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Spring Survey 2014

The life cycle of radio songs

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Many a One-Hit-Wonder has been and gone since the days when "all gut and no research" prompted radio Music Directors to promote or kill a song from their playlist.

Since then, uncountable numbers of qualitative music tests or call-outs have more or less taken over the role of the gut, and today many radio stations use them as their primary navigation tool.

This survey offers a credible alternative to the findings from the qualitative tests, and suggests that real listener reactions hold more resemblance to what gut feeling told us many years ago, than what some qualitative tests have told us ever since.

We know we are sticking our heads out with this survey and that some pros in the industry will find our conclusions challenging to deal with. But with new methodology and new technology we have endeavoured into the field of listener reactions to music with fearlessness in the quest for new knowledge.

Not with a fixed desire to rewrite the rules at all costs, but to revisit and rediscover.

Almost everything we understand today about the life and death of songs on the radio, about burn and "slow starters", about flavour tracks and core artists, genres, daypart separation and so on stems from answers listeners have kindly provided us with over the years.

Our attempt to revisit the field with the wide open eyes of explorers is done without asking any traditional research questions. Instead we have observed real listener behaviour on real radio stations through minute-to-minute ratings data and paired the data with detailed logs from the same stations. It reveals how listeners react to songs. Not what they say they think of them.

The data in this survey comes from all the major CHR and AC radio stations in Scandinavia. Millions of ratings-entries and millions of on-air events have confirmed some of the knowledge already on the table. But they have also provided us with some very interesting new discoveries that point in the opposite direction to what we and everybody else believed to be true.

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Part 1 - The Currents

The majority of formats look for hit Currents to play in order to keep people listening. Some formats play the same Currents every second hour, or in some cases every hour, in prime time. Others rotate them more moderately.

The common denominator is that they expect the Currents to increase time spent listening (TSL) and possibly even cume if they get the mix just right and keep it fresh.

On many types of formats Currents are considered the backbone of the playlist.

The Scandinavian Mix
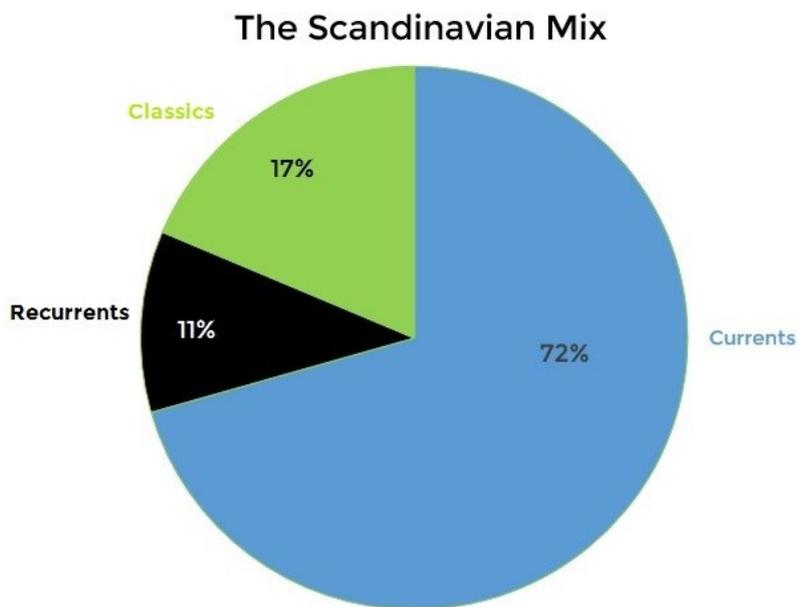
The stations tested in our survey played no fewer than 54598 different tracks in 2013.

By taking into account how many times each song played and sampling the list, we can estimate the proportion of the music mix.

It is obvious that the Currents are the main battleground for all the CHR, and even most AC radio stations.

Methodology applied in this section:

We compiled a top 100 of the most played Currents on major Scandinavian CHR and AC radio stations from March 1st 2013 to Feburary 28th 2014.

We picked 20 songs from the list; the top 10 plus 10 random songs from #11 to #100 and analyzed listener reactions to these 20 songs, month-by-month.

