



WHAT MAKES COUNTRY LISTENERS CLICK?

strategicsolutions
R E S E A R C H[®]

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CRS '26

Two-Phase Project

PHASE ONE



One on One Discussions

50 Country Music Fans

PHASE TWO



Quantitative Survey

1,500 Country Music Fans



**WHAT MAKES
COUNTRY
LISTENERS
CLICK?**

Sample Profile



100% Radio Listeners

30 mins/day & 3 days/week



18-54, 50% Female / 50% Male

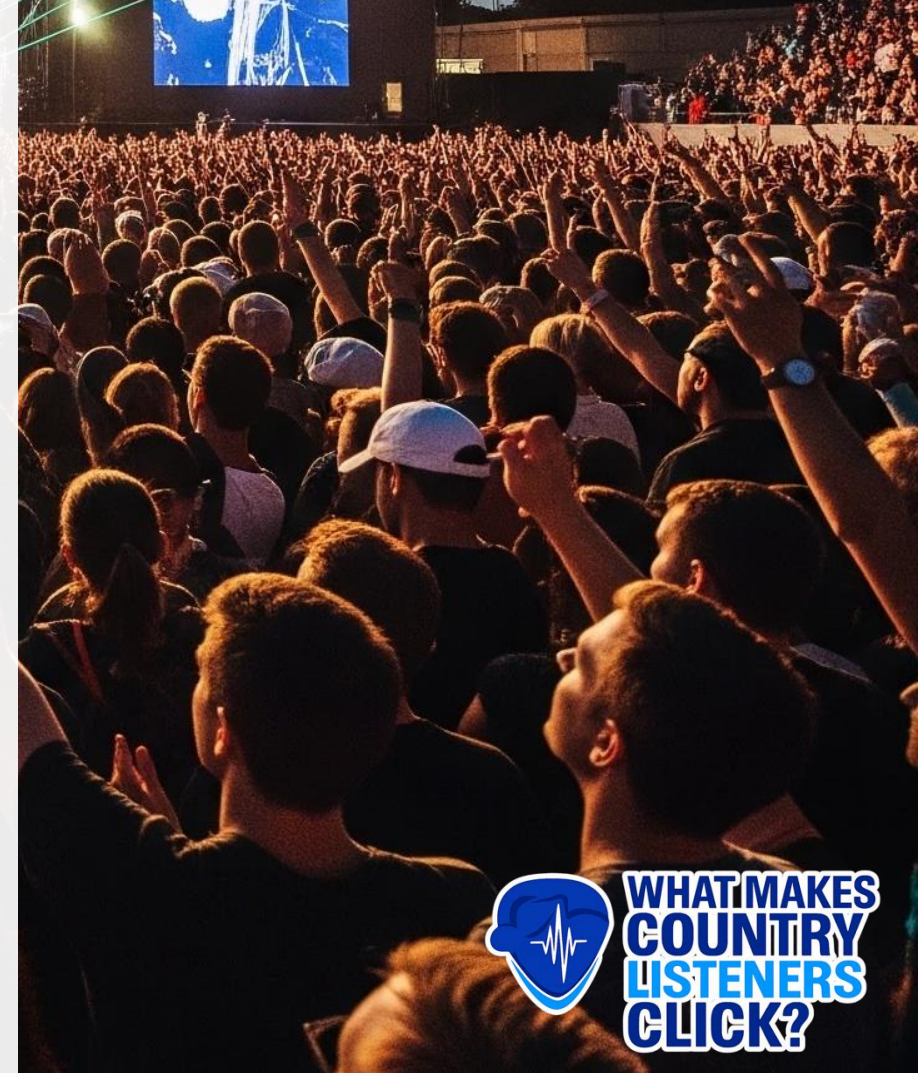


Regionally Distributed



100% Country Music Fans






Country Music 4-5 on 5-point Scale and/or station they listen to most has Country Format





Why They Love Country Music

Open Ended Responses

-  Uplifting & Feel Good **56%**
-  Storytelling & Relatable Lyrics **46%**
-  Emotional Connection **39%**
-  Nostalgia & Memories **23%**
-  Connection to Roots, Identity & Community **11%**



Country Music Loyalty

Nearly 2/3 listen most to Country but only 16% listen exclusively.



Fan of Country Music

60% said they've been a fan of Country Music for MORE than 10 years.

