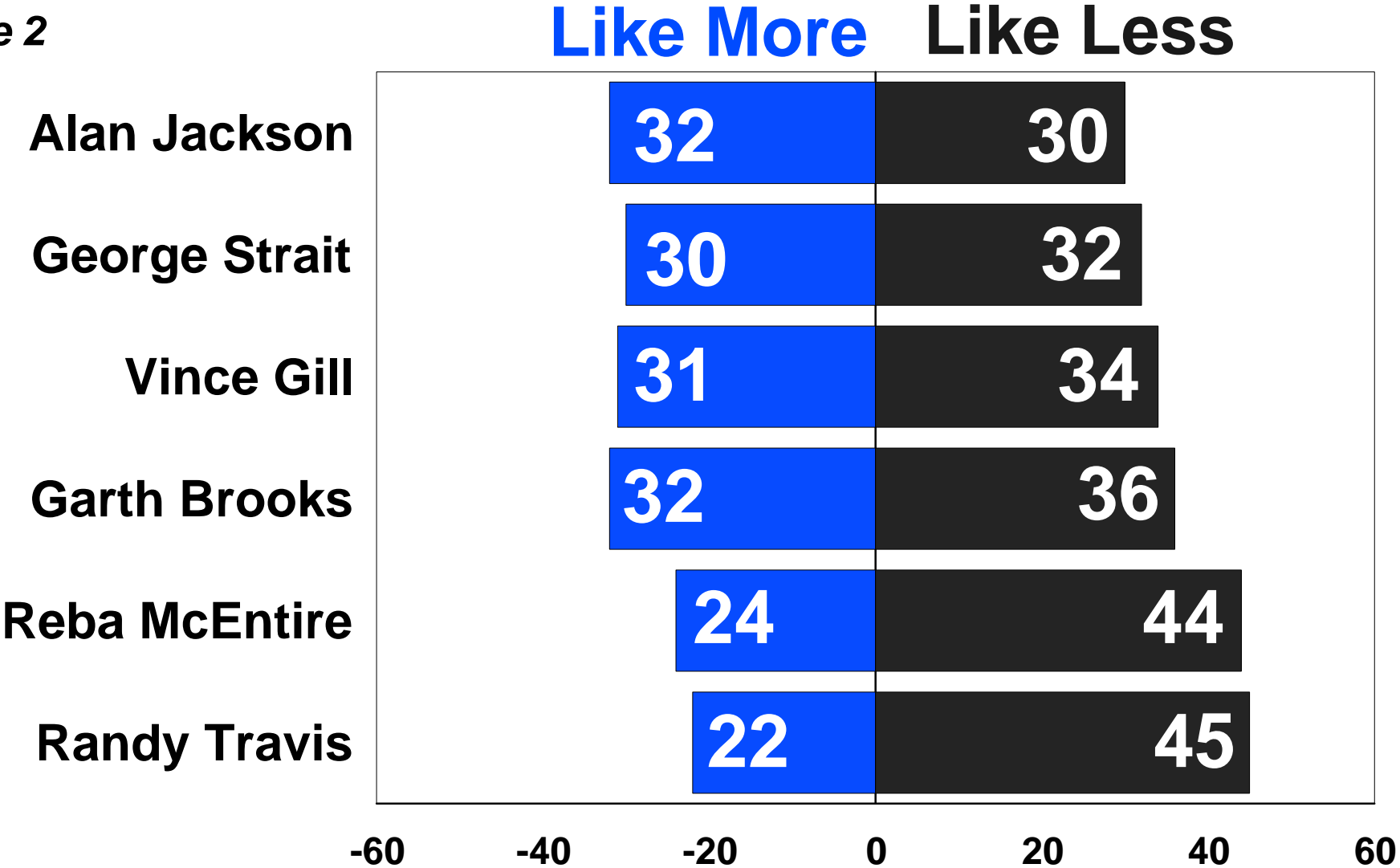
Page 1



Source: CRS Survey

Like the more recent songs by these artists more or less than their older music?

Page 2



Source: CRS Survey

Question for the Country Radio Industry:

Is it time to
get out of the
artist development
business

...and leave that problem to the record companies?

