
• Music Cycle Updated, Part 1

February 14, 2022



Beginning Year Three of the Doldrums In 2022, We Need To Change Our Ways Of Finding New Hits

As we're a month and a half into a new year, and especially if you're in Top 40 radio, you don't need to be told that we're in the second year of Doldrums of the Music Cycle, which began in 2020 with COVID, as well as a weaker period of music for Top 40 radio.

SIGNS OF THE DOLDRUMS

The biggest Doldrums indicator is when Top 40 ratings are low. Just like in 2020 for most markets, Classic Rock, Classic Hits and AC formats continue to dominate, and Top 40 is barely Top 7, with many stations out of the top 10 completely. Some of this drop is because the audience which consumes a lot of radio is aging. As we know, radio may be the most listened to medium on a weekly basis, but streaming and apps like TikTok are becoming more and more where people under 30 spend most of their time when they listen to music, while more 30+ listeners are the ones who listen most to radio.

It's easy to see this when you look at the Top 40 radio format overall, which has lost 33%, the second biggest share of listening drop over the last decade from 2011 of any radio format. (Rhythmic Top 40 had the biggest drop at 53%.) As Edison Research's Larry Rosin mentioned in his great article, [Music-radio-a-kingdom-of-gold/ Larry Rosin on CHR ratings loss](#) "One sees Classic Rock, Classic Hits, Mainstream AC, along with News and Sports stations taking the top slots. American music radio is rapidly becoming a 'Kingdom of Gold.'" He also notes that none of the current-based formats today are "thriving based on current music."

	Nominal share change <u>2011-2021</u>	% share change <u>2011-2021</u>
Classic Rock	+1.2	+30%
Contemporary Christian	+1.0	+49%
News/Talk (Commercial & Non-Comm)	+0.8	+8%
Spanish Contemporary	+0.4	+17%
Classic Hits	+0.4	+7%
Classical	+0.3	+22%
Urban Adult Contemporary R&B	+0.3	+6%
Urban Contemporary Hip-Hop/R&B	+0.1	+5%
All Sports	0	0%
Spanish Adult Hits	0	0%
Hot Adult Contemporary	-0.1	-2%
Alternative	-0.2	-7%
Adult Hits	-0.2	-8%
Active Rock	-0.2	-13%
Adult Contemporary	-0.6	-7%
//All News	-0.6	-22%
Mexican Regional	-0.8	-20%
Country + New Country	-1.0	-14%
Rhythmic Contemporary Hit Radio	-2.1	-53%
Pop Contemporary Hit Radio	-2.6	-33%

Nielson 6+ Format grid from Larry Rosin's article [Music-radio-a-kingdom-of-gold/ Larry Rosin on CHR ratings loss](#)

For 50 years, hit songs came from television shows as well as movies, but it's been years since a hit song broke from a network television show, even from music event shows like "American Idol" or "The Voice."

For 2021, there were no music television shows -- not "The Voice" nor the Grammys -- which had been in the Top 20 television shows in recent years. Eighteen of the 20 were mostly NFL or college football games, something scripted, and the Oprah Winfrey interview with Megan and Harry. In fact, music television's premiere event, the Grammys, dropped by 52% from 2020 to 2021 at 8.7 million viewers, and has dropped 32 million from 2012 when it had 40 million viewers.

Yes, some of the Grammys decline is because of visual content consumption fractionalization as network television and cable are in an existential battle with streaming

visual audio, but a lot of the drop is also due to less interest in current music. Just like music, streaming video has also changed that consumption pattern.

Television does not have the draw it once had, due to cable and multiple streaming video services. There are so many different choices in different locations available that the potential audience is splintered among many different sources. As a result, there are fewer mega blockbuster shows that draw a huge audience. But there are still shows that build up a big enough audience through streaming video that expose new (and old) music to new younger audiences.

One of the biggest Doldrums indicators, besides Top 40 ratings, is the amount of Gold music that is exposed/consumed. The amount of current music being bought versus previous years dropped dramatically in 2021, as Ted Giola wrote about in *The Atlantic*. In the first half of 2021, 82% of music sales/consumption was catalog music compared to 2020, when that number was 63.2%.

It's even more dramatic when compared to what we saw in 2006 and 2007, when it was 37% catalog sales. It remained the around the same throughout the 80s and 70s at 36% So that means that current music sales/consumption today is 18% vs 64% in 1970.