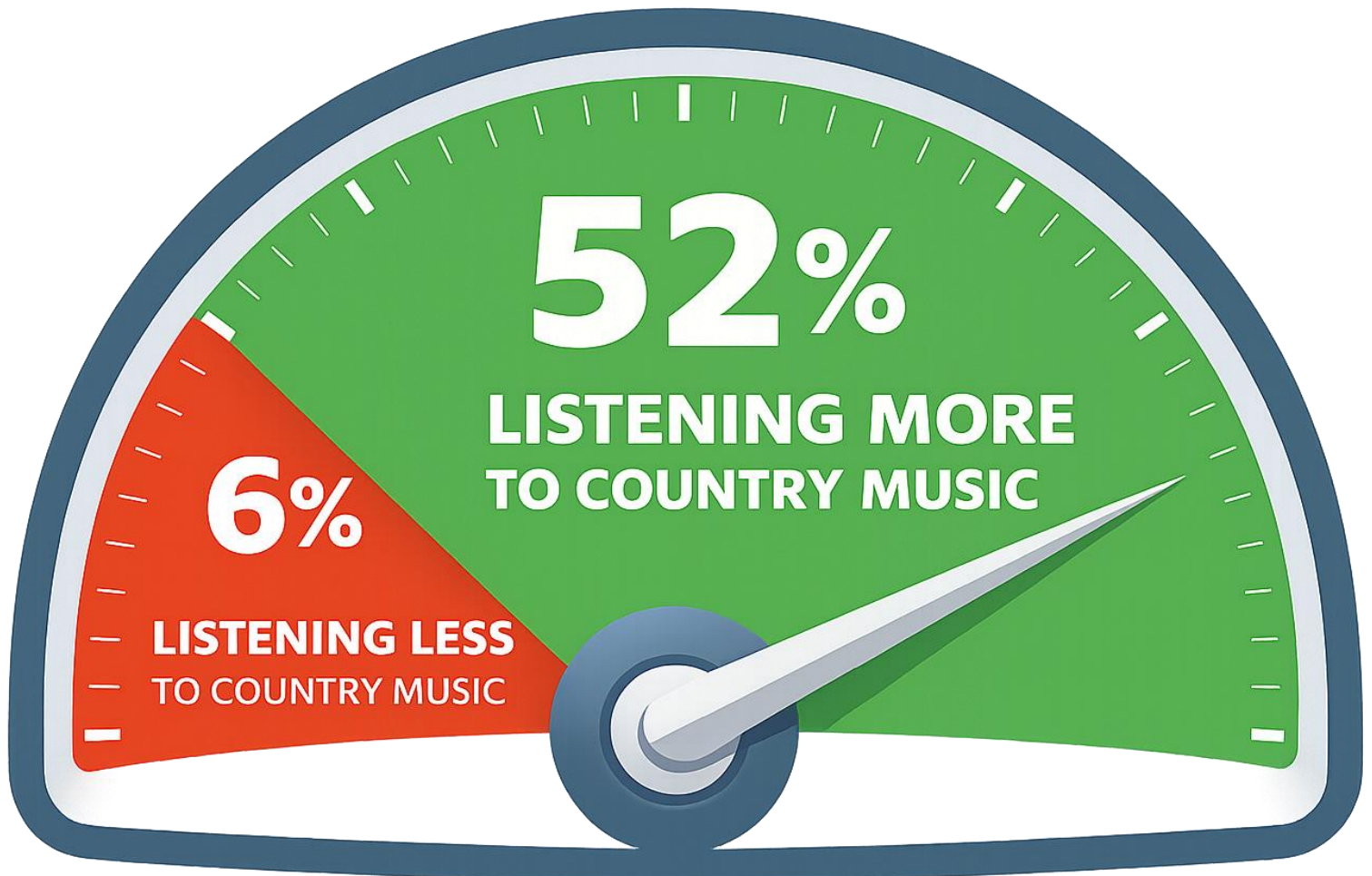
Country Music Engagement

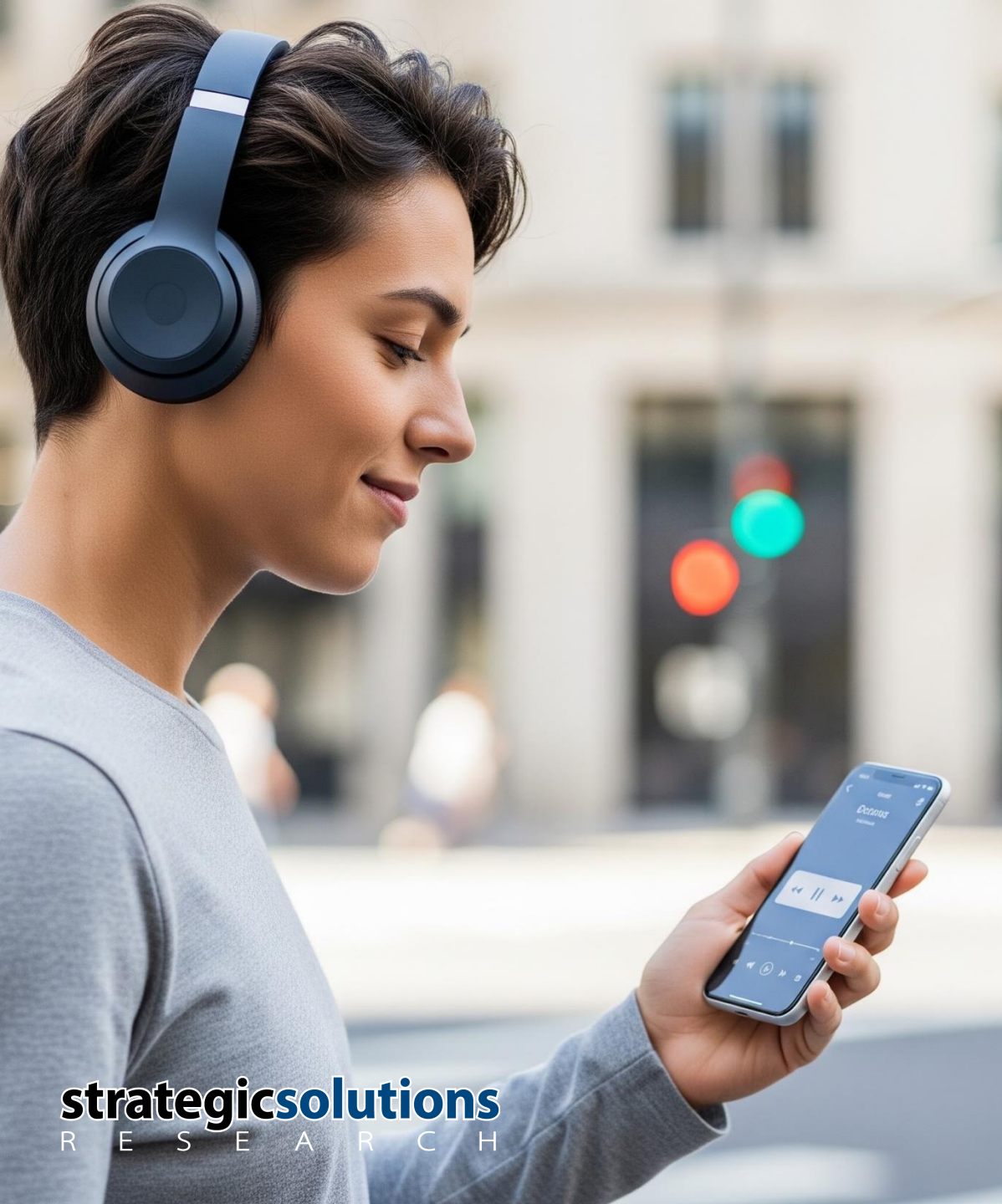


Country Music Identity




54% said Country Music is a major part of their identity.

Momentum





Radio users are also Streaming Country!

-  Streaming Services **79%**
-  YouTube **70%**
-  Social Media **41%**
 - Own Music Collection **35%**
 - TikTok **32%**
 - Country Music TV **31%**
 - SiriusXM **19%**

How They Listen To Country Music (other than radio)

	18-24	25-34	35-44	45-54	MALE	FEMALE
Streaming Services	84%	80%	77%	77%	80%	79%
YouTube	63%	69%	79%	69%	74%	67%
Social Media	50%	45%	41%	32%	45%	37%
Own Music Collection	24%	33%	38%	40%	37%	33%
TikTok	46%	34%	30%	23%	32%	32%
Country Music TV	22%	32%	35%	30%	35%	26%
SiriusXM	13%	20%	21%	21%	22%	17%



Streaming Country Music



Spotify Leads

45% use Spotify most, followed by Pandora (21%), Apple Music (19%).



63% Paid Subscriptions (DSPs)

81% are NOT considering cancelling paid subscriptions



Ad-supported DSPs

76% perceive as many or more commercials compared to local radio

Playlists: Human Curated vs AI-Generated



Listeners prefer playlists curated by humans over AI-generated selections by more than 5:1.

	Human Curated	AI-Generated
18-24	68%	13%
25-34	54%	11%
35-44	54%	11%
45-54	55%	7%
Total	57%	10%



Country Radio

84% listen to Local Country Radio Stations on FM Radio (68% Stream through App on phone)



Country Music P1

38% say their favorite local radio station is a Country music station.

Local Country Radio Listeners



Where are they listening?

42% listen to Country Radio most in their Vehicle (36% listen most at home, only 17% at work)



Favorite Local Radio Station

77% are ambassadors for their favorite local Country radio station



Local Radio's USP vs Streaming

Open Ended Responses



Sense of Community **41%**



Local Personalities **36%** →



Local Connection **31%**

Entertainment & Humor **17%**

Variety of Eras **15%**

Music Discovery **12%**

Contests & Giveaways **9%**

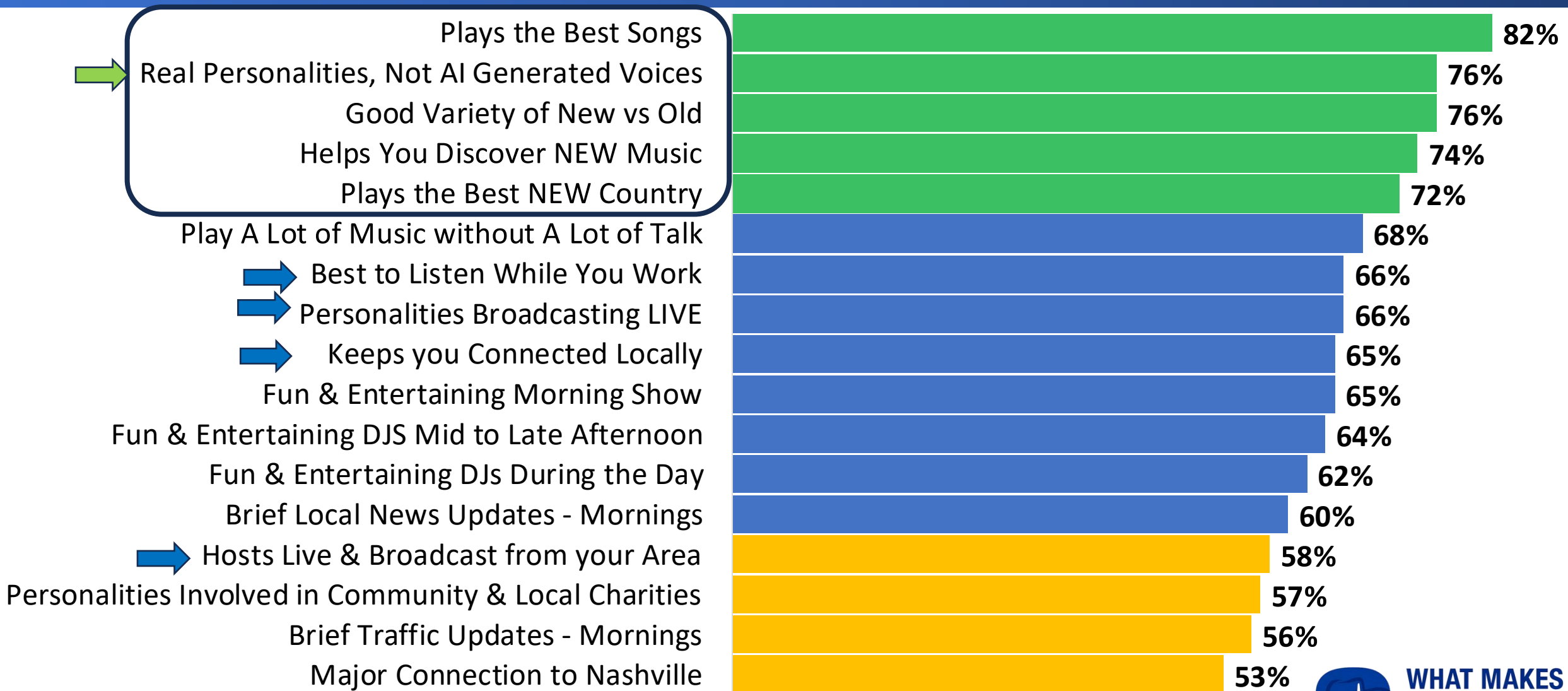
What Listeners Want from Country Radio

Top Rated Features

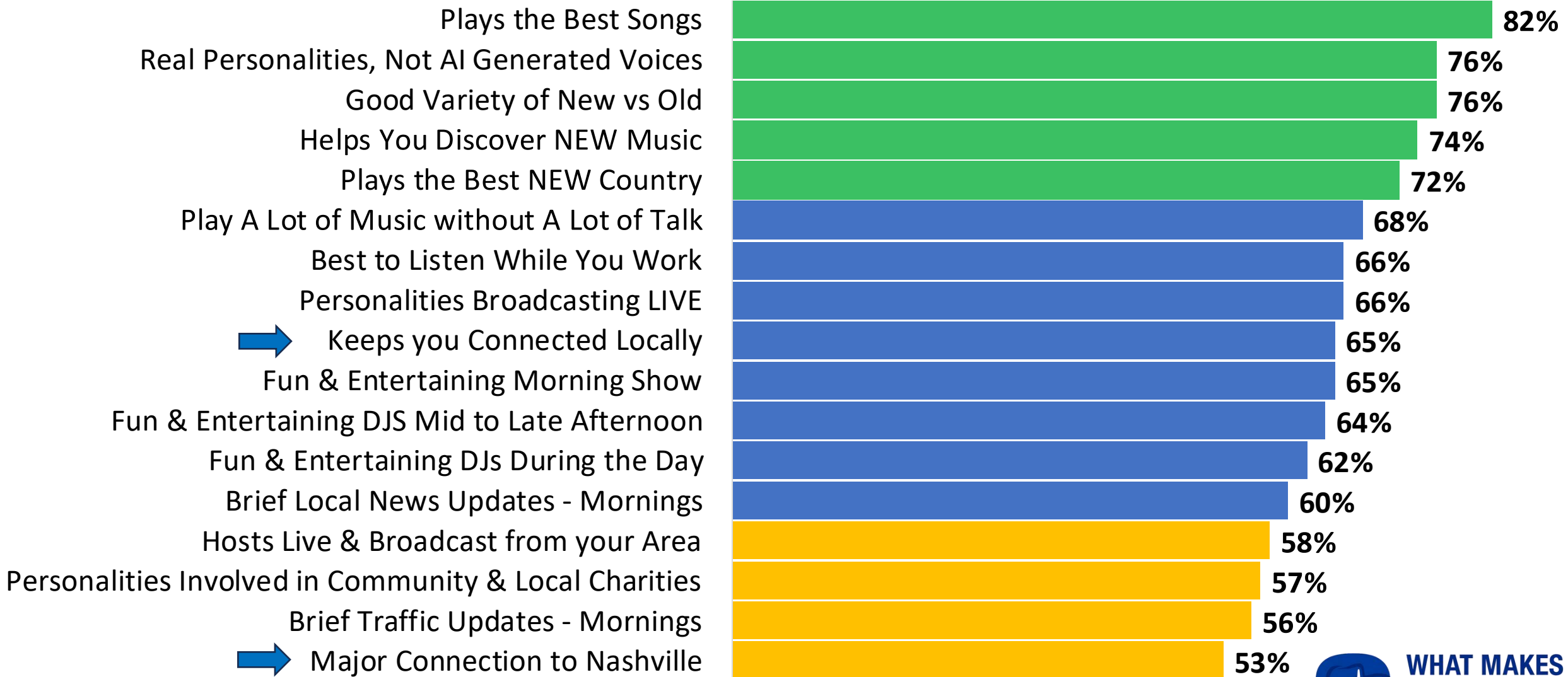
- ★ Plays the Best Songs
- ★ Real Personalities, Not AI Generated Voices
- ★ Good Variety of Newer and Older Country Songs
- ★ Helps You Discover NEW Music
- ★ Plays the Best NEW Country Music



