



# Emerging Music Airplay Study

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## I. EXECUTIVE SUMMARY

1. Canadian radio is playing a significant amount of music from emerging artists under any of the three applied definitions.
2. The surveyed stations averaged 37.6% Canadian Content over the 13-week period.
3. Quantitatively, there is little difference in airplay exposure for music from emerging artists under any of the proposed definitions.
4. Emerging artist airplay as a percentage of total airplay is 12.2% by Definition 1, 13.3% under Definition 2 and 11.4% using Definition 3.
5. The variance of emerging airplay between the definitions is 1.9% of total airplay.
6. Format structure influences emerging artist airplay more than market size.
7. Market size has no measureable influence on the amount of emerging airplay.
8. Contemporary Hit Radio spins the most amount of emerging music across all three definitions.
9. Mainstream AOR plays the most number of distinct titles under any definition.
10. The Country format in Definition 1 and Definition 3 and Adult Contemporary in Definition 2 play the least number of distinct emerging songs.
11. Under all three definitions songs are on average spun most frequently at Contemporary Hit Radio and least frequently at Mainstream AOR.

## II. OBJECTIVES

12. Nielsen BDS Radio, Canada (BDS) has been commissioned by the Canadian Radio-Television and Telecommunications Commission (CRTC) to complete an exclusive analysis using three proposed definitions of emerging artist airplay on English Canadian FM radio music over a 13-week period from 2008.
13. BDS will illustrate how music from emerging artists was played on 23 stations from six radio formats in four market sizes over 13 weeks in 2008. The study of 299 playlists from these stations will show similarities and differences in the airplay counts and usage for the proposed definitions of emerging artists. It will examine the amount of emerging artist airplay as a part of Canadian Content and the total airplay. The study will investigate emerging artist airplay by format and market size. An appendix to the report will also supply a summary and music playlists for each station during the 13 weeks.

### III. METHODOLOGY

14. Looking at a full week's programming for each of the 13 selected time periods, we utilized Nielsen BDS databases to analyze the playlists of a panel of 23 radio stations from six English commercial music formats: Adult Contemporary (AC), Contemporary Hit Radio (CHR), Country (CTY), Hot AC (HAC), Mainstream Rock/AOR (AOR) and Alternative/Modern Rock (ALT).
15. The 2008 BBM Radio Survey Guides were used to verify station formats and market population.
16. According to the BBM guide there was no station operating in the Alternative/Modern Rock format in a market of license with a population under 200,000. Therefore, this format is represented only in the three larger market sizes.
17. Playlists were drawn from BDS archives for the following stations:

FORMAT	POPULATION - STATION - MARKET			
	2M+	600k - 2M	200k – 600k	under 200k
Adult Contemporary <b>(AC)</b>	CJEZ-FM Toronto	CHFM-FM Calgary	CIQM-FM London	CHMX-FM Regina
Mainstream Top 40/ Contemporary Hit Radio <b>(CHR)</b>	CIDC-FM Toronto	CIBK-FM Calgary	CKBT-FM Kitchener	CKIX-FM St. John's
Country <b>(CTY)</b>	CJJR-FM Vancouver	CISN-FM Edmonton	CJKX-FM Oshawa	CHSJ-FM St. John
Hot AC <b>(HAC)</b>	CHUM-FM Toronto	CKCE-FM Calgary	CFMC-FM Saskatoon	CKMB-FM Barrie
Album Oriented Rock/ Mainstream Rock <b>(AOR)</b>	CFOX-FM Vancouver	CJKR-FM Winnipeg	CFRQ-FM Halifax	CIKR-FM Kingston
Alternative / Modern Rock <b>(ALT)</b>	CFNY-FM Toronto	CHDI-FM Edmonton	CJZN-FM Victoria	n/a

**Figure A: Station/Market Panels**

18. The BDS playlists were produced for each of the following weeks in 2008:

- Week 1: January 13-20
- Week 2: February 10-17
- Week 3: March 9-16
- Week 4: April 6-13
- Week 5: May 4-11
- Week 6: June 1-8
- Week 7: June 29-July 5
- Week 8: July 27-August 3
- Week 9: August 24-31