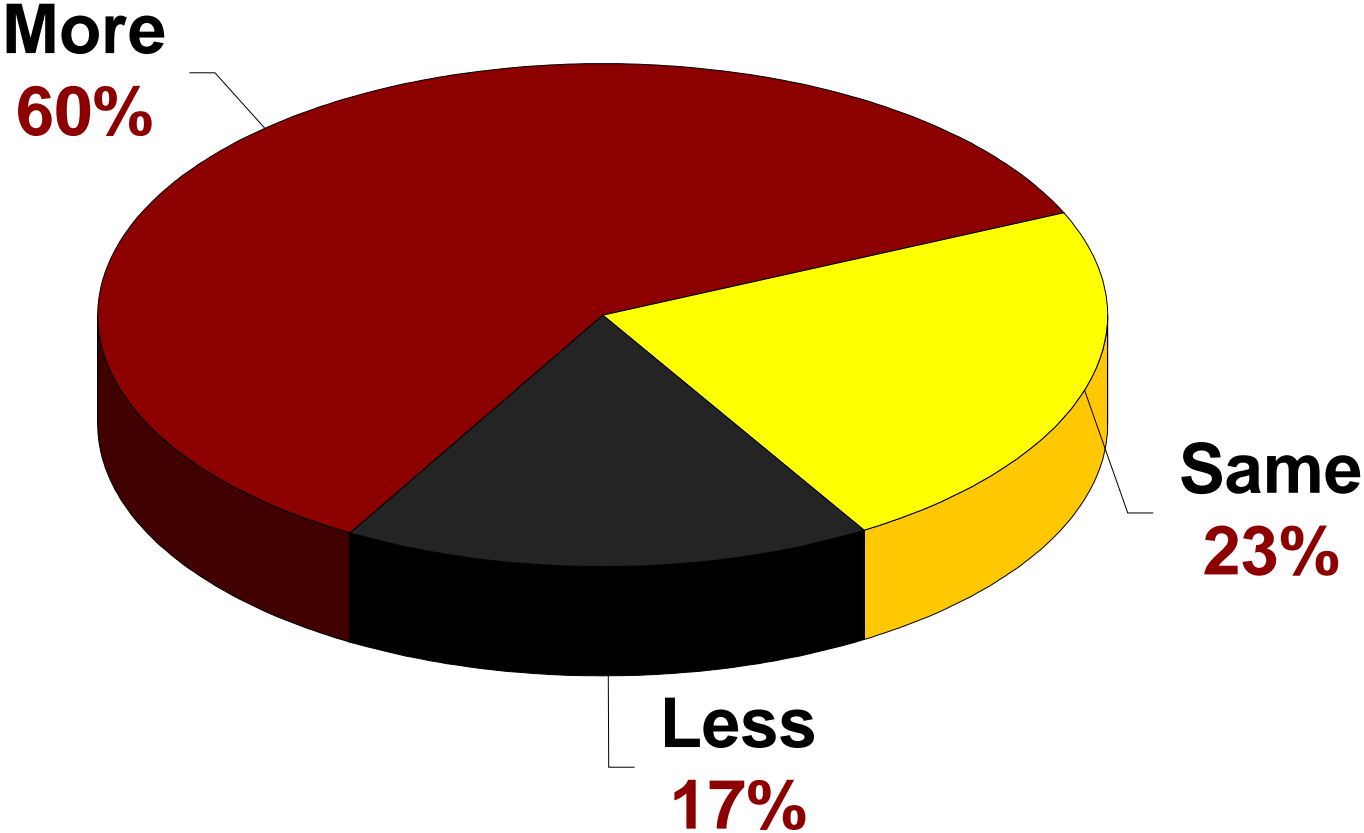
Question for the Country Radio Industry:

Is it time to
think song first
and artist second?

Thought #3:

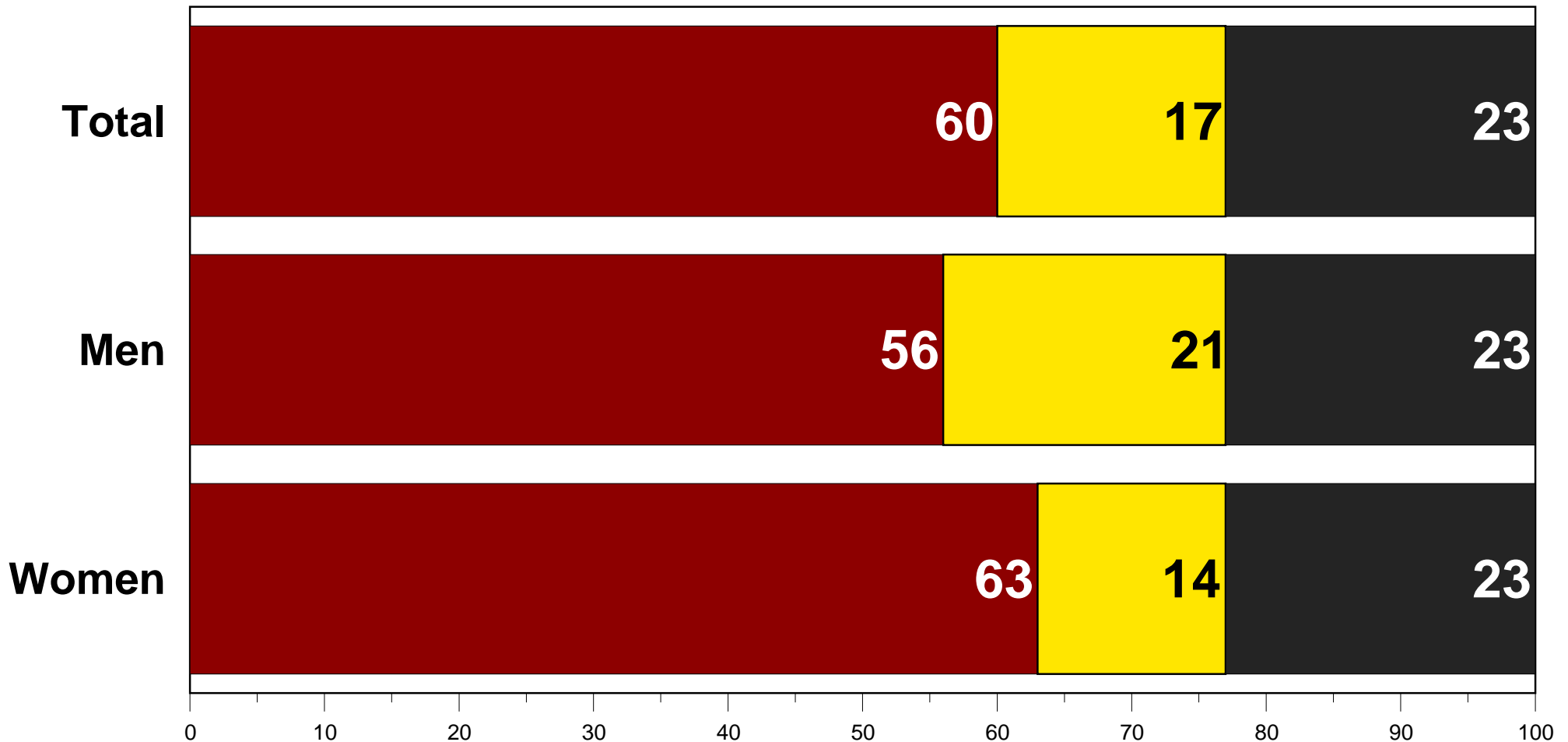
"What's going on
with men?"

Like Country music more or less than you used to?