After building the data sheet with reactions to the songs we looked for patterns in the way people react to Currents over a period of time, taking into account how often they played at different times during the test period and how much this influenced their reactions.

Finally we categorized the Currents and were able to conclusively identify a set of dogmas for listener reactions to this type of songs.

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Categories:

Currents that make it into the top 100 on the playlists of major CHR and AC radio stations in Scandinavia can be categorized into three primary groups:

<u>Survivors:</u>

Listeners do not necessarily take an instant liking to these songs, but once they start humming them, they like to listen to them quite often for an extended period of time.

These songs can return positive listener reactions for as long as up to 12 straight weeks, but tend to stagnate on a moderately positive level of reaction.

Passenger "Let Her Go" took a while to settle, then performed at a high level for a whopping 12 weeks before dropping a bit.

The performance then stabilized at a high level as the song was played somewhat less frequently.

"Survivors" are often characterized by having a broad listener appeal in terms of demographics, but are not typically playlisted on the youngest and oldest formats.

They tend to be "less electronic" in nature and predominantly feature "real instruments".

When the songs from this category are given even a short rest they come back stronger than ever in terms of how listeners react to them when they are played.

Examples of songs from this category in our analysis are **Passenger "Let Her Go"** and **Pink featuring Nate Ruess "Just Give Me a Reason"**.

Rockets

When these songs are introduced to the playlist they return very positive reactions instantly and are often put into heavy rotation quicker than other songs.

"Rockets" are only able to maintain a high performance level for a relatively short period of time, dropping rapidly in listener reaction percentages 6-8 weeks after becoming A-rotates.

"Rocket" songs are played everywhere. And played a lot.

Robin Thicke feat. T.I. & Pharell "Blurred Lines" thundered into the charts and listeners immediately reacted positively. However, the positive scores were short-lived and the song was not able to recover in a big way after dropping out of heavy rotation.

These songs often have a vibe of novelty about them.

When "Rockets" are given a rest from heavy rotation they are typically very burnt and usually do not recover well, in terms of listener reaction, for a long time.

Examples of songs from this category in our survey are **Daft Punk feat. Pharell Williams "Get Lucky"** and **Robin Thicke feat. T.I. & Pharell "Blurred Lines"**.

Sliders

Some songs sound like hits, recieve quite a lot of airplay and sell relatively well too. But they do not return positive listener reaction in the way they should.

Sliders (continued)

"Sliders" are often able to generate neutral reactions when they are first playliststed - which is not a bad thing if the station you play it on is in positive development, in terms of cume.

The first months of performance scores were quite good for Justin Timberlake's "Mirrors", but it didn't follow an upward curve and slowly kept losing momentum all the way.

After 6-8 weeks the listener reaction has decreased slightly, not dropping like a stone but not going in the right direction either.

"Sliders" are not usually placed in A-rotation by all stations, but are more likely to be "pet projects" of the Music Directors of the individual stations where they are play-listed heavily. On the majority of stations they don't make it into the highest rotate level.

Usually "Sliders" are by well-known and established artists, but will most likely not be remembered as anywhere near their best work when all is said and done.

Examples of songs from this category in our survey are **Rihanna feat. Mikky Ekko "Stay"** and **Justin Timberlake "Mirrors"**.

Seven dogmas for Currents:

Our analysis of the listener reactions to highly-exposed Currents points in the direction that these general rules apply:

- If heavily-rotated songs fail to perform within 6-8 weeks of being playlisted, they are not likely to perform well in the future.

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Dogmas for Currents (continued)

- Most songs can only handle 6-8 weeks in heavy rotation before dropping in performance. Only the "Survivor" songs are exempt from this rule and can perform for up to 12 weeks.

- Moving a song to a lower rotate, or even temporarily removing it from the playlist, has to be done with both eyes firmly fixed on the total market exposure of a song, not just the specific station's own playlist. If any of the competition in your market has playlisted the song, you can not control the combined burn factor by yourself.

- Most songs will take 3-5 weeks in lower rotations to start performing positively after they are introduced.

- Almost all songs can recover to positive performance if they are given breaks. This includes "Sliders". But they need to be reintroduced very gently, and after a prolonged pause.

- Sales Charts and Airplay Charts look very similar, but Sales Charts and Listener Reaction Charts are nowhere near compatible.