Week 10: September 21-28  
Week 11: October 19-26  
Week 12: November 16-23  
Week 13: November 30-December 6

19. The music programming was analysed using three proposed definitions for Canadian emerging artists as specified in the following criteria:

**Definition #1**

- *An emerging artist is a Canadian recording artist who has never had two recordings that have reached either the Top 40 position on one of the music charts listed in Schedule A or the Top 25 position on one of the music charts listed in Schedule B.*
- *Once an artist has had two recordings that have reached either the Top 40 position in one of the music charts listed in Schedule A or the Top 25 position in one of the music charts listed in Schedule B, the artist retains emerging status for a period of 12 months following the date on which the second recording reached either of those positions.*
- *If an artist who is a member of a duo, trio, or group with an established identity launches a solo career or creates, in company with others, a new duo, trio, or group with a new identity, this solo artist or new duo, trio, or group will be considered a new artist for the first 12 months following the date its second selection under the new identity is listed as described above.*

**Definition #2**

- *An emerging artist is a Canadian recording artist who has never had a recording that has reached either the Top 40 position on one of the music charts listed in Schedule A or the Top 25 position on one of the music charts listed in Schedule B.*
- *Once an artist has had a recording that has reached either the Top 40 position in one of the music charts listed in Schedule A or the Top 25 position in one of the music charts listed in Schedule B, the artist retains emerging status for a period of 36 months following the*

*date on which the recording reached either of those positions.*

- *If an artist who is a member of a duo, trio, or group with an established identity launches a solo career or creates, in company with others, a new duo, trio, or group with a new identity, this solo artist or new duo, trio, or group will be considered a new artist for the first 36 months following the date its selection under the new identity is listed on the charts.*

**Definition #3**

- *An emerging artist is a Canadian recording artist who has never had 2 recordings that have reached either the Top 40 position on one of the music charts listed in Schedule A or the Top 25 position on one of the music charts listed in Schedule B.*
- *Once an artist has had two recordings that have reached either the Top 40 position in one of the music charts listed in Schedule A or the Top 25 position in one of the music charts listed in Schedule B, the artist retains emerging status for a period of 6 months following the date on which the second recording reached either of those positions.*
- *If an artist who is a member of a duo, trio, or group with an established identity launches a solo career or creates, in company with others, a new duo, trio, or group with a new identity, this solo artist or new duo, trio, or group will be considered a new artist for the first 6 months following the date its second selection under the new identity is listed as described above.*

*Schedule A: RPM 100 Singles, RPM Retail Singles, Record Retail Singles, Canadian music Network National Airplay, Billboard Hot 100 Singles, Billboard Canadian Hot 100*

*Schedule B: The Record Country, RPM 100 Country Tracks, Canadian music Network Country Top 50 Audience, Billboard Hot Country chart, Neilson BDS Country Spins*

**IV. ANALYSIS**

**Emerging Airplay All Formats**

20. Canadian radio is playing a significant amount of music from emerging artists under all three definitions:

EMERGING AIRPLAY - ALL FORMATS		DEFINITION 1	DEFINITION 2	DEFINITION 3
		TOTAL	TOTAL	TOTAL
EMERGING	SPINS	53,333	57,777	49,477
	% total	12.2%	13.3%	11.4%
TOTAL CANADIAN	SPINS	163,038	163,038	163,038
	% total	37.6%	37.6%	37.6%
TOTAL	SPINS	434,115	434,115	434,115
	% total	100.0%	100.0%	100.0%

*\*All Format panel, all 13 weeks*

**Figure B: All Format Emerging and Canadian Spins**

21. Under definition 1:

- Emerging music accounts for 12.2% of all airplay.
- Emerging music accounts for 32.4% of Canadian airplay.

22. Under definition 2:

- Emerging music accounts for 13.3% of all airplay.
- Emerging music accounts for 35.0% of Canadian airplay.

23. Under definition 3:

- Emerging music accounts for 11.4% of all airplay.
- Emerging music accounts for 30.4% of Canadian airplay.