Source: CRS Survey

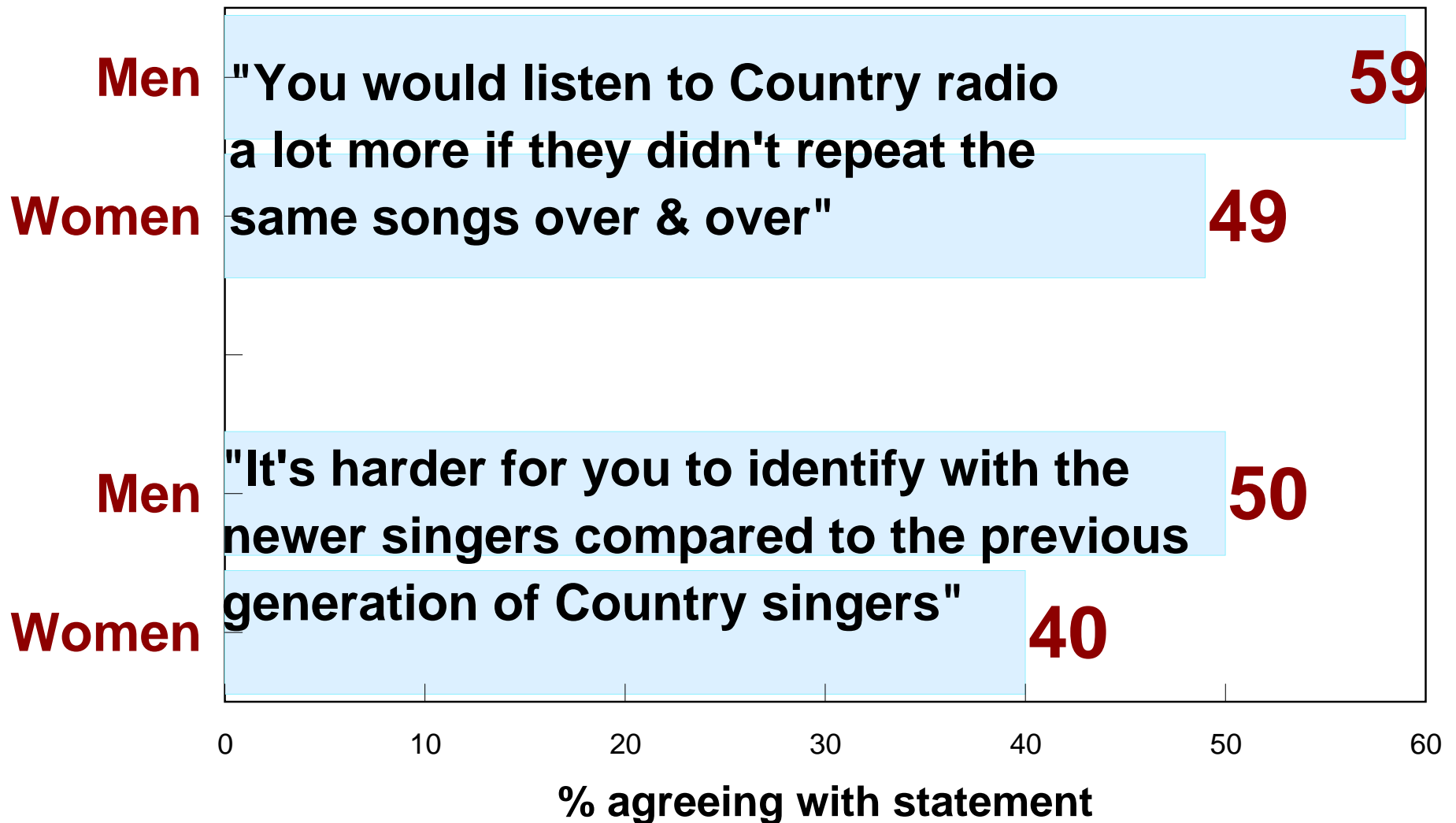
Like Country music more or less than you used to?