Another interesting fact is the amount of Gold that is becoming popular on apps like TikTok, and also making its way onto traditional and satellite radio. This started with the "Guardians Of The Galaxy" movie franchise and the famous "70s Mix Tape," which relaunched the popularity of early to mid '70s titles. This continues today with popular young adult shows like HBO's "Euphoria" exposing Steely Dan and Gerry Rafferty hits to an entirely new, younger audience.

Also, you see '70s songs showing up on TikTok's Trending 10 weekly survey on SiriusXM, with those songs getting Top 200 Shazams and becoming popular on streaming. On average, half of the most TikTok'd songs every week that make the Trending 10, consumed mostly by teens and young adults, are Gold! Can you say DOLDRUMS?

I posted in [the last music cycle article](#) that the 2020 number of consensus A-Power hits for Top 40 was 28. Nothing really changed much with the amount of consensus hits this past year, as there were only 27 A-Power hits in 2021. That is the lowest number of powers during these past two year that I've seen in decades.

When you look at your A-Powers and B-Medium secondaries together (i.e. the Top 20 hits) as [Sean Ross with BDS Radio's Adam Foster did last month](#), looking at BDS Radio, it

showed that the amount of Top 20 hits is almost exactly what it was in 2016, but lower than it was in back in 2013. For 2021, it's up 13% from its average between 2018-2020.

So, bottom line, Top 40 is in the worst Doldrums period it's been in since the early '90s for several reasons. Certainly radio faces an existential threat from more competition than its ever had, especially from a music standpoint, from streaming services and apps like TikTok. Also, it is radio's biggest challenge to find, attract and keep the best air personalities on radio and not have them be drafted by the streaming services and apps. But still another major problem exists and that's a music issue--especially for Top 40.

Top 40 radio wins when it plays the hits! But let's drill down on that, because it doesn't mean play ALL THE POP GENRE HITS. It means play ALL the hits (regardless of genre).

GENRE HISTORY THROUGH 60 YEARS, PERCENTAGES OF POP REMAIN SIMILAR

Let's take a look at the history of music, looking at genres for Billboard year-end lists as a guide. We know the basic formula of Rock, Pop and Hip Hop (along with AC and Country) has been around for 65 years since Elvis Presley hit the scene in 1956.

I went back through every year-end chart for every year back to 1955, noting that 1960 is where Top 40 radio was firmly in place as the radio leader in playing the hits and music discovery. Let's start there.

What you see in EVERY SINGLE DECADE is that the hits are a variety of genres. Those percentages of genres may ebb and flow, but the BALANCE OF GENRES hasn't really changed. The Country average hadn't changed until the last decade, when Country exploded in the Doldrums in 2011-2013 (as well as 2014) and again in 2019. And in 2020-2021, the average percentage for Country is at an all-time high at 18% (see the 2nd genre graph).

AC was a huge portion of Billboard's Year End Charts in the '60s, '70s, and '80s, but began to fall off in the '90s, and is now below double digits the last two decades. Rock (plus Alternative) was a big part of what was popular through the decades peaking in the '80s, and was still in double digits during every decade until the 2010s That combination of AC/Rock/Country/other I'll call the "Variety Mix" (because it adds a uniqueness that is currently an underplayed part of Top 40 radio).

The percentage of Hip Hop and R&B began to explode in the '90s and 2000s, and still remains the biggest segment of the most popular year-end songs at 43% for the past two years, and it's still underplayed by Top 40. You can see by the balance of genres on the

popularity chart, driven until recently solely by radio airplay, most of that being Top 40 for the majority of the 60 years.

One thing Top 40 programmers have done is make sure they were checking all the formats and listening to songs from those formats that could cross over and become hits for Top 40. That should never have changed, but it has during the last 10 years!

Takeaway #1

Pop has been about the same for Billboard’s most popular year-end charts, averaging 30% and ranging between 25-40% for 60 years. It’s currently 30% for the past two years, but it’s definitely not the 55-65% like Top 40 has played since 2012 (see the 2nd genre graph).

Takeaway #2

Other genres like Hip Hop and Country have replaced Pop in popularity. So, it’s really critical to be open to both Country and “melodic” Hip Hop at Top 40.