24. The stations average 37.6% Canadian Content over the 13 weeks studied.

25. The number of distinct emerging songs played under any definition varies by 71 songs or 0.5% in a universe of over 14,000 songs.

- Emerging songs under Definition 1 are 8.7% of all songs played.
- Emerging songs under Definition 2 are 8.2% of all songs played.
- Emerging songs under Definition 3 are 8.5% of all songs played.



EMERGING SONGS - ALL FORMATS		DEFINITION 1	DEFINITION 2	DEFINITION 3
		TOTAL	TOTAL	TOTAL
EMERGING	SONGS	1,233	1,162	1,211
	% total	8.7%	8.2%	8.5%
TOTAL CANADIAN	SONGS	3,453	3,453	3,453
	% total	24.2%	24.2%	24.2%
TOTAL	SONGS	14,258	14,258	14,258
	% total	100.0%	100.0%	100.0%

*\*All Format panel, all 13 weeks*

**Figure C: All Format Emerging and Canadian Songs**

26. The number of distinct Emerging songs as a portion of all Canadian songs is 35.7% under Definition 1, 33.6% for Definition 2 and 35.1% in Definition 3.

### Format Performance Total Airplay

27. Under both definitions, current new music driven formats spin the most music from emerging artists.

SPINS BY FORMAT - EMERGING ARTISTS						
	DEFINITION 1		DEFINITION 2		DEFINITION 3	
	TOTAL	% Total	TOTAL	% Total	TOTAL	% Total
AC	4,901	1.1%	4,629	1.1%	4,453	1.0%
ALT	10,802	2.5%	11,717	2.7%	9,861	2.3%
AOR	5,639	1.2%	5,886	1.4%	5,406	1.2%
CHR	16,395	3.8%	17,412	4.0%	15,634	3.6%
CTY	5,653	1.3%	6,854	1.6%	5,346	1.2%
HAC	9,943	2.3%	11,279	2.6%	8,777	2.0%
<i>Emerging % of Total Spins</i>	53,333	12.2%	57,777	13.3%	49,477	11.4%

**Figure D: Format Performance Emerging Airplay**

28. In terms of total airplay, CHR spins the most emerging music under all three definitions at 3.8%, 4.0% and 3.6% of total play respectively.

29. Alternative (represented by three stations) spins the second highest amount of emerging music in all definitions. Hot AC ranks third highest spinner regardless of which definition is applied.

30. Gold-oriented formats such as AOR Mainstream Rock and Adult Contemporary spin the least amount of emerging music.

## Format Profile Emerging Play

31. Consistent with overall airplay, examining each format's contribution to emerging airplay shows CHR as the leading proponent in all definitions.

a. Over 30% of emerging airplay in any definition comes from CHR.

FORMAT PROFILES						
	DEFINITION 1		DEFINITION 2		DEFINITION 3	
EMERGING	Total	%Category	Total	%Category	Total	%Category
AC	4,901	9.3%	4,629	8.0%	4,453	9.0%
ALT	10,802	20.5%	11,717	20.3%	9,861	19.9%
AOR	5,639	9.6%	5,886	10.2%	5,406	10.9%
CHR	16,395	31.1%	17,412	30.1%	15,634	31.5%
CTY	5,653	10.7%	6,854	11.9%	5,346	10.8%
HAC	9,943	18.8%	11,279	19.5%	8,777	17.7%
<i>Total Spins</i>	53,333	100%	57,777	100%	49,477	100%
NON EMERGING						
AC	22,633	20.5%	22,905	21.8%	23,081	20.4%
ALT	10,198	9.2%	9,283	8.8%	11,139	9.8%
AOR	19,598	18.3%	19,351	18.4%	19,831	17.5%
CHR	14,095	12.8%	13,078	12.4%	14,856	13.1%
CTY	23,406	21.2%	22,205	21.1%	23,713	20.9%
HAC	19,775	17.9%	18,439	17.5%	20,941	18.5%
<i>Total Spins</i>	109,705	100%	105,261	100%	113,561	100%
FOREIGN						
AC	48,048	17.7%	48,048	11.1%	48,048	11.1%
ALT	34,392	12.7%	34,392	7.9%	34,392	7.9%
AOR	43,895	16.2%	43,895	10.1%	43,895	10.1%
CHR	45,801	16.9%	45,801	10.6%	45,801	10.6%
CTY	48,431	17.9%	48,431	11.2%	48,431	11.2%
HAC	50,510	18.6%	50,510	11.6%	50,510	11.6%
<i>Total Spins</i>	271,077	100%	271,077	100%	271,077	100%
<b>GRAND TOTAL</b>	<b>434,115</b>		<b>434,115</b>		<b>434,115</b>	

