The numbers are undeniable. An analysis of over 400 Country stations rated by Arbitron in the fall of 2007 shows that almost 55% suffered losses. Perhaps more alarming than the number of stations showing declines was the nature of those declines. Major market stations and many historically Country-dominant markets saw drops of a share point or more. Even more disturbing, a number of legendary Country outlets suffered their lowest 12+ shares in more than a decade. But what does that mean?

Any number of factors could have created an illusion that Country is hemorrhaging listeners or listening levels. Marketplace ratings compression, Arbitron sampling issues and even a loss of young listeners outside Country’s 25-54 target demo are all contributors. (Note: Arbitron only allows trade publications to print 12+ shares.) Of course, there could be more ominous forces at work as well. Has AC’s all-Christmas format become an intolerable poison for Country ratings? Has Country’s playlist squeeze finally caught up with the format? Are we looking at a format stagnation similar to the trough that preceded the 1989 Country boom? Are budgetary assaults on programming, promotions and marketing marginalizing the format and the appeal of terrestrial radio in general?

Unfortunately, there are no easy answers to these questions. All of the above issues could be at work – or none of them. And it probably varies market by market. But with so many stations down, and many of them by such unexpected margins, we turned to local programmers on both sides of the ratings seesaw as well as national programming experts for their perspective on Country’s fall(ing) ratings: Mountain or molehill?
Polarizing The Audience

Albright & O’Mally’s Jaye Albright is proof of the fact that 95% of the stations with full books did very well. She lays a lot of the responsibility for lackluster ratings on programmers who don’t take enough care in music scheduling. “The polarity in tastes between male country music fans and female listeners is greater right now than it’s ever been,” she says. “Women like it newer and are more open to ballads and songs by females, whereas men want their country more familiar, more gold-based and are tolerant of only a very small number of songs by women artists. Careful selection and scheduling plays a huge role in keeping all sides of the lifegroup tuned to your station, and it seems to me that the stations that didn’t do as well may not have researched these issues, due to budget cuts.”

As for new music integration, Albright notes, “Our research is showing that stations that can’t get their music to break those great songs that can’t get on the station. It was good diary placement and the stations getting back to doing what they wanted this it to be about. That’s tough sometimes with all the pressure stations are facing these days. Some stations get derailed when budgets get cut. In competitive situations, it was finding one or two things that made our stations stand out and be really different in a better way from their competitors.”

He adds that budget cuts are slicing more and more into muscle and bone. “Short-term thinking is catching up with some stations as companies are not investing in their product. Generally, if I’m involved, it means there’s a commitment to the product and, thankfully, more often than not, good things happen when there is support for the product. Radio [companies] go private will cause short-term pain (firings, cutbacks), but long-term gains as radio can once again operate out of the public eye and make the investment needed to bring it into the 21st century.”

Casting an ear to stations’ music, Raab says, “With so much of our music being shared on other formats, it’s imperative that we embrace those great songs that can’t be played on other formats. It was help if the ‘next big thing’ comes less audience interaction than in the past, as well. And, when I do hear it, it is so quick and impersonal that it seems like the goal of the personality was to get the phone call over with. We wouldn’t speak like this to a real person at a restaurant or shopping mall, but for some reason we do on the radio. Part of the reason for this is the lack of talent-coaching the personalities are receiving. Many tell me they’ve gone several months – years, in some cases – since their last coaching session. Could you imagine how a basketball or football team would perform under this scenario? Even with strong coaching it isn’t easy to connect with today’s radio user.”

“If ‘live’ talent is too homogenous and mechanical for Wright, you know he has some thoughts on voice-tracking. “A lot of the voice-tracking I hear on Country radio is very bland and mechanical. Most voice trackers sound like they are suffering badly from the negative byproducts of repetition – the things we say the most out sounding bored and uninspired. Making matters worse, these things are usually the most important things we need to sell and communicate – like frequency and call-letters, important promotions, station events, weather, etc.”

Marketing Matters, Too

Both Albright and Wright felt that marketing – or, perhaps more accurately, the lack of it – plays a major role in a station’s success or failure. Says Wright, “It’s disturbing to see how often listeners are not hearing as many innovative ideas coming from competitors.” And, when I do hear it, it is so quick and impersonal that it seems like the goal of the personality was to get the phone call over with. We wouldn’t speak like this to a real person at a restaurant or shopping mall, but for some reason we do on the radio. Part of the reason for this is the lack of talent-coaching the personalities are receiving. Many tell me they’ve gone several months – years, in some cases – since their last coaching session. Could you imagine how a basketball or football team would perform under this scenario? Even with strong coaching it isn’t easy to connect with today’s radio user.”

Wright also believes programmers can improve their station’s sound by realigning the music rotation patterns. “In our effort to not burn out a song, we often don’t suf- ficiently burn it in,” he says. “And, we rarely play it enough after it becomes an audience favorite. Many PDs and MDs think the audience is hearing their favorite songs often enough, when in fact they are not. If PDs and MDs laid out a grid that showed when a big hit song was played throughout the week and laid a transparency over it that showed the average listener’s usage pattern, they’d be alarmed at how often listeners are not hearing that song. This, along with better catalog music management, would help in the music arena. The average person wants to hear their favorite song three-four times per day. Remember, they don’t care how many times you played it. They only care about the number of times they heard it.”
McVay Surveys Country’s Fall Landscape

Mountain Or Molehill?