Takeaway #3

Pop will always be the glue for Top 40, BUT the format’s #1 mission going back to its birth in the ‘50s, and continuing for the last 60+ years, has been to “Play The Hits,” regardless of genre.

	2020+2021	Decade Avg	2010s	2000s	1990s	1980s	1970’s	1960s
COUNTRY	18%	5%	10%	6%	2%	3%	5%	5%
AC/Pop Rock	5%	19%	7%	9%	16%	32%	26%	21%
ROCK	4%	11%	6%	10%	12%	17%	13%	10%
OTHER/LATIN	2%	1%	1%	1%	1%	0%	0%	0%
AC/RCK/CTRY/Other	29%	36%	24%	26%	31%	53%	44%	36%
POP	30%	30%	39%	23%	22%	29%	26%	38%
HH/R&B	43%	36%	37%	51%	47%	19%	30%	29%

So why do we think Top 40 is so sonically focused on Pop? We know Pop is the "glue," as Cox CEO Bob Neil used to say to me, and it holds the other genres together for Top 40. Also, as I’ve mentioned before, Top 40 programmers have been nervous about straying from that approximate 60% airplay focus of the Pop genre for the past decade.

I think a lot of it stems from the previously worst Doldrums of the music cycle in the early part of ‘90s. That was when Top 40 played too much AC music and wouldn't embrace Pop (or Hip Hop or Rock). So labels stopped producing a lot of Pop-genre current product, and didn't promote Rock and Hip Hop R&B to Top 40. The results were disastrous. Ratings plummeted, and owners took 500 Top 40 stations out of the Top 40 format.

Top 40 returned to success finally in 1997 when the Pop genre came back with the boy bands and Britney/Christina in the late ‘90s and early ‘00s. Great programmers like Tom

Poleman and Z100 led the way out of the Doldrums by re-embracing the Pop genre, but still insisting on playing All The Hits from multiple genres again as well!

GENRE PERCENTAGES 2021 AND THE LAST DECADE OVERFOCUSING ON POP

Let's drill down to the last decade to understand the quandary that Top 40 finds itself in. First, let's do a comparison of the Popularity Year End Charts (Billboard) versus Top 40 Spins Year End Charts (Mediabase). Look at traditional genre percentages this last decade for the big three genres of Top 40: Rock, Pop, and (Hip Hop) R&B, as well as Country and AC. One factor to take a special look at is, again, what I call the Variety Mix of AC/Rock/Country/other. Also, combine that with a look at the difference between popularity vs Top 40 spins for Pop as well as R&B/Hip Hop

Pop is 30% of 2021's Billboard Top 100 Year End Most popular songs, versus Mediabase's Top 100 Year End Top 40 spins chart, which is 57%. That's slightly better than last year, but still, that's too much Pop compared to what you see in Billboard's Popularity Chart! In 2021, R&B Hip Hop vs. 26% for 2021, which is consistently where it has been the last four years for Top 40 spins (Mediabase). Top 40 can still afford to play more Hip Hop and R&B when it is melodic.

Also, another sign of the Doldrums is you should see growth at Top 40 for the Variety Mix of AC/Rock/ Country/other. Let's take a look at the genre spin percentages for Top 40 during 2011-2013, where Top 40 ratings were still doing well. Top 40 spins reflected the hits back during that Doldrums period, as Top 40 continued to play Pop as the glue, but it shifted the amount of Pop down even as low as 45% in 2011, and in the 55% range during 2012-2013.

During that Doldrums period, those percentages of Pop were replaced by adding more Rock (16%) and melodic Hip Hop/R&B (35%) in 2011, more AC (12%) in 2012, and both Rock (17%) and AC (12%) in 2013. However, we haven't seen the growth you normally see for the Variety Mix of AC/Rock/Country/other during the first two years of this Doldrums period, 2020-2021.

Finally, take a look at the duplication between Top 40 spins Year-End Chart (Mediabase) and the Billboard Year End Top 100. This is the best index we have to determine whether Top 40 is staying true to "Playing the Hits." It has gone from the 80% range back in the late 2000s through 2010, to 65% duplication in the first half of this decade to around 54% the last four years. That a dangerous departure from Top 40's #1 mission, "Play the Hits!"