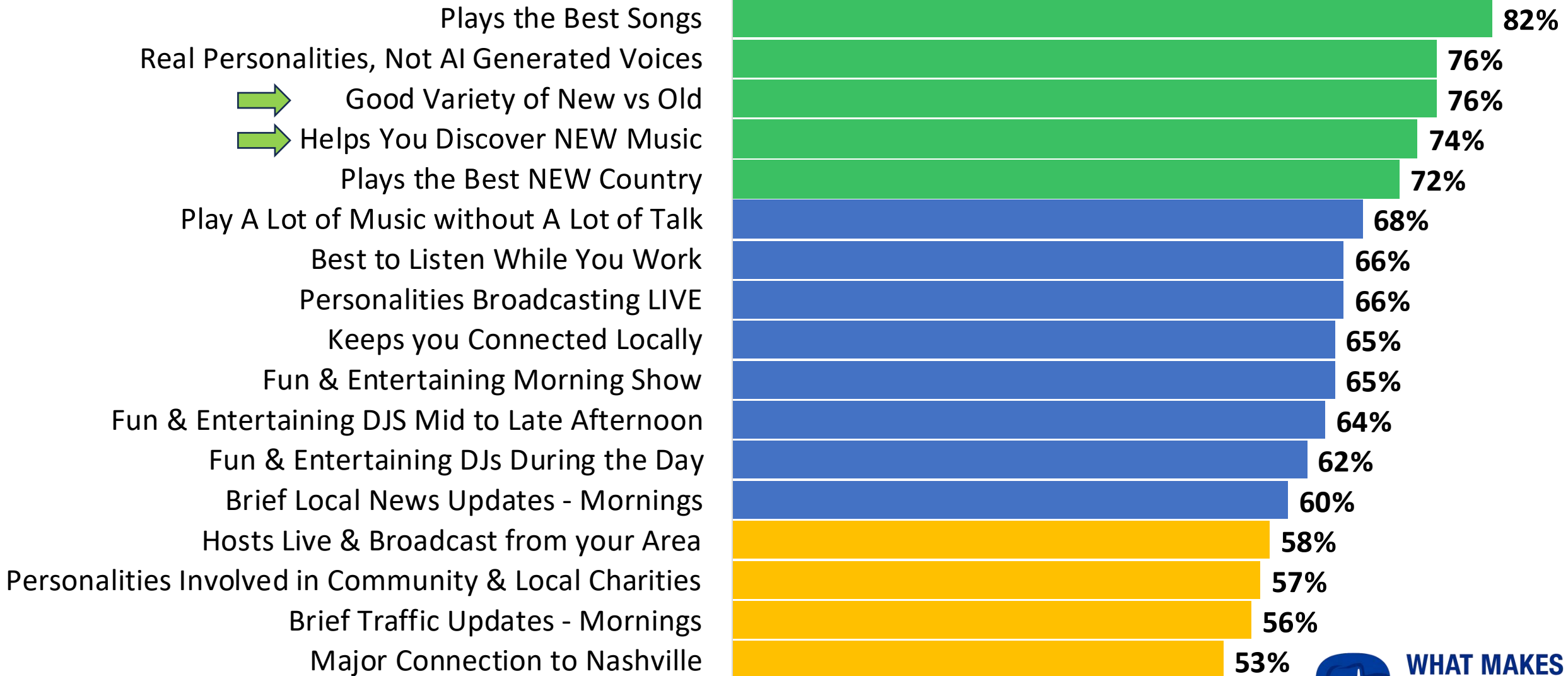
Country Radio - Key Listener Benefits (8-10 Rating)



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Country Radio - Key Listener Benefits (8-10 Rating)





Importance of Radio Personalities



Real/Authentic

Country Radio listeners really value and relate to personalities who sound real and authentic.



Companionship

Personalities are perceived as companions, enhancing the listening experience.








Relatability

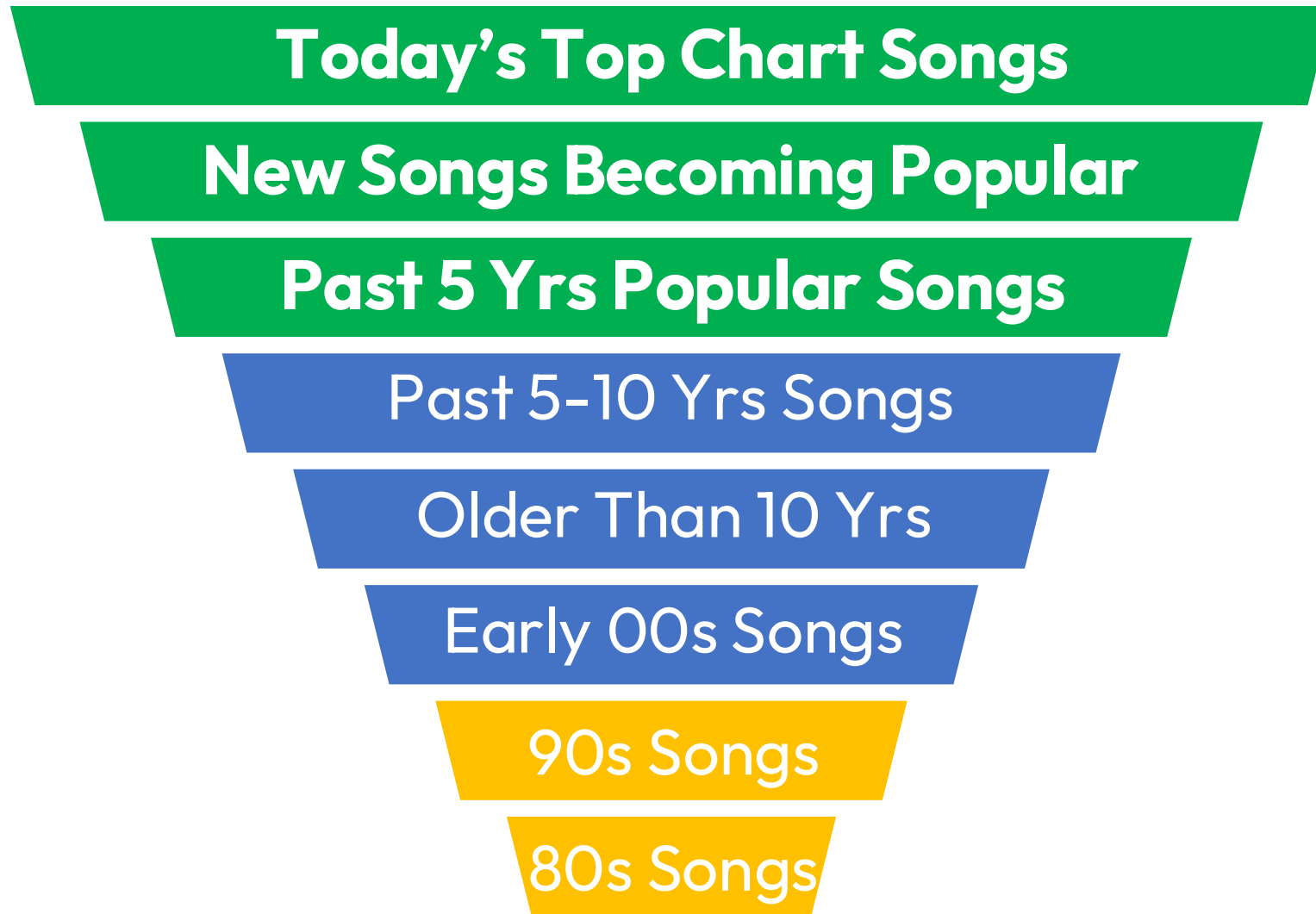
Stations with engaging hosts are seen as more relatable, reinforcing audience connection.