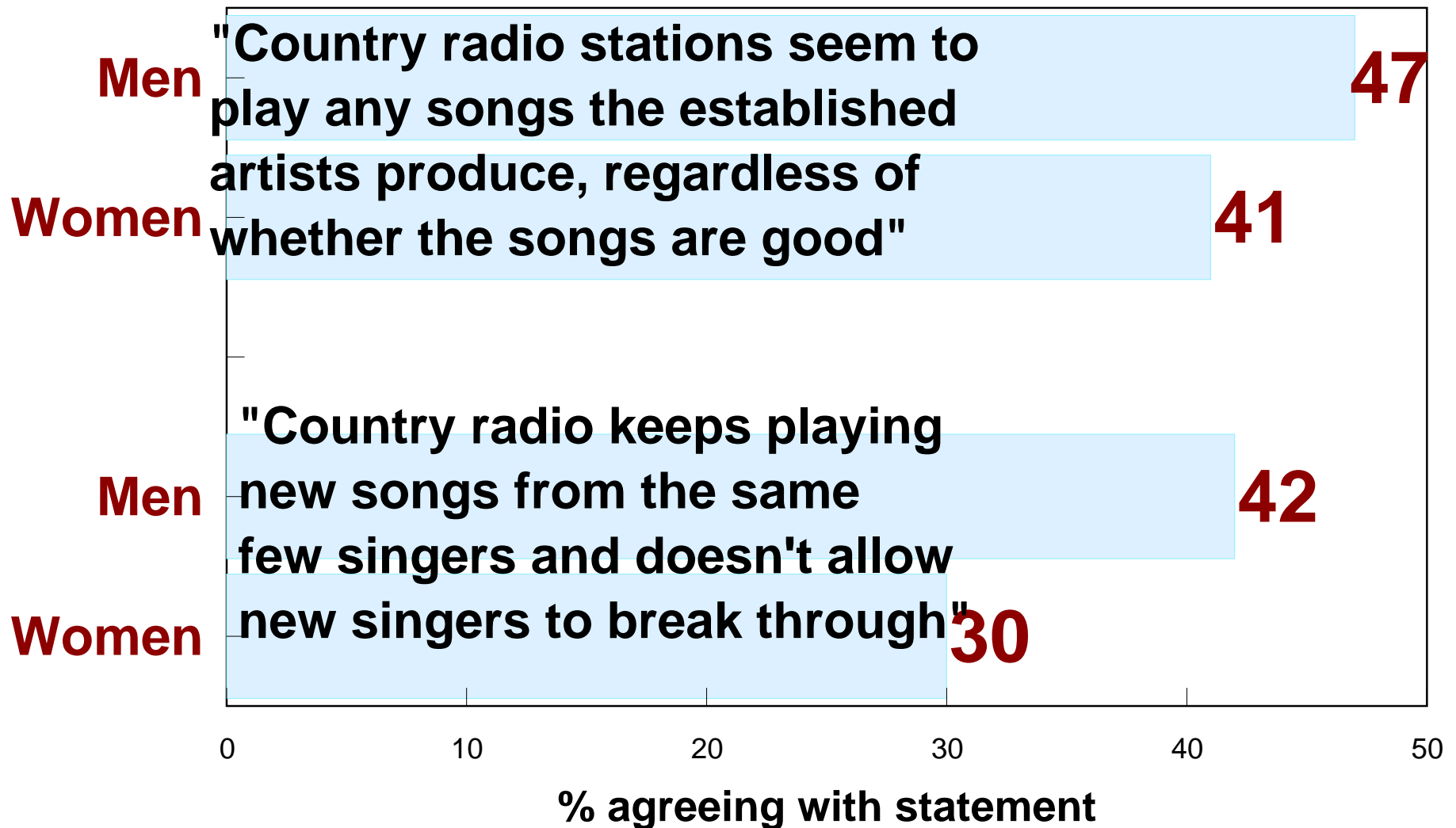
Source: CRS Survey

Do you agree with the following statements about Country?