Figure E: Format Profile Emerging Airplay

32. Even with a tighter hit window (Top 25) applied to the definitions, Country, although a current-driven format, generates less emerging music compared to CHR, Alternative and Hot AC.

33. CHR plays more emerging than non-emerging music under all definitions:

- a. CHR plays 16,395 emerging spins versus 14,095 non-emerging in Definition 1, 17,412 against 13,078 in Definition 2 and 15,634 emerging versus 14,856 non-emerging in Definition 3.
  - b. Alternative plays 604 more spins from emerging in Definition 1 and 2,434 more in Definition 2 but in Definition 3 non-emerging tops emerging play by 1278 spins.
34. In CHR, the variance of over 4,000 spins in favour of emerging music in Definition 2 is a by-product of the wider three year time frame.
35. Alternative's higher spins for emerging under Definition 2 could be linked to the format's tendency to play music from upcoming artists who do not register on the hit charts.

FORMAT COMPOSITION / EMERGING SPINS vs SONGS												
	Definition 1				Definition 2				Definition 3			
	Spins	% Format Total	Songs	% Format Total	Spins	% Format Total	Songs	% Format Total	Spins	% Format Total	Songs	% Format Total
<b>AC</b>	4,901	6.5%	158	4.5%	4,629	6.1%	127	3.6%	4,453	5.9%	154	4.4%
<b>ALT</b>	10,802	19.5%	343	12.3%	11,717	21.2%	343	12.3%	9,861	17.8%	332	11.9%
<b>AOR</b>	5,639	8.2%	381	7.5%	5,886	8.5%	371	7.3%	5,406	7.8%	380	7.5%
<b>CHR</b>	16,395	21.5%	341	10.1%	17,412	22.8%	328	9.7%	15,634	20.5%	332	9.8%
<b>CTY</b>	5,653	7.3%	147	5.8%	6,854	8.8%	149	5.9%	5,346	6.9%	140	5.5%
<b>HAC</b>	9,943	12.4%	229	8.1%	11,279	14.1%	203	7.2%	8,777	10.9%	218	7.7%

Figure F: Format Composition Spins and Songs

36. An analysis of each format's internal makeup in Figure F shows a large proportion of emerging spins generated by current new music formats. That being said, the size of the inventory used to generate the spins is not incumbent on spins.
- a. As a percentage of CHR's own total spins, emerging music makes up 21.5%, 22.8% and 20.5% from Definition 1, 2 and 3 respectively, the highest of any format.
  - b. CHR plays 341 distinct emerging songs under Definition 1, 328 under Definition 2 and 332 in Definition 3 but does not play the largest number of emerging songs.

37. AOR Mainstream Rock plays the most number of distinct emerging songs across all definitions with 381, 371 and 380 songs respectively, but registers the lowest number of emerging spins.

- a. This format plays the most number of distinct songs at 5,056. The low percentage figures for the ratio of emerging songs compared to the total, 7.5%, 7.3% and 7.5% are a result of the format's musical philosophy. AOR generally maintains a large universe with a low repeat factor.

38. Adult Contemporary, also a gold oriented format, shows low emerging airplay and inventory.

- b. Emerging music spins are at 6.5%, 6.1% and 5.9% of AC play in each definition.
- c. Distinct emerging songs make up 4.5%, 3.6% and 4.4% of the AC universe in the respective definitions.