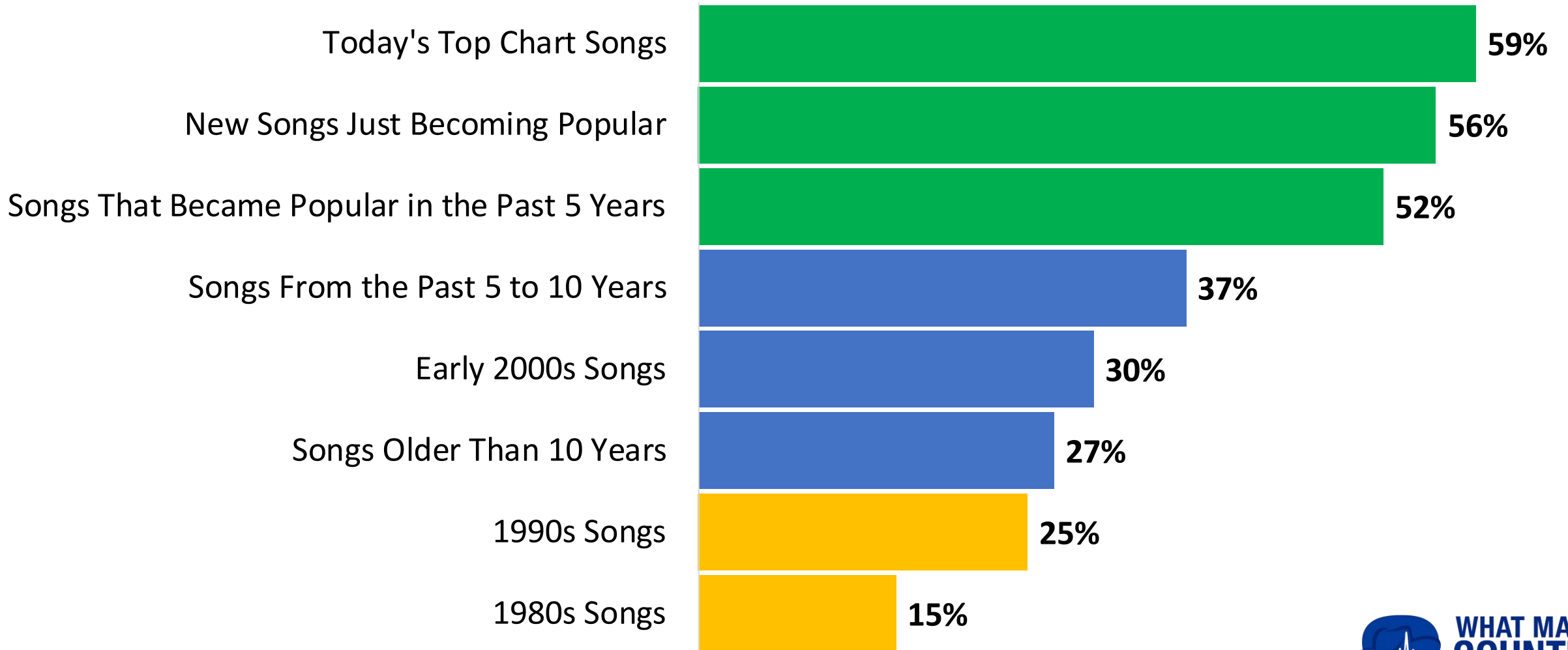
Music Analysis

-  New vs Older Appeal
-  New Music Discovery
-  Collabs
-  Beyonce/Pop Artists
-  Social Media

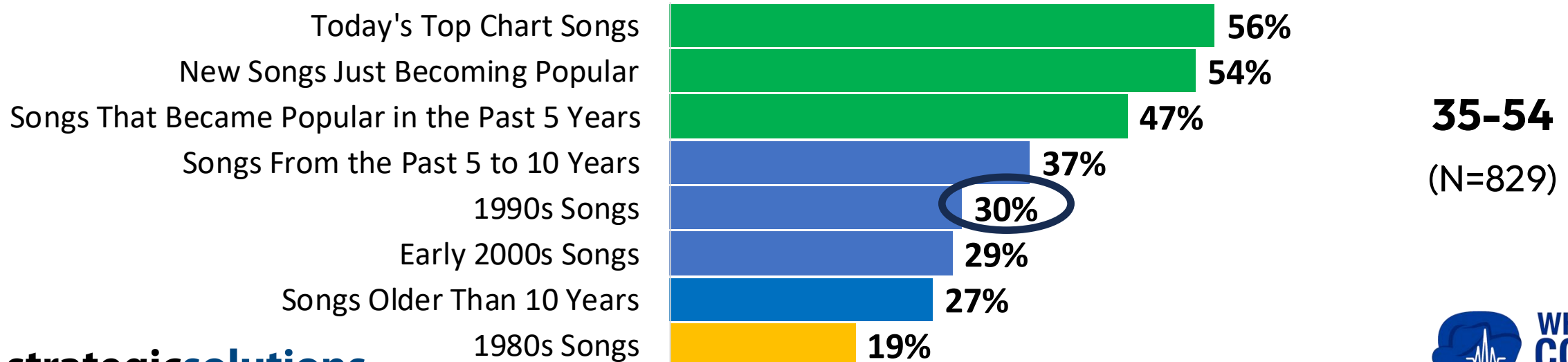
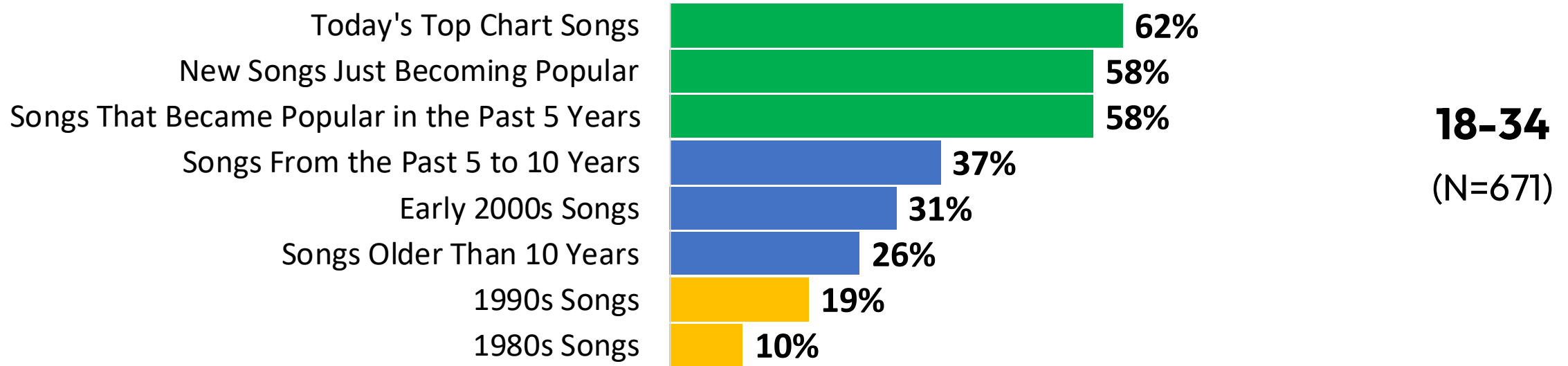
New vs Older Appeal



Country Era Rankings (1-3)



Country Era Rankings (1-3)



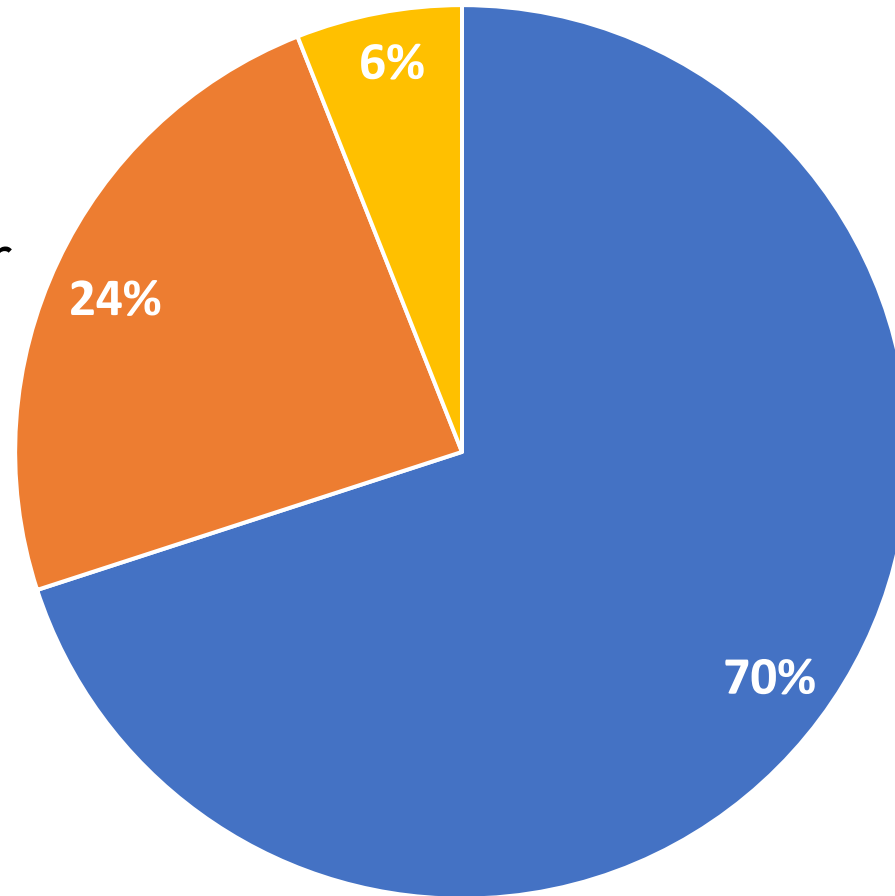
Country Era Fan Groups

Classic Country Fans Only

Top 3 rankings are only older country from 80s to early 00s.