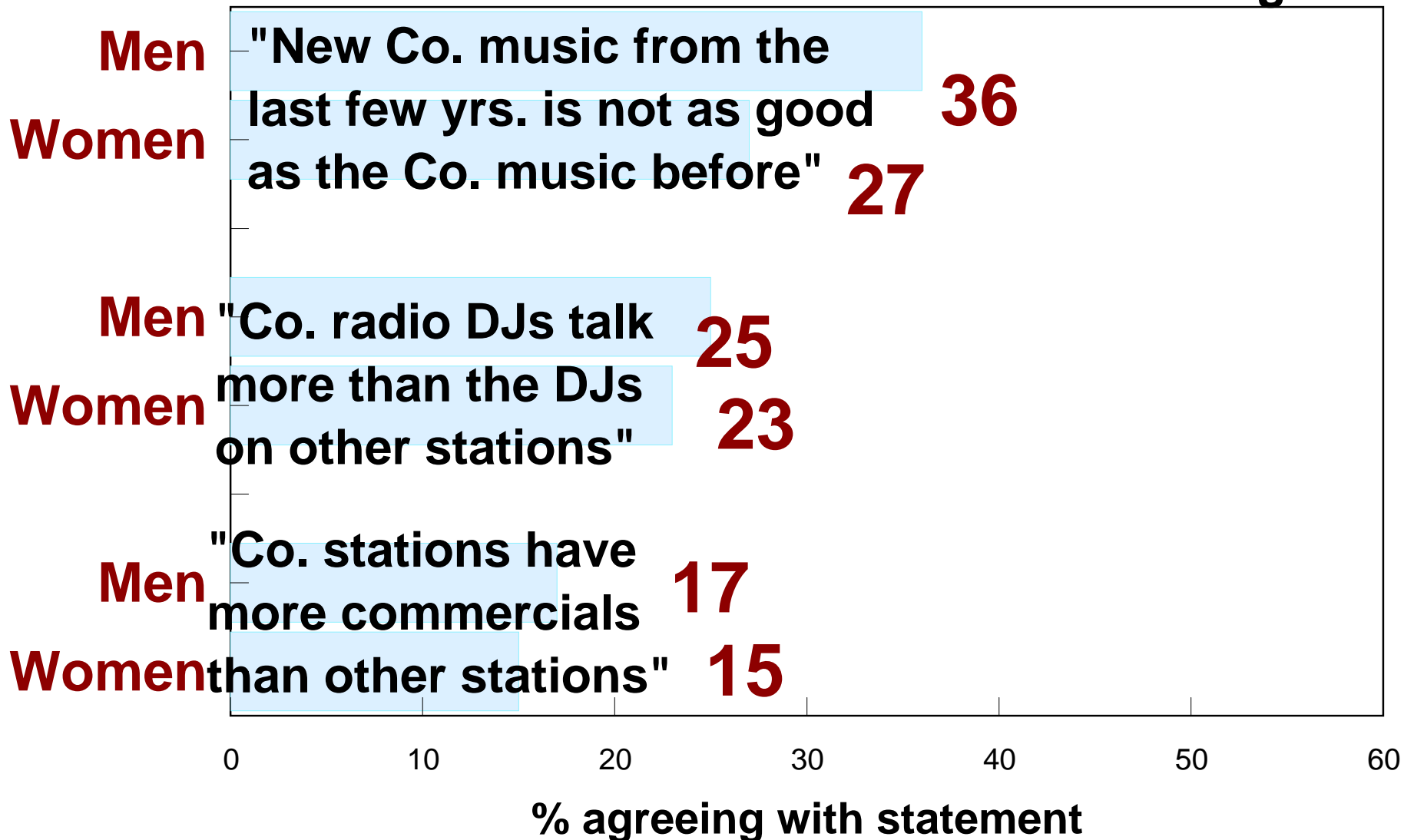
Page 1



Do you agree with the following statements about Country?



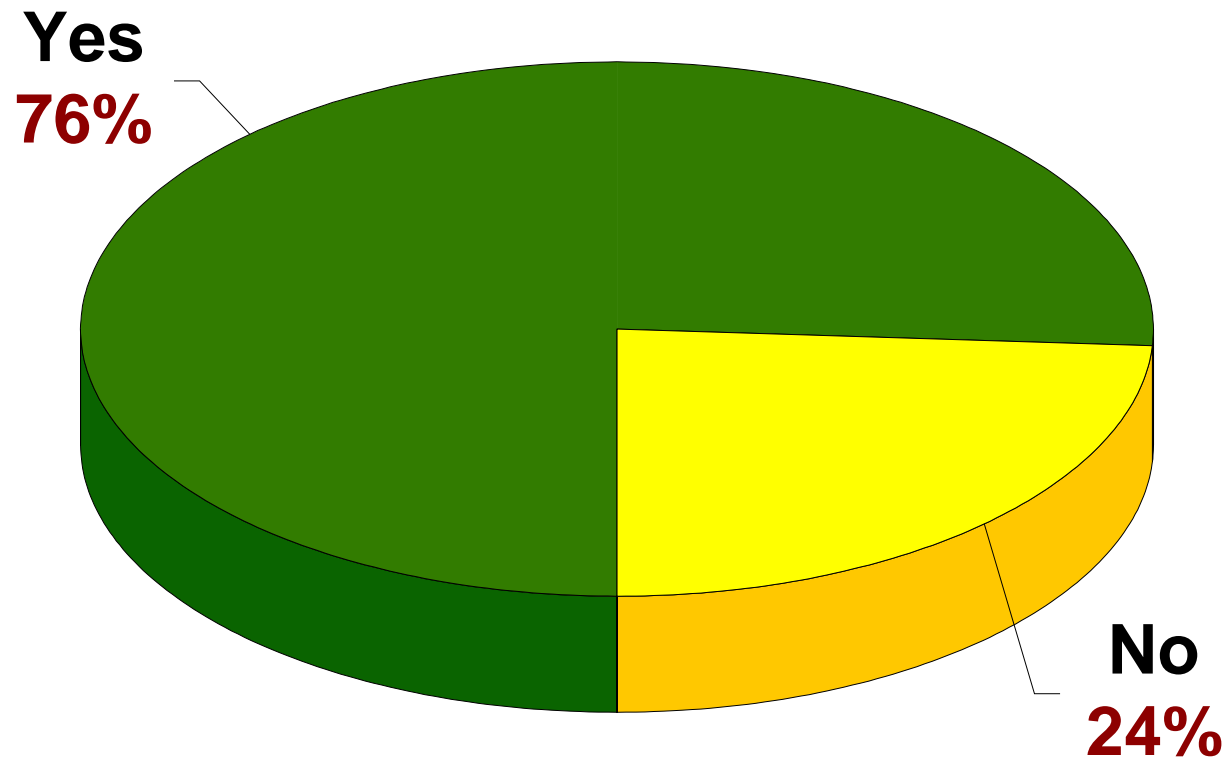
Do you agree with the following statements about Country?