### **Format Profile Emerging Rotations**

39. Overall, the average number of spins of emerging music by format does not vary significantly in any one definition:

<b>EMERGING SONGS AVG ROTATION BY FORMAT</b>				
		<b>Definition 1</b>	<b>Definition 2</b>	<b>Definition 3</b>
<b>FORMAT</b>	<b>STATION</b>	<b>AVG SPIN</b>	<b>AVG SPIN</b>	<b>AVG SPIN</b>
<b>AC</b>	CJEZ	14.4	16.2	13.6
	CHFM	30.8	36.5	27.1
	CIQM	12.9	15.1	12.3
	CHMX	21.0	25.9	17.9
<b>AC AVG</b>		<b>19.8</b>	<b>23.4</b>	<b>17.7</b>
<b>ALT</b>	CFNY	11.6	13.2	10.9
	CHDI	20.9	21.9	19.8
	CJZN	31.0	30.2	30.0
<b>ALT AVG</b>		<b>21.2</b>	<b>21.8</b>	<b>20.2</b>
<b>AOR</b>	CFOX	9.6	11.3	10.2
	CJKR	9.0	11.3	10.2
	CFRQ	11.8	13.2	12.1
	CIKR	10.1	10.9	10.5
<b>AOR AVG</b>		<b>10.1</b>	<b>11.7</b>	<b>10.8</b>
<b>CHR</b>	CIDC	21.7	22.5	21.9
	CIBK	36.1	37.8	35.7
	CKBT	37.8	40.4	36.6
	CKIX	27.0	30.0	27.1
<b>CHR AVG</b>		<b>30.7</b>	<b>32.7</b>	<b>30.3</b>
<b>CTY</b>	CJJR	40.6	40.0	41.3
	CISN	28.3	28.9	28.1
	CJKX	24.7	25.8	24.8
	CHSJ	13.4	14.8	13.1
<b>CTY AVG</b>		<b>26.7</b>	<b>27.4</b>	<b>26.8</b>
<b>HAC</b>	CHUM	26.1	32.0	23.9
	CKCE	24.2	27.2	23.0
	CFMC	32.3	39.0	30.8
	CKMB	25.0	29.3	22.8
<b>HAC AVG</b>		<b>26.9</b>	<b>31.8</b>	<b>25.1</b>

**Figure G: Emerging Average Rotation**

40. CHR spins emerging music more frequently with an average of 30.7, 32.7 and 30.3 spins from the four stations for each definition.

- a. Hot AC and Country, both current new music driven formats, rank second and third in terms of average spins from the representative stations.
- b. AOR/Mainstream Rock rotates emerging music slowest with a combined station average of 10.1, 11.7 and 10.8 spins per definition.

41. All formats spin emerging music more frequently under Definition 2.
42. Three formats show more than a 10% increase in average play of emerging music when comparing rotations from Definition 1 or Definition 3 to Definition 2.
- AC spins emerging music 18% more frequently under Definition 2 compared to Definition 1 and 32% more than at Definition 3.
  - AOR/Mainstream spins Definition 2 emerging music 15% more often than Definition 1 and 9% more than Definition 3.
  - Using Definition 2, Hot AC spins emerging music 19% more often than at definition 1 and 27% more than Definition 3.