New Country Fans Only

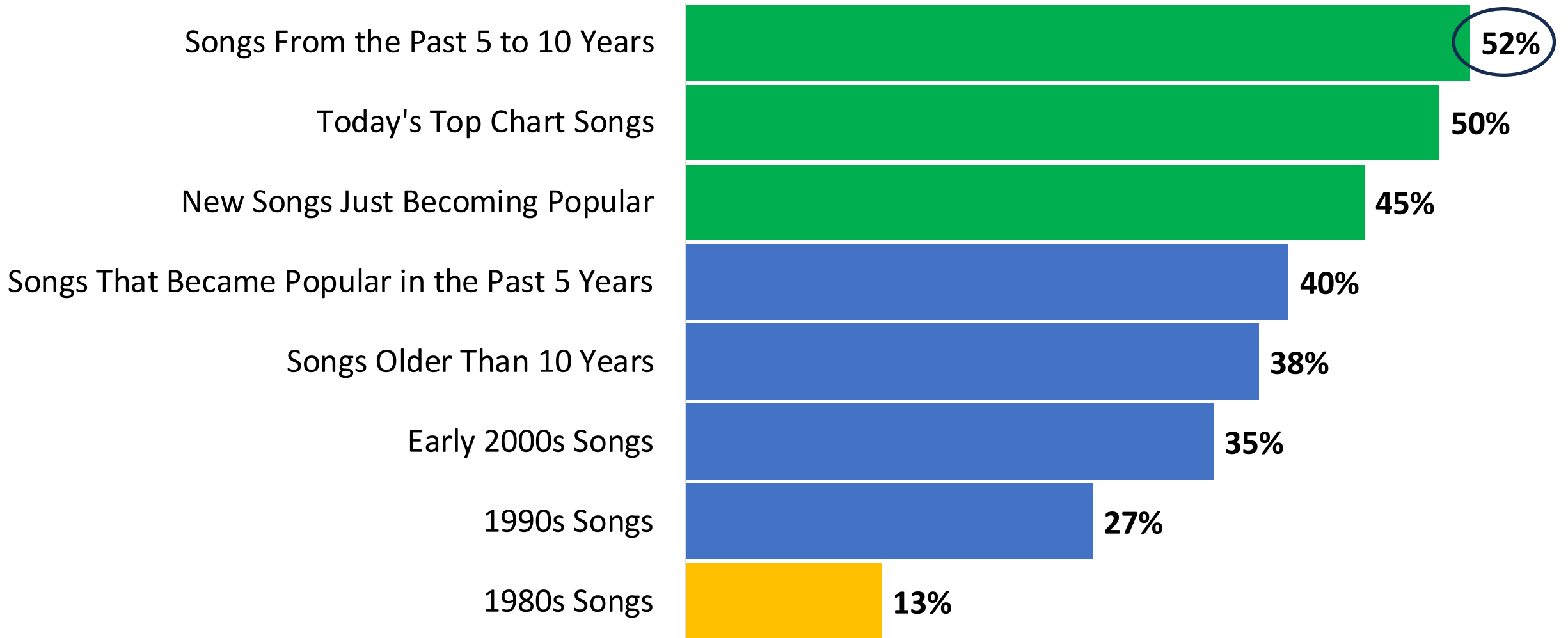
Top 3 rankings are only newer country from the past 5 years and top charts from today.



Spectrum Country Fans

Top 3 rankings include Country from many eras.

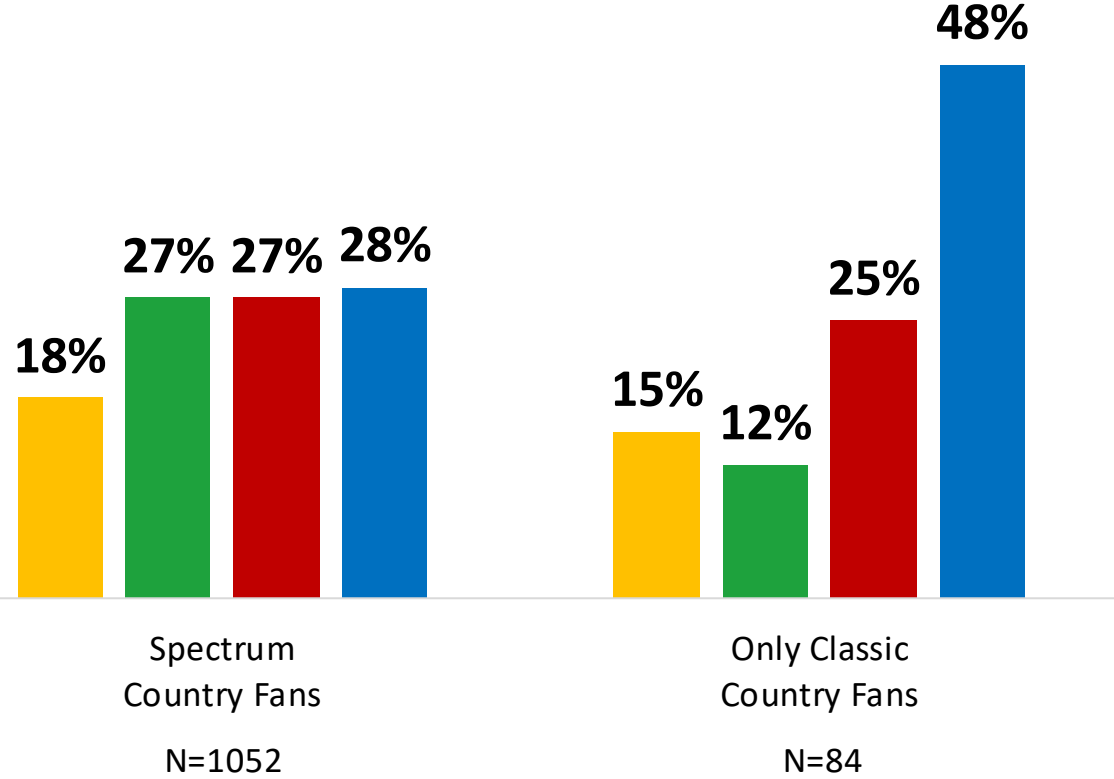
Spectrum Country Fan Rankings (1-3)