- The most-played tracks are never the ones that return the most positive reaction from listeners, in terms of percentages, simply because listeners are heavily-exposed to these songs everywhere. Nevertheless, an overperformance of just 1% by a top 10 hit can move a lot of market share if, for example, it is played 200 times over a month in dayparts with high cume.

Part 2 - The Classics

There are various selection methods and a range of attitudes as to how much they should play, but Back Catalogue songs usually account for a substantial part of a format.

They are normally divided into Recurrents and Classics in the music selection system, and we have focused this survey on the latter.

This is an area where most stations aim to differ from their competition, picking just the right mix of songs to bring back at just the right time.

Positive Reaction Chart
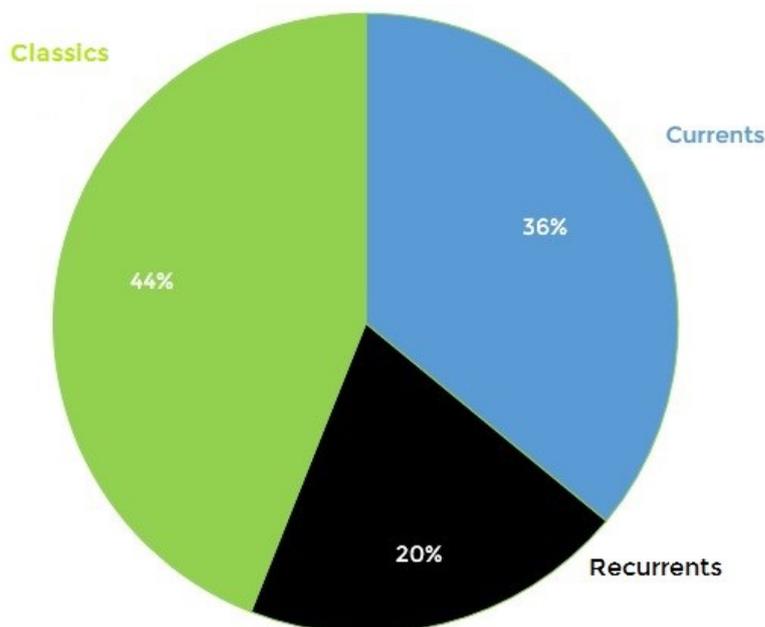
From the first pie chart in this survey you may remember that Classics only account for 17% of average plays on the Scandinavian CHR and AC radio stations .

This chart illustrates that they are extremely important. It categorizes the Top 100 songs which Scandinavian listeners reacted to with the most positive percentages in 2013.

There is a significant overrepresentation of both Classics and Recurrents in the chart.

Methodology applied in this section:

We compiled a top 20 of the most-played songs released prior to 2011 on major Scandinavian CHR and AC radio stations from March 1st 2013 to Feburary 28th 2014.

We analyzed listener reactions to these 20 songs month-by-month in detail.

After building the data sheet with reactions to the songs we looked for patterns in the way listeners react to these well-known songs, taking into consideration how many other stations in the same market were playlisting them simultaneously and how that influenced the reactions. Finally we categorized them and identified a set of dogmas for listener reactions to Classics.

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Categories:

The most-played songs released prior to 2011 featuring in the playlists of major CHR and AC radio stations in Scandinavia can be categorized into three primary groups:

Survivors

These are the tracks that have stood the test of time and will probably also be played a lot in 10 or 20 years time. Most likely they were also Survivors when they were Currents.

All songs that fit into this category were huge hits and are so well-known that most people will know part of, if not all of the lyrics to them.
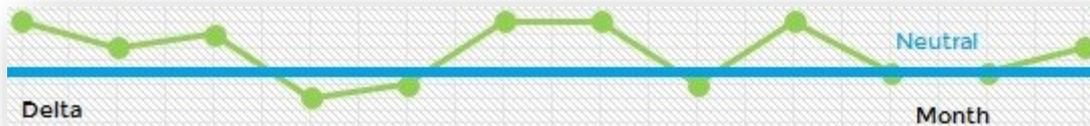
There are very few, and very minor, swings on the Performance Curve for Scorpions "Winds of Change", making it a "Survivor". It is almost unaffected by simultaneous playlisting on multiple stations in the same market.