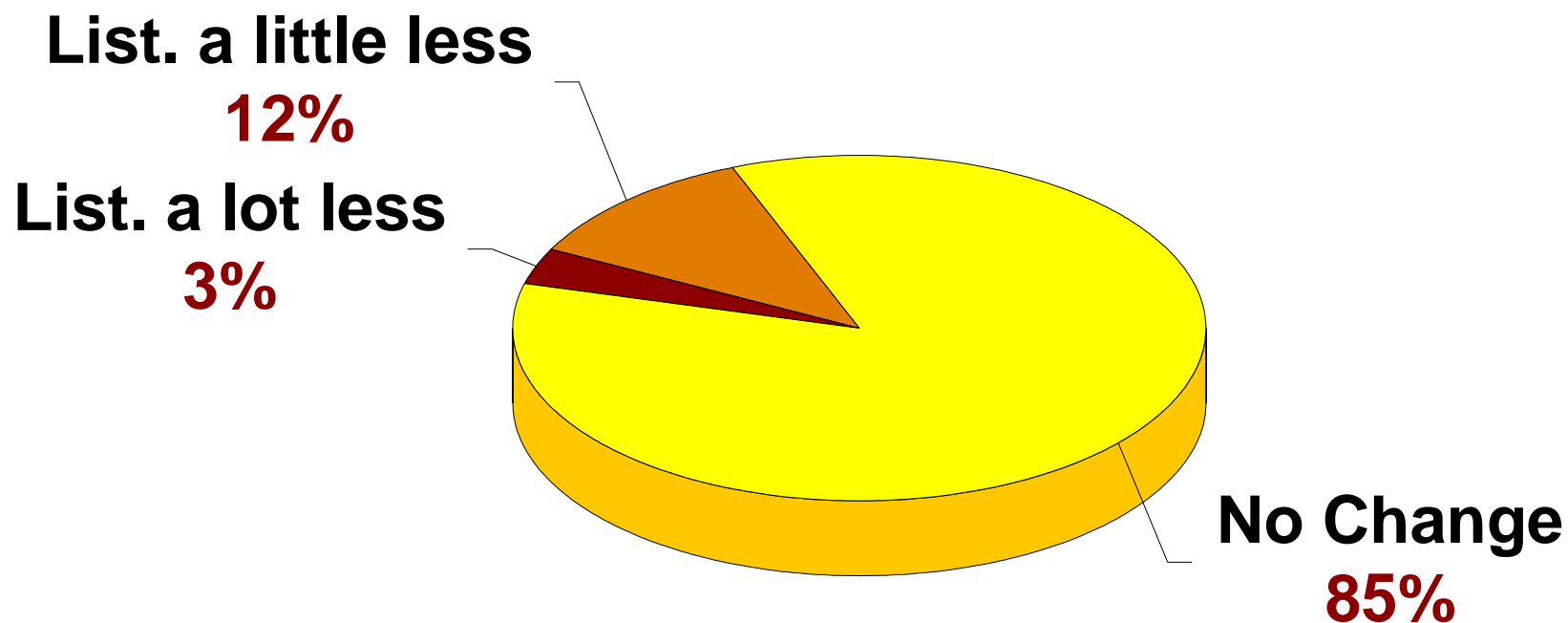
Thought #4:

"What's the
impact of
songs/artists
crossing to Pop?"

Are you aware that you can hear songs by country artists on non-Country stations?