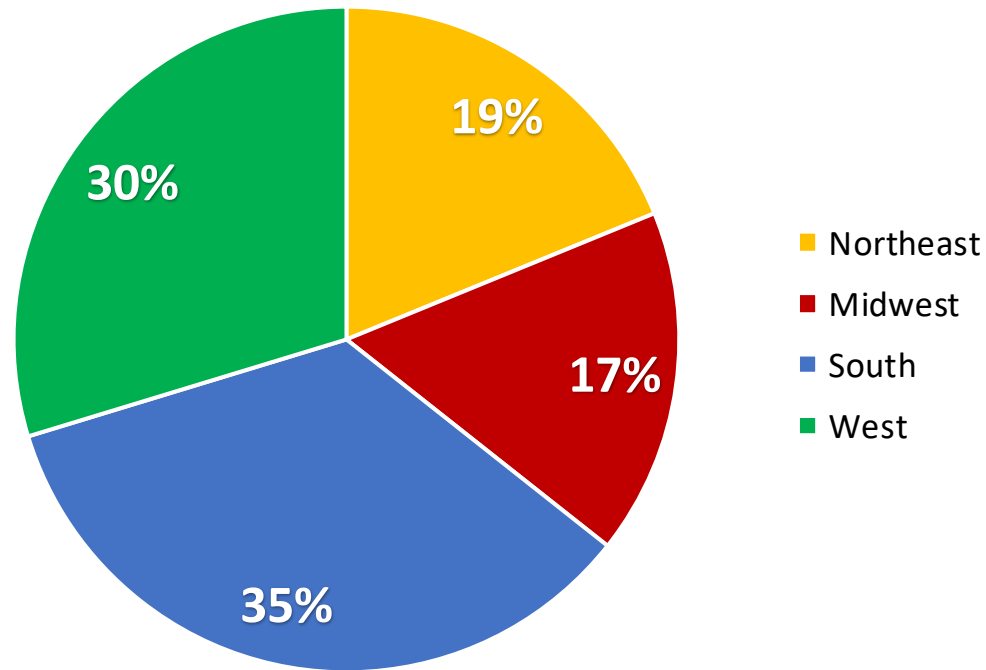
Composition – Spectrum vs Classic

Spectrum vs Classic – Age Composition

18-24 25-34 35-44 45-54

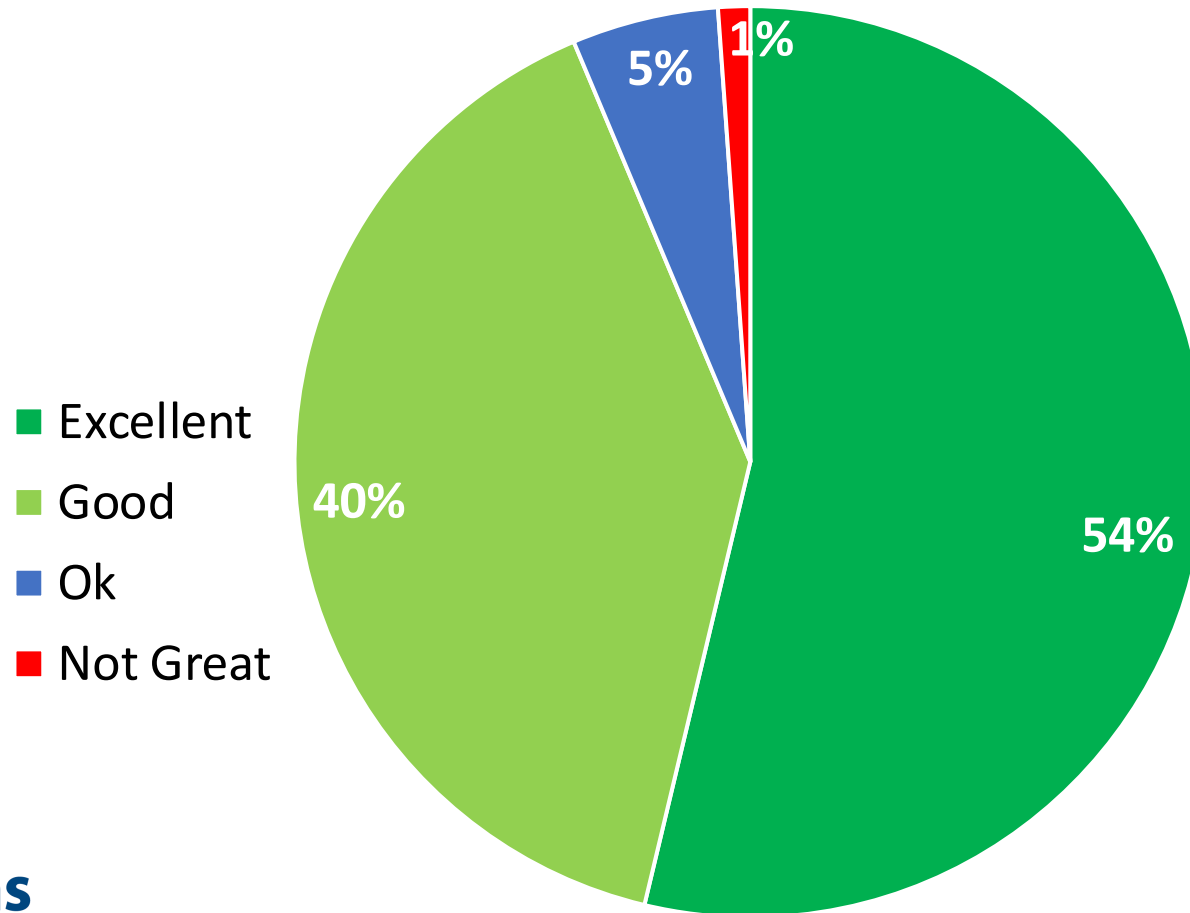


Classic – Region Composition



Music Preferences

94% said their favorite local Country station does an EXCELLENT or GOOD job at playing country music **“Just the way you like it!”**