Imagine a capacity crowd at one of the biggest stadiums on Earth, singing along to a World Superstar concert. The "Survivor" songs are the ones that get the wildest crowd reactions of the night.

Only about half the songs you would expect to fulfill these criteria actually fit into this category, for reasons we are yet to isolate and determine. We require more than one full year of data to fully comprehend how listener reactions to these vintage songs are formed and transformed over time.

Listener reaction to these songs is more or less stable in a moderately-positive manner over a full year, but further research could see them move into another category over time as "the sound of now" changes.

Examples of songs in this category in our survey are **Scorpions "Wind of Change"**, **Michael Jackson "Billie Jean"** and **The Police "Every Breath You Take"**.

Sensitives

The songs that fit into this category sound and feel somewhat like the "Survivors", but most of them are characterized by not quite having the same "legend status" as their "Survivor" counterparts.

Many "Sensitives" were huge hits, but tend to have an aura of "niche" about them or were songs that charted wildly and then burnt terribly when they were Currents.

Songs that fit into this category may perform positively for an extended period of time up to 12 weeks in a row, but if any other station(s) in the market playlist them, or even one individual station starts playing them more often, listener reactions can drop into negative numbers.

"Poison" by Alice Cooper does quite well, in terms of listener reaction, as long as it is not being played too often or simultaneously playlisted on any other stations in the same market. When that happens, performance drops.

Listeners have a decent tolerance towards these songs, but our data suggests that if they hear them more than a couple of times over a month, they may change stations, or even turn the radio off when they are played.

Most "Sensitives" sound a bit "dated", or at least somewhat typical of their era, in terms of sound and feel.

Examples of songs in this category in our survey are **No Doubt "Don't Speak"**, **Alice Cooper "Poison"** and **Queen "I Want To Break Free"**.

Pendulums

These are the kind of songs you hear for the first time in a while and instantly turn the volume up. But probably only once every year. After that they get tired.

Pendulums (continued)

Listener reaction to these songs swings by quite a margin and can return positive results one month followed by negative the next.

The major difference between ”Pendulums” and ”Sensitives” is that ”Pendulums” can swing even when the number of plays is stable. Also, they swing much more up and down the ratings scale.

Huge swings in performance, even though they are not played more or less or playlisted by any other stations characterize songs that act like pendulums.
This one is Beyonce ”Halo”.

WHEN these songs return positive scores, they are usually significantly higher than songs from the other categories, making them a valuable commodity. Unfortunately they also return much more negative results when the pendulum swings to the negative side, highlighting the need to playlist them gently and with great care.

”Pendulums” are songs you remember well and that you either have fond memories of or remember hating at the time they charted.

These songs tend to be very typical of their time. They were not necessarily novelty songs when they charted, but may feel like novelty songs now.

Examples of songs that in this category in our survey are **Bon Jovi ”Living On A Prayer”** and **Beyonce ”Halo”**.

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Seven dogmas for Classics:

Our analysis of the listener reactions to the 20 most-played songs released prior to 2011 on major Scandinavian CHR and AC stations indicates that these general rules apply:

- Listener taste in Classics is not as stable as one would like to think. Thus, songs can jump from one category to another over a short timespan. There appear to be especially be fluid lines between the "Survivors" and the "Sensitives".

- Only the songs from the "Survivor" category can perform consistantly for more than 12 weeks in a row.

- Ensuring the selection of Classics on a format feel right and sound good is not sufficient to ensure success with the Back Catalogue. Intense market surveillance is necessary to avoid songs from dropping rapidly in listener reaction percentages when the competition pick up "your tracks".

- More than three quarters of the playlisted Classics are rock-oriented songs, but it is actually the pop-oriented songs that bring about the most significant positive reactions from listeners. This overrepresentation of rock-oriented songs is in complete disharmony with how the genres are represented in the Current and Recurrent categories.

- External factors such as other artists performing a cover of the song on a TV show or the song itself being featured in a movie, TV commercial or TV programme can tip the scales in either a positive and a negative direction.

- There is no consistancy in listener performance to certain years or even 5-year periods, but songs from the late 80's and early 90's currently seem to have the upper hand.