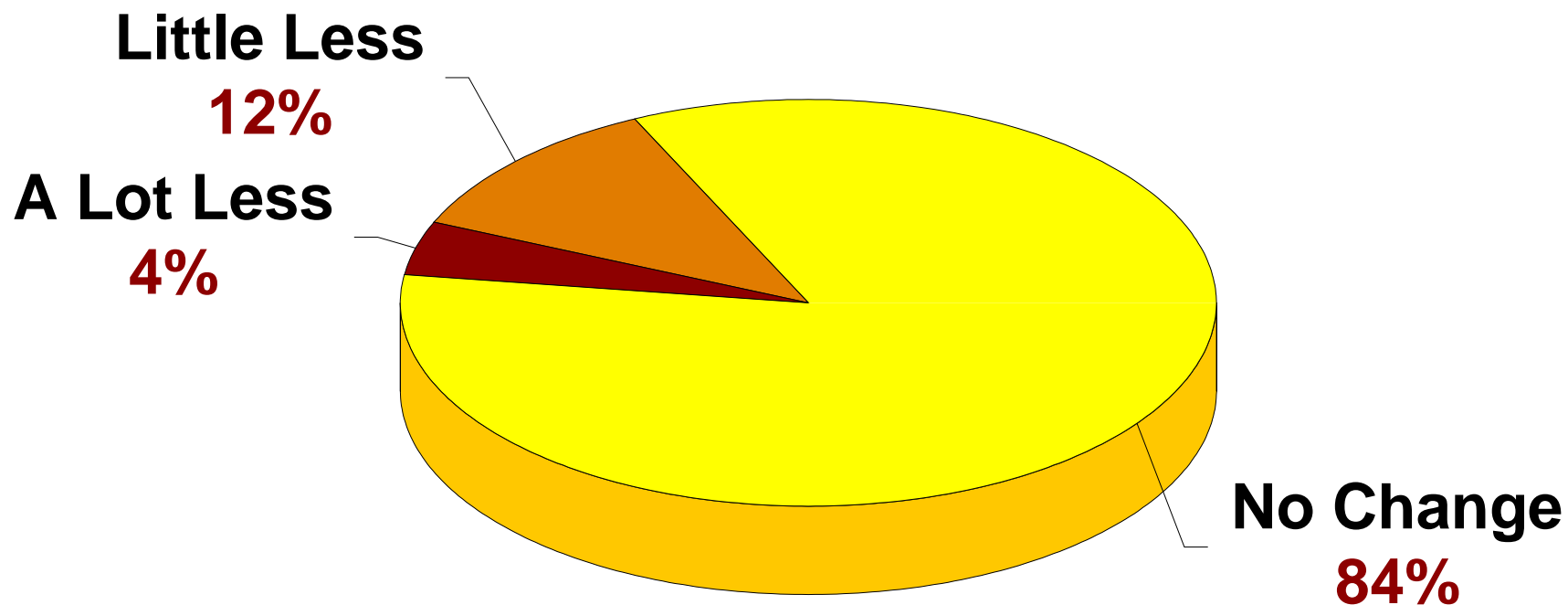


What is the impact of hearing Country songs on non-Country stations?



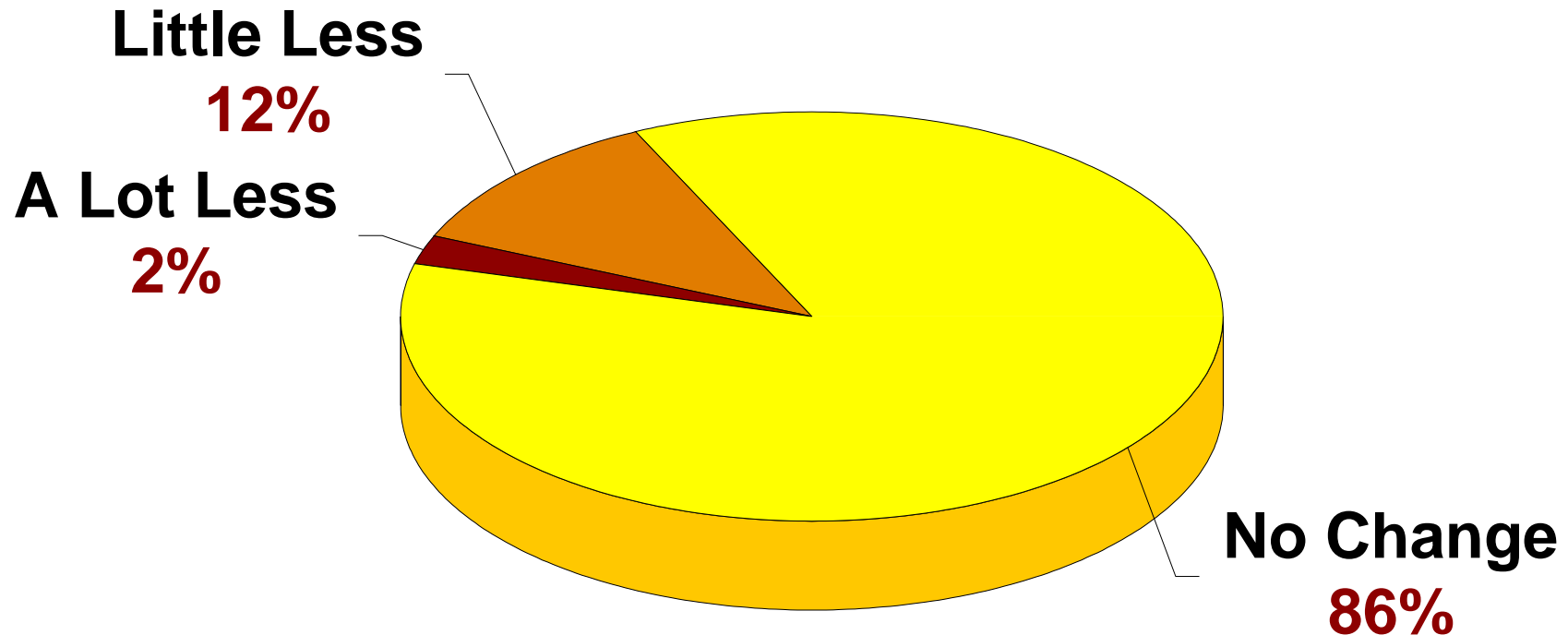
What is the impact of hearing Country songs on non-Country stations?

Down Markets



What is the impact of hearing Country songs on non-Country stations?

Flat Markets



edison media research