Music Preferences

Songs that became popular in the past 5 years

Top songs on the charts today

Traditional Sounding Country

Songs from the past 5 to 10 years

New songs just becoming popular

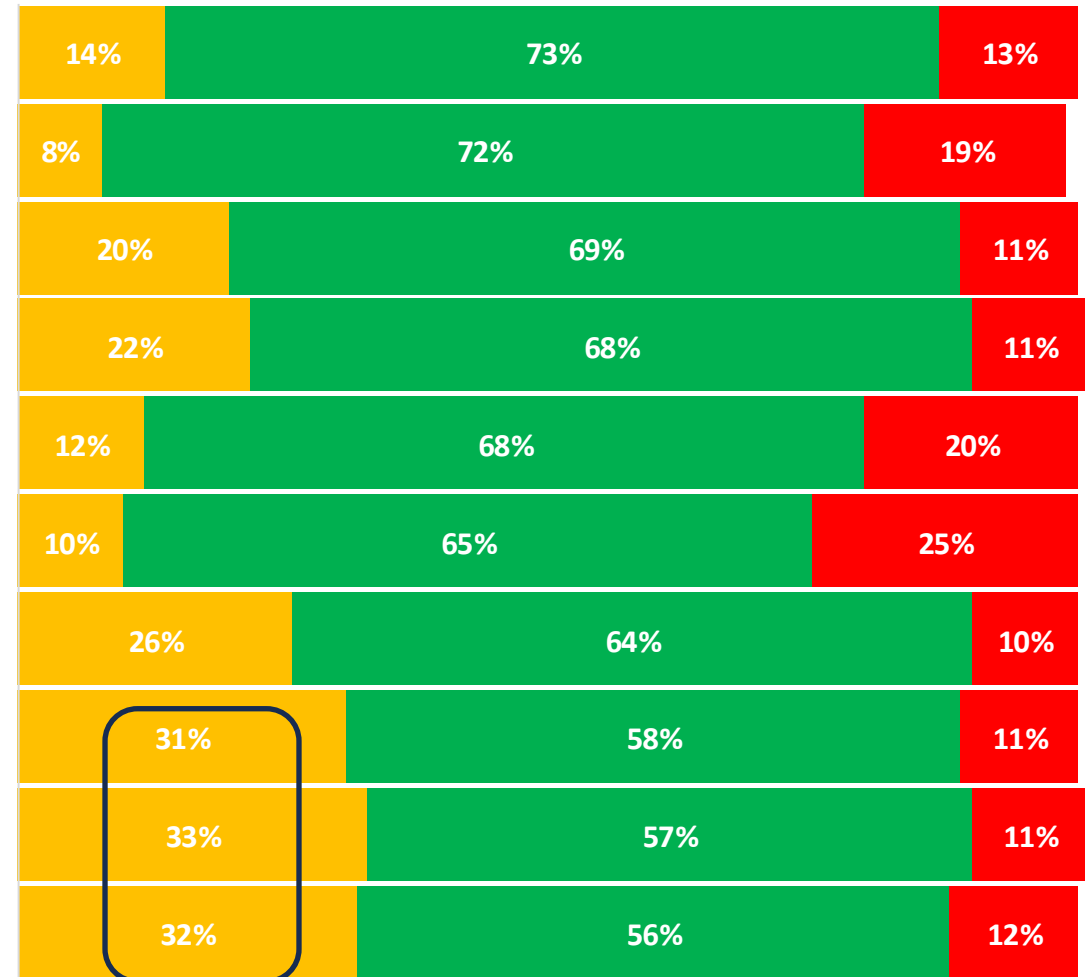
Pop-Country Crossover

Songs from early 2000s

Songs from the 1990s

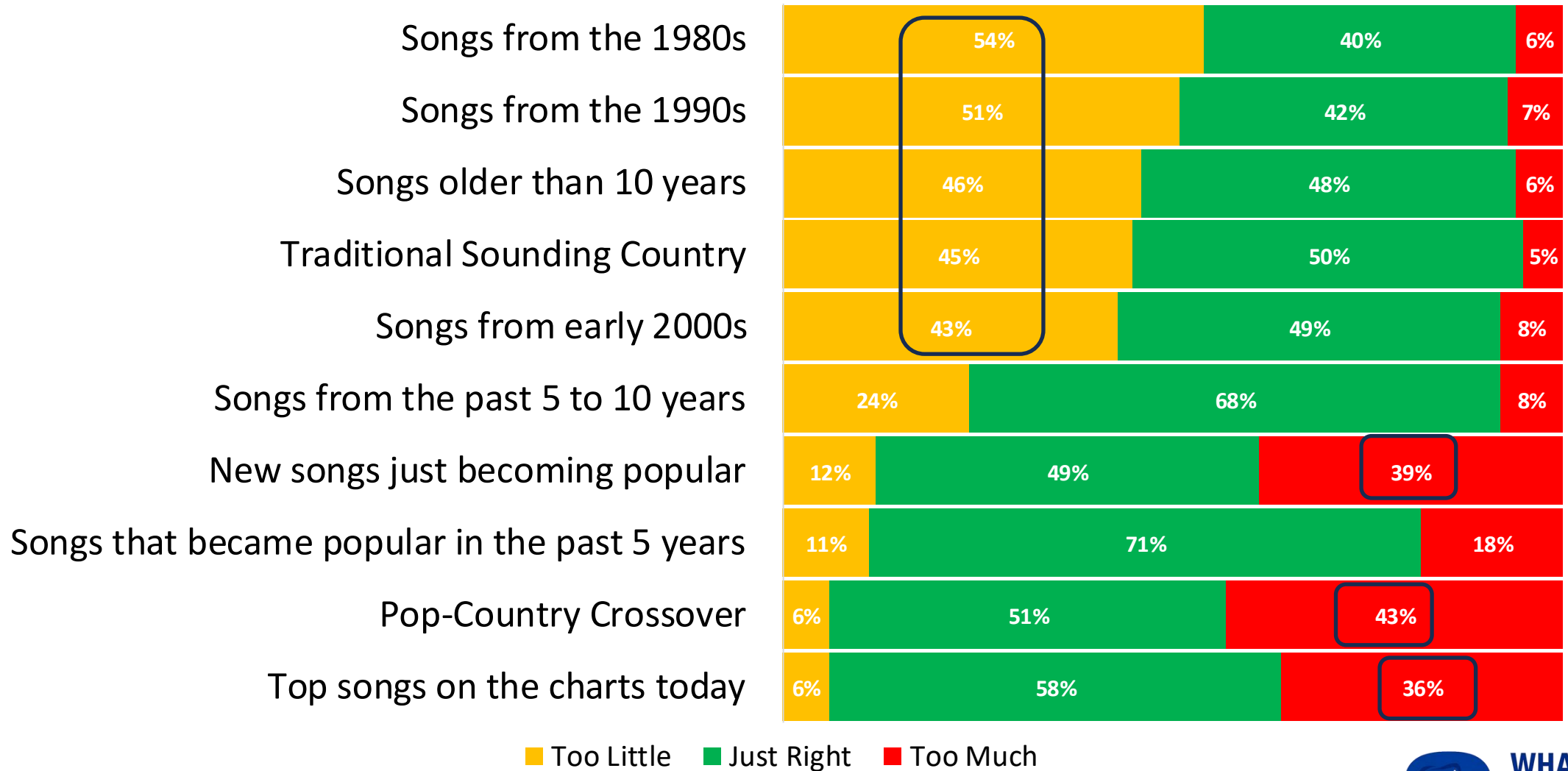
Songs older than 10 years

Songs from the 1980s



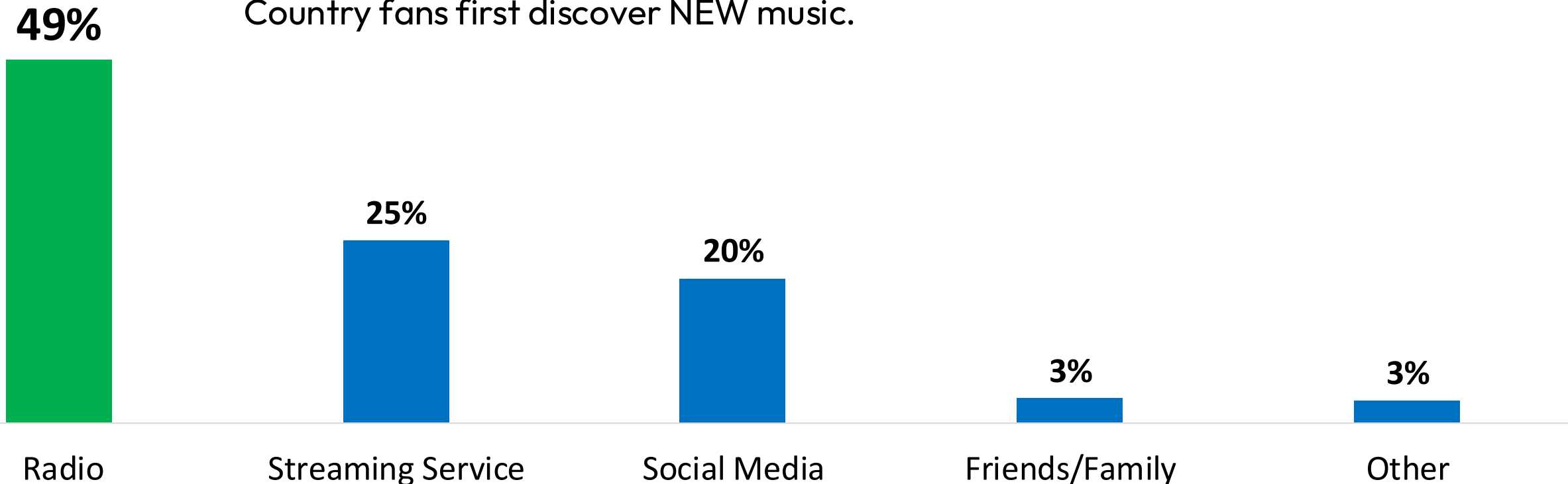
■ Too Little ■ Just Right ■ Too Much

Classic Country Fans Preferences (N=84)



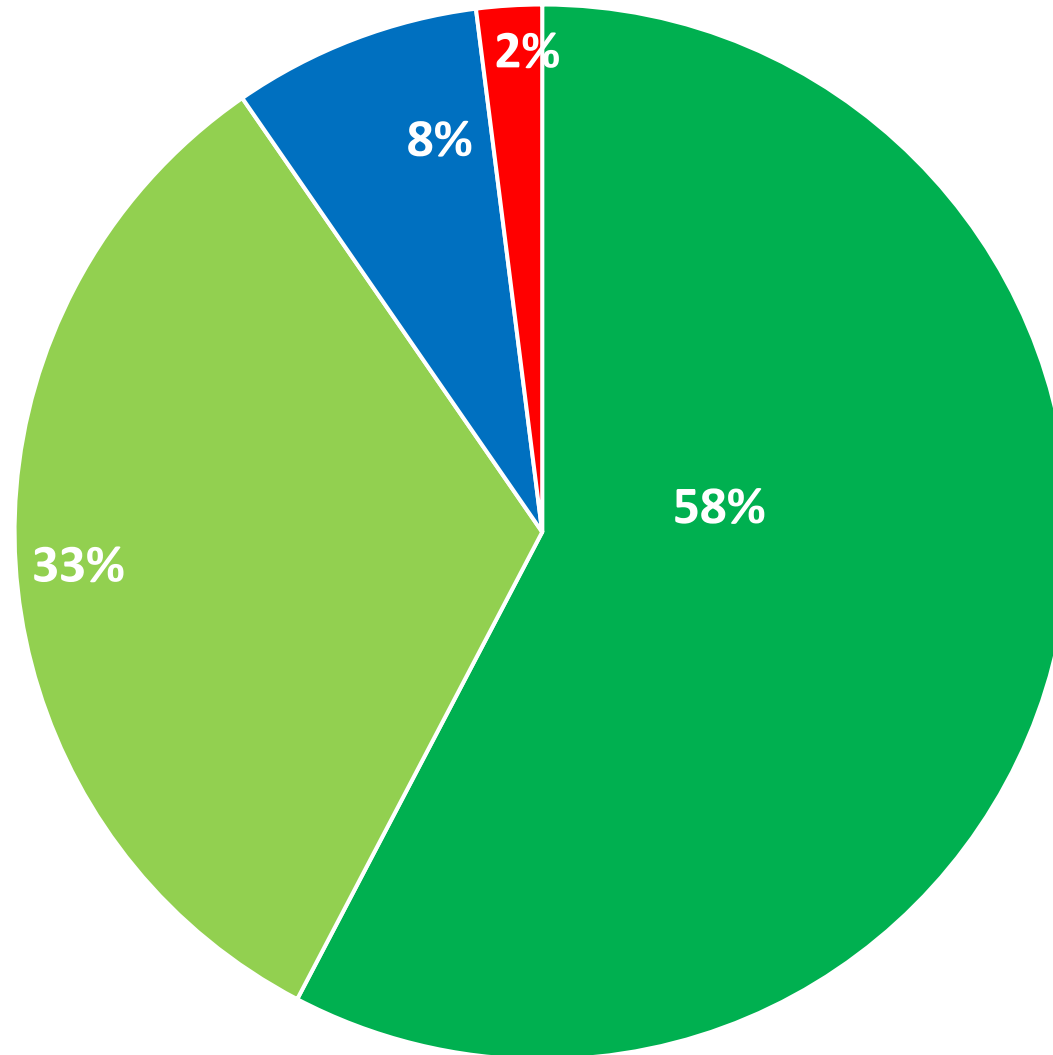
Where fans discover New Music

Radio still has the advantage for where Country fans first discover NEW music.



Top 40 & Country - Collaborations

- Love it!
- Like it - Song by Song Basis
- Neutral
- Don't Like / Hate

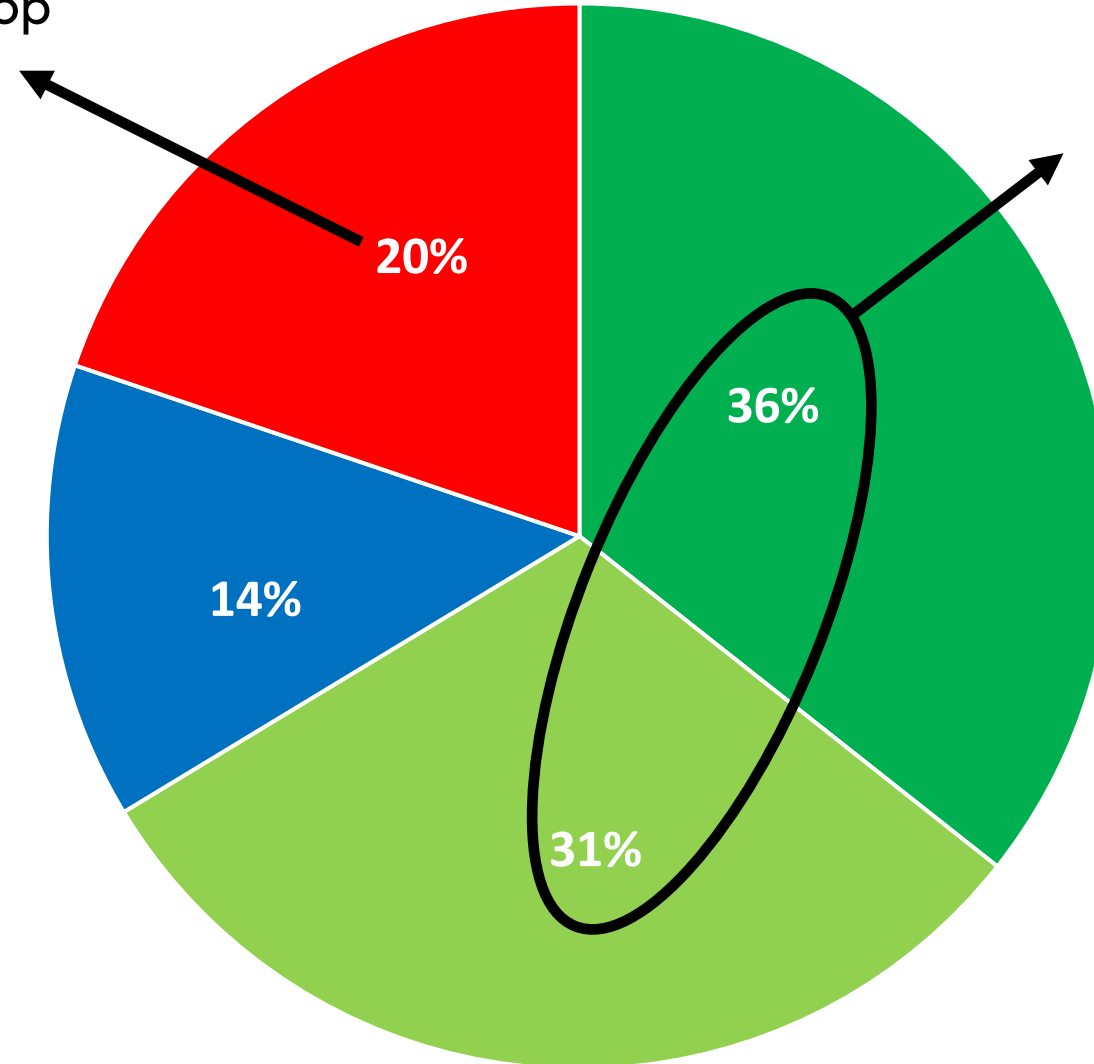


58% LOVE collaborations between Country Artists and Top 40 Artists.