- Songs that are percieved as "silly", "very niche" or "out of context" return the best reactions of all Classics when included in the playlist for a short period of time. After that they return horrible reactions. Check out which Classic returned the best percentage in Scandinavia in 2013 on the last page of this survey. Probably not the bookmaker's favourite for the title.

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The lowdown on the life cycle of radio songs:

With this survey we believe we can determine that, in general, listener taste is **very fluid, fast moving, highly organic** and can be affected by an amazing range of factors that all need to be taken into account when determining what makes the life cycle(s) of a song.

The survey seems to suggest that the saying "radio people get tired of new songs quicker than listeners" is only partially correct, because many radio stations have the best-selling and best qualitatively-testing songs in heavy rotate for 5 months or more. Our data analysis suggests that only the "Survivor" Currents stand a chance of generating positive reactions over such a long period. All other Currents **will perform negatively towards the end of a 5-month period and beyond**.

The solution for some stations could be to **adjust the rotate-intensity** of a song frequently in order to rest it "on the run" and allow it to last longer that way.

The results cannot be translated into a dogma saying that CHR stations should play their most-played songs less times per day when they are in high rotate, but is does point towards shifting some of the most-played songs around more, resting them from time to time, even on the most narrow of hit format.

Looking back at the days when Music Directors got by with only instinct and a few Sales Charts as their tools, Currents were probably shuffled around in a way that resembles what we have found to be closer to listener preference. In the immortal words of Alanis Morissette: "Isn't It Ironic?".

One of the most surprising discoveries we made during our research was the notion that **taste in Classics can change just as dramatically and rapidly** as the taste in Currents. Thus, Classics need to be treated with the same high level of attention as the Currents, regarding selection and rotation policy. They need to be managed and nurtured weekly and planned in a different way than is typically done today.

Our survey points towards using a **larger music database** of Classics on CHR and AC radio stations and that shifting them quicker between active and inactive duty could boost their performance, in terms of positive listener reaction to them.

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The lowdown on the life cycle of radio songs (continued):

This survey may not suggest a complete re-write of the framework for analyzing music for radio stations is needed, but it certainly reveals that there are limits to how precise and concrete qualitative research can determine how a song will perform on-air.

Working with extensive data analysis for more than a year, we have determined a few other key factors to work with. Our data indicates there is often a vast and very important difference between how a song is rated when listeners are asked if they like it and how it scores when measured by how listeners react to it when it plays.

Some songs have "**high likeability" even when they are burnt**, causing listeners to switch stations or even turn the radio off, while some songs have "**low likeability" but still appeal to listeners**.

This could be related to positive memories attached to the song that make listeners like it "in theory" but not in "concrete listening situations", or even related to their general perception and degree of sympathy for the artist.

Our data also indicate that "**soft tools**" such as the way the talent puts both Currents and Classics into context for the listener can make an impact. An "unsold" song listeners may not know, or may not instinctively want to hear, is much more likely to perform badly than a song the talent has given them a chance to relate to.

We've Only Just Begun

Analyzing the 40 tracks in this survey in detail has told us that there are even more discoveries to be made as our methods are continually refined and our experience in breaking down listener reactions to songs grows over the coming years. We are very aware that a detailed analysis of a mere 40 songs with new methodology and technology can only be a humble beginning, in terms of completely understanding the fine machinery that prompts listeners to stay on or leave a station because of music.

Finally, we want to underline that the concrete measurements of this survey can only be used for drawing general conclusions. Since the results are based on a range of different formats from 3 different countries, the actual measurements for each song should not be seen as an indicator of how the same songs would cause listeners to react in another market or on a particular station.