### Market Play and Song Distribution

EMERGING SONGS AVG ROTATION BY FORMAT								
			Definition 1		Definition 2		Definition 3	
FORMAT	MARKET	SIZE	SPINS	SONGS	SPINS	SONGS	SPINS	SONGS
AC	Toronto	2M+	1,136	79	1,036	64	1,033	76
	Calgary	600k- 2M	1,231	40	1,276	35	1,083	40
	London	200k - 600k	1,019	79	994	66	922	75
	Regina	<200k	1,515	72	1,323	51	1,415	79
ALT	Toronto	2M+	2,738	236	3,190	241	2,480	227
	Edmonton	600k- 2M	3,138	150	3,548	162	2,788	141
	Victoria	200k - 600k	4,926	159	4,979	165	4,593	153
AOR	Vancouver	2M+	1,939	189	2,196	194	1,912	188
	Winnipeg	600k- 2M	1,160	108	1,307	116	1,083	106
	Halifax	200k - 600k	1,258	99	1,191	90	1,227	101
	Kingston	<200k	1,282	110	1,192	109	1,184	113
CHR	Toronto	2M+	4,131	190	4,189	186	4,053	185
	Calgary	600k- 2M	3,795	105	4,044	107	3,533	99
	Kitchener	200k - 600k	5,285	140	5,703	141	5,044	138
	St. John's NL	<200k	3,184	118	3,476	116	3,004	111
CTY	Vancouver	2M+	1,665	41	1,960	49	1,527	37
	Edmonton	600k- 2M	1,243	44	1,559	54	1,209	43
	Oshawa	200k - 600k	1,529	62	1,886	73	1,438	58
	St. John NS	<200k	1,216	91	1,449	98	1,127	86
HAC	Toronto	2M+	2,528	97	2,909	91	2,247	94
	Calgary	600k- 2M	2,754	114	2,987	110	2,395	104
	Saskatoon	200k - 600k	3,035	94	3,391	87	2,743	89
	Barrie	<200k	1,626	65	1,992	68	1,392	61

Figure H: Market Spins and Songs by Format

43. Market size does not impact emerging artist airplay under any definition. The amount of airplay and songs are factored by format.
44. Historically, small market radio has been considered the launching point for new music. This research shows that emerging music spins peak on current new music formats across a variety of market sizes; from Kitchener for CHR, Saskatoon for Hot AC and Vancouver for Country.
- a. The largest number of emerging spins comes from CHR in Kitchener, a tertiary 200k – 600k size market.
  - b. The biggest number of emerging songs at CHR comes from the biggest market: Toronto.
  - c. In terms of song inventory, the Alternative format in the Toronto market played the most emerging songs overall, while Victoria registered the most spins.
  - d. Toronto and Vancouver, with a population of over two million people, have the most emerging songs at Alternative, AOR/Mainstream Rock and CHR in all three definitions.
  - e. Vancouver records the highest number of emerging spins at AOR and Country while the biggest emerging Country playlist comes from Saint John, with a population less than 200,000.
  - f. The largest number of emerging spins in AC comes from Regina in all three definitions.
  - g. Saskatoon, a tertiary market, spins the most Hot AC emerging music and Calgary has the biggest Hot AC emerging song inventory.

## V. OUTCOMES

45. Based on airplay spins, applying Definition 2 exposes more Canadian emerging music than does Definition 1 which in turn exposes more emerging music than Definition 3.
- a. Definition 2 generates more emerging airplay across the majority of the formats by gaining a larger number of combined spins.
  - b. Definition 2 generates more airplay for emerging artists as a portion of Canadian Content.
46. Definition 1 plays more distinct emerging selections when all formats are combined.
- a. Definition 1 shows more emerging airplay spins at only one format, AC, which demonstrates the fewest spins and smallest song count out of all formats.
47. The baseline for this study assumes all Canadian artists without a charted hit are emerging. This holds in any of the proposed definitions. Encouragement to achieve and measure success is from airplay and chart consensus moderated by the three proposed definitions.
48. Under Definitions 1 and 3, emerging artists may have one hit song but have never had two hit songs.
- In Definition 1 an artist is considered emerging for one year after the second song achieves hit status.
  - In Definition 3 an artist is considered emerging for six months after the second song achieves hit status.
  - By these definitions, any artist who has only one hit song is in perpetuity emerging.
49. The outcome of the study shows Definition 1 qualifies more songs as emerging.
50. Definition 2 applies a three-year window in which time an artist may have a multiple of charted hits but is still considered emerging.
- This three-year window allows a longer time period for emerging songs to be spun. Therefore, emerging songs under Definition 2 receive more airplay.
51. Definition 3 qualifies fewer songs as emerging than Definition 1 but more than Definition 2.
52. Definition 3 exposes the least emerging music in terms of airplay.



## **VI. LIST OF FIGURES**

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