Pop/Beyonce Non-Collaborations

“Stay in your lane...Country should be country and pop should be pop.”

- Ashley, 45



2/3 of Country listeners like Pop artists like Beyonce doing Country but notable that 20% strongly dislike.

- Love it!
- Like it - Song by Song Basis
- Neutral
- Don't Like / Hate

Social Media

My Favorite Local Country Radio Station Plays...

About the RIGHT Amount of Songs from Social Media **60%**

Not Enough **23%**

Too Many **17%**

Contests Engagement

Have Participated **52%**



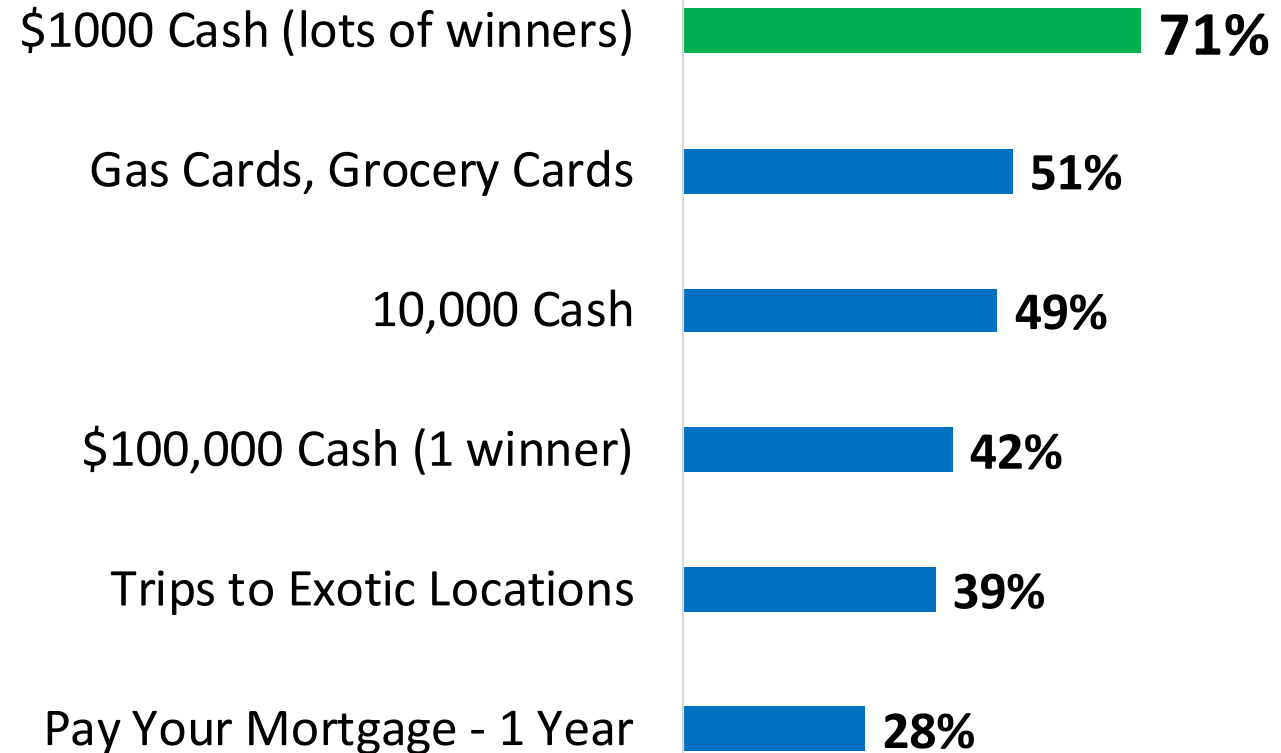
Enjoy Passively **32%**



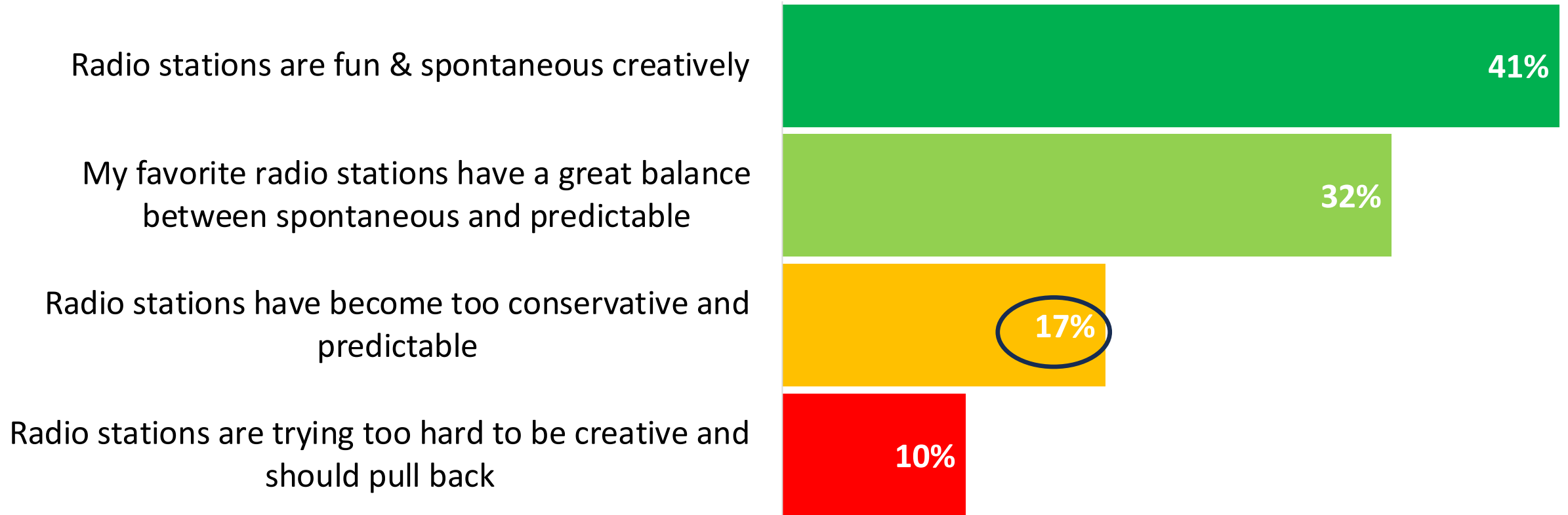
No Influence On Listening **11%**
Dislike/Tune Away **5%**

Prize Appeal

(influence on listening – multiple response)



Is Radio too Predictable?





What They Would Change

About Local Country Radio
Open Ended Responses



More Music Variety **23%**



Less Commercials **20%**



More Contests **15%**



More Classics **15%**

Community Connection **10%**

Listener Interaction **9%**



Summary of Key Points



- 1. Strong Momentum for Country:** Fans are listening more by 10:1.
- 2. Primary Drivers of Country Music:** Uplifting / Feel Good (56%), storytelling/relatability (46%), emotional connection (39%).
- 3. Strong Listener Identity:** Country music is deeply personal; 54% of listeners consider it a major part of their identity, and 60% have been fans for over a decade.
- 4. Streaming Nearly Universal:** Streaming is approaching the level of FM usage as eight out of 10 stream.
- 5. Radio's Unique Value:** Local radio holds a distinct advantage over streaming by providing a sense of community, new music discovery and local personalities.

Summary of Key Points



6. **Where They Listen:** The vehicle is the leading location, but at-home isn't far behind!
7. **Preference for Human Curation:** Fans value the human touch, with 57% preferring playlists curated by people over the 10% who prefer AI-generated selections.
8. **Discovery Advantage:** Despite the rise of social media and streaming, listeners still count on radio most for new music discovery.
9. **Era Preferences:** Current hits, new songs and tracks from the past five years are loved; they like songs from the past 10 years and early 00s. Some would like more older gold.
10. **Authenticity in Talent:** Listeners STRONGLY value real, authentic personalities over AI-generated voices, even more than Live & Local!

Suggested Actions



- 1. Reject AI On-Air Talent:** Double-down on real personalities for companionship and connection.
- 2. Leverage Localism:** Focus programming on content that builds community connection, as this is a top reason fans choose radio over streaming.
- 3. Prioritize App Activations:** The majority of country fans are listening digitally. Remind them of your app's benefits. Huge love for contesting can help fuel downloads/usage.
- 4. Talk About How You Make Them Feel:** Align with the top listener benefit of mood enhancement so you are the go-to source for positive emotional shifts.

Suggested Actions



- 6. Maintain "Spectrum" Playlists:** The essence of the format is contemporary, but there is appetite for gold from the 2000s.
- 7. Embrace Pop/Country Collabs in Moderation:** Give careful scrutiny to songs from pop artists NOT collaborating with a country star.
- 8. Utilize Social Media Trends:** Continue playing songs trending on social media, as 60% of fans feel local stations are currently playing the "right amount" of this content.
- 9. Engage Through Contests:** Contests influence listening behavior even if they don't participate.
- 10. Right-Size Your Contests:** Better to have multiple \$1,000 winners than one \$10,000 prize.

Let's Keep the Conversation Going

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R E S E A R C H

Kevin Cassidy
Hal Rood



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