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Part 3 - lists:

The 20 songs we analyzed for Part 1 are - in order of spins:

Artist	Title
Avicii	Wake Me Up
Passenger	Let Her Go
Pink f. Nate Ruess	Just Give Me A Reason
Avicii	Hey Brother
Daft Punk f. Pharell Williams	Get Lucky
Rihanna f. Mikky Ekko	Stay
Justin Timberlake	Mirrors
Katy Perry	Roar
Robin Thicke f. T.I. & Pharell	Blurred Lines
Nico & Vinz	Am I Wrong

Random Songs:

Artist	Title
Naugthy Boy Feat. Sam Smith	La La La
John Newman	Love Me Again
Imagine Dragons	On Top of the World
Lady Gaga f. R. Kelly	Do What You Want
Panamah	Børn af natten
Bruno Mars	Treasure
Veronica Maggio	Sergels Torg
Miley Cyrus	We Can't Stop
Laleh	Some Die Young
Avicii	You Make Me

The first 10 songs on the list are a combined top 10 for the period March 2013 and 12 months onward for the major radio stations in Scandinavia. The last 10 songs were picked at random from #100 to #11 in the top 100.

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Part 3 - lists:

The 20 songs we analyzed for part 2 are - in order of spins:

Artist	Title
Coldplay	Viva La Vida
Scorpions	Wind of Change
Kings Of Leon	Sex On Fire
Metallica	Nothing Else Matters
Robyn	Dancing On My Own
Queen	I Want To Break Free
Alice Cooper	Poison
U2	I Still Haven't Found What ….
Soul Asylum	Runaway Train
R.E.M.	Losing My Religion
The Police	Every Breath You Take
Michael Jackson	Billie Jean
Bon Jovi	Livin' On A Prayer
Nickelback	How You Remind Me
Red Hot Chilli Peppers	Under The Bridge
U2	With Or Without You
Limp Bizkit	Behind Blue Eyes
Beyonce	Halo
No Doubt	Don't Speak
Bruce Springsteen	Dancing In The Dark

These 20 songs are the top 20 most-played Classics in Scandinavia from the beginning of March 2013 and 12 months onward.

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Part 3 - Bonus info:

Best listener reaction in Sweden in 2013:

Currents: Lady Gaga f. R. Kelly "Do What You Want".

Classics: Michael Jackson "Billie Jean".

Best listener reaction in Denmark in 2013:

Currents: Mads Langer "No Gravity".

Classics: Amy Winehouse "Rehab".

Best listener reaction in Norway in 2013:

Currents: Petra Marklund "Händerna mot himlen".

Classics: Coldplay "Fix You".

Best listener reaction in Scandinavia combined in 2013:

Newly released songs: Mads Langer "Gravity".

Older songs: Harold Faltermeyer "Axel F".

NOTES:

In none of the three countries, nor in the market "Scandinavia combined", did female and male listeners agree as to which song performed the best.

All four markets had a different Classic as the best performing song each quarter of the year and only one Current performed the best in a market two quarters in a row (Scandinavia combined, Röyksop "Running To The Sea, Q1 & Q2).

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Get inside the mind of your listener for Cold Hard Facts.

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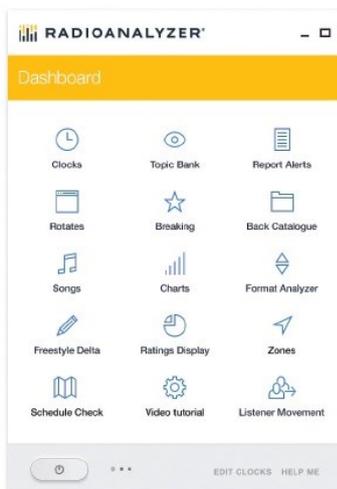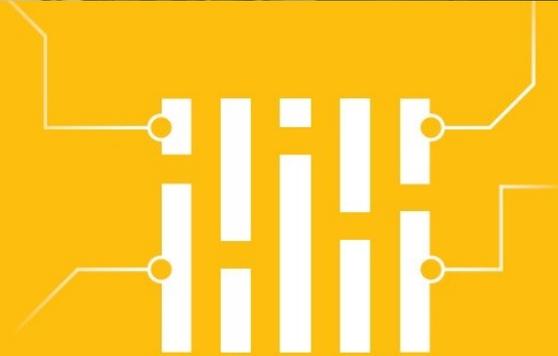Advanced analysis made easy to help you program music and plan content.

You already own the data
RadioAnalyzer unlocks it for you

Once upon a time you had to physically summon a selection of people, analyze and weigh their opinions and wait for weeks to get some answers.

No. More.

The truth is on your server right now, hiding in a sea of numbers that RadioAnalyzer can make sense of.

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