McVay Media President Mike McVay is perhaps best-known for his work with AC and Hot AC radio stations, artists and syndicators around the world. But he’s also been a keen observer of the Country condition. We asked McVay if Country’s troubles are of the “Mountain” or “Molehill” variety.

“I don’t believe the Country format is in trouble, but rather is a victim of circumstances. The radio landscape has changed and Country needs to change with it.

“Country radio has become more female-leaning in the past few years. The sharing that I’ve been seeing with AC stations has been growing. This is mostly a direct result of the format now being the home of the singer/songwriter. AC is also no longer a format where you’ll find much pop music. Carrie Underwood is this generation’s Carly Simon. Tim McGraw is James Taylor. Country also has the world’s version of pop-versus-Top 40.

The format is similar to being a Top 40. When pop formats like Top 40 lose TSL, it’s usually because of current repetition (playing the same currents too frequently) or simply playing bad music.

“Country programmers should not panic, but be conscious of the fact that they’re now programming a mass appeal format. They need to analyze everything they’re doing. Make small adjustments to increase the core’s TSL (more variety of their favorites). Increase the use of their station among P2 and P3 listeners (better music and better content). Steal a word from the Internet word and make your station “sticky” (contests and compelling stories) and you’ll see a rebound in the spring.”

Asked what he thinks of ever-tightening Country current playlists, McVay responded, “I’d say it’s a bad thing for the lighter than normal current rotations. That’s what I was referring to when I noted that Country has become a Top 40 format. In reality, it should be more like a Hot AC than a Top 40. Country is targeting adults, right? Country has a national TSL that’s higher than that of Top 40 – almost double. So why would anyone think that turning over currents like a Top 40 makes sense?”

marketing. It’s as important as the electricity that powers the transmitter if you want long-term ratings success. Current is down at many radio stations, and marketing is the engine that drives current. Without marketing, you slowly lose the brand awareness that you’ve worked so hard for. If radio would reactivate their marketing and develop strong appointment-listening campaigns, it would assure them of higher ratings. If you could convince just 50% of your weekly diaryholders to simply listen on three or four more occasions that week, it is a mathematical certainty that you’d see significant ratings increases in nearly all demos.

“Narrowing down the numbers like this really helps the personality focus on an achievable goal instead of thinking, ‘Man, how am I going to convince all of these people (the station came) to listen and listen more often.’ Instead, they can focus on convincing 10-15 people to come back to the radio station on a few more occasions. Each time I share this with a personality, their eyes light up and they feel much more confident because they know it is something they can actually do.”

Adds Albright, “Stations trying to compete in very fragmented and highly niched situations without marketing are going to war with no weapons.”

Fall, By The Numbers

The newly released National Format Averages study done by Katz Media Group paints a disturbing picture when compared to Country’s past. KMG’s analysis of the fall 2007 Arbitron share the format levels at 17-year lows for Men and Women 25-54. Men come in at seven hours 21 minutes per week, down from 11 hours 30 minutes in 1990. Among Adult Women, TSL is at six hours 33 minutes, down from 10 hours 29 minutes in fall 1990.

The fall 2007 Average Market Format Shares shows Country declining from a fall ’06 14.9 to 14.3, the lowest since 2003. And, it’s down from the high of 18.0 in 1992. The good news is, Country is still No. 1, leading Rock (14.1), AC (13.1), Urban (12.6) and News/Talk/Info (10.9) in the broad format categories that achieved double digits. For the first time since KMG began compiling stats, the Average Age of the Country listener has reached 45 years old. This comes after eight years of being either 43 or 44 years old, and up from a 1993 and 1994 low of 36 years old. The format is now 58% Women, 45% Men.

Mountain Or Molehill?

So, which is it for Country – a ratings blip that can be fixed or an irreversible downward trend? The answer may depend on whether you’re climbing the hill or sitting on top of it. An established brand, a heritage station that has been winning for years, might be able to remain atop the market, albeit with reduced shares as the 12+ is eaten away by market compression. Paying closer attention to the things you can control – music rotations, talent coaching, etc. – can help maintain TSL and stem the tide to a degree. But the budgetary restraints that are outside of a programmer’s control may well, in time, prove to be insurmountable.

Also out of local PD’s hands is the consolidation-driven repositioning of many Country stations. In particular, stations residing in a cluster have shifted to be more female-driven, rather than the traditional 25-54, 50/50 male/female-driven format Country has always been. That’s made the format more vulnerable to one-offs like the All-Christmas Music format.

And, sadly, there are some things happening to great Country stations that are simply tragic. I look at a number of legendary Country outlets and wonder whether it’s even possible to return to greatness when slashed budgets have left so many of them with two live personalities. And, if ratings are the product of how many people listen and how long they listen, how can you increase the cume part of the equation with no marketing and promotion budget?

The bottom-line is, most of the variables out of your control aren’t going to change any time soon. In the end, whether it’s a mountain or a molehill may indeed be up to you. It’s all how you look at it.