Sure, we know that there will always be "deep format" sounds that were extremely popular with fans of that format and made it high on Billboard. Examples are harder Rap for Hip Hop

and R&B that appeal to that format only, or super twangy songs for Country that only appeal to Country fans and, occasionally, super hard Rock songs that appeal to Active Rockers. And yes, those songs may not be perfect for Top 40.

Also, we know streaming doesn't necessarily reflect the entire mass audience completely yet. And yes, you have a group of people that still get their hits primarily from radio. However, the amount of non-streamers is growing smaller and older by the day.

One other factor that you have to consider when looking at streaming is, with one person still counting as 350 streams a week, you have chance that fan clubs can still jack a song up the streaming chart, and that has a huge weight in the Billboard charts. Nevertheless, we know with every year that passes, streaming is becoming that much more and more the best indicator of a song's popularity with the mass audience.

BILLBOARD YEAR END	2021	2020	2019	2018	2017	2016	2015	2014	2013	2012	2011	2010
AC/POP ROCK	5%	4%	4%	3%	6%	8%	11%	8%	10%	7%	5%	11%
ROCK	4%	4%	5%	4%	4%	7%	8%	9%	12%	9%	2%	3%
COUNTRY	17%	18%	13%	8%	6%	3%	4%	12%	13%	14%	16%	7%
Latin	4%	0%	0%	4%	1%	0%	1%	1%	0%	0%	1%	0%
AC/RCK/CTRY/Other	30%	26%	22%	19%	17%	18%	24%	30%	35%	30%	24%	21%
POP	30%	29%	29%	29%	41%	42%	43%	43%	41%	38%	42%	42%
HIPHOP/R&B	40%	45%	49%	52%	42%	40%	33%	27%	24%	32%	34%	37%

CHR AIRPLAY YEAR END CHARTS	2021	2020	2019	2018	2017	2016	2015	2014	2013	2012	2011	2010
AC/POP ROCK	6%	4%	3%	3%	6%	9%	10%	6%	12%	13%	3%	12%
ROCK	6%	4%	9%	6%	6%	8%	8%	11%	17%	7%	16%	5%
COUNTRY	3%	3%	3%	0%	4%	0%	0%	0%	2%	0%	2%	1%
Latin	2%	0%	1%	1%	1%	0%	0%	1%	0%	0%	1%	0%
AC/RCK/CTRY/Other	17%	26%	16%	10%	17%	17%	18%	18%	31%	20%	22%	18%
POP	57%	60%	62%	66%	64%	64%	58%	61%	55%	57%	43%	46%
HH/R&B	26%	25%	22%	24%	19%	19%	24%	21%	14%	23%	35%	36%

POPULARITY VS AIRPLAY TITLE DUPLICATION	2021	2020	2019	2018	2017	2016	2015	2014	2013	2012	2011	2010
	55%	54%	52%	54%	67%	70%	66%	71%	67%	60%	70%	82%

Definitely in the last few years Top 40 programmers began to get stuck in a rut and cling to the Pop genre that began during the Superstar Pop explosion, and that brought on a rebirth of the Pop Music cycle between 2014-2017. That period in the past decade had the most amazing group of Pop artists since the '80s.

As I talked about a year ago, don't get caught up in a bind thinking you have to focus 65% or more of your airplay -- basically your entire station's sound -- on the Pop genre. We know as Jon Coleman taught us, music is the base of the "image" pyramid for a music station, so there is a "music" reason that ratings are low for top 40, and that reason is that the format is stuck in a "Pop Genre" rut, and has been for eight years since 2014.

Back in 2014 it made sense, and Top 40 ratings were strong with that strategy when Taylor Swift and Katy Perry were queens of Pop, Adam Levine and Maroon 5 and Bruno Mars were reigning kings of Pop. Justin Bieber and Selena Gomez were maturing hit artists, and today's Pop queen, Ariana Grande, was coming on the scene.

When you also include the great EDM artists like The Chainsmokers, you had an amazing group of hitmakers. However, over the last few years, it was clear that other genres were replacing Pop as the most popular genre. Both Hip Hop and Country have enjoyed a big gain in popularity. Hip Hop has become the #1 genre in the world!

Next week in Part 2, Guy cites a specific hit song that he feels was 'missed,' and points out a glaring example of very similar situation that's happening right now with "We Don't Talk About Bruno." He also wonders if Top 40 should be making some demo adjustments, and makes suggestions about how to keep your listenership loyal.