



STREAMING
COUNTRY MUSIC
FORWARD



INTRODUCTION



Country music's roots run deep through America, from the foothills of the Appalachian Mountains, to the honky-tonks of Texas, and the unrivaled creativity of Music Row in Nashville. Just over 100 years ago, country music was first broadcast over the radio, and not long after, it was among the first music to be recorded and sold. The history of music in America simply cannot be told without an acknowledgement of the importance of country music.

But it isn't just the history of music that prominently features country—it's the present and the future as well. It's often said that country music fans were slower to embrace streaming than others. Regardless of why that may have been, the inescapable truth is that country music fans have found their way to streaming, and country music has found its way to new fans thanks to streaming. 76% of country music streamers listen to music daily, and nearly half of country music streamers have increased their listening frequency since they first started streaming.

As technology has evolved to bring country music to fans old and new across America and throughout the world, so too has our understanding of what country music is, who can make it, and who listens to it. We wanted to dig into this vibrant part of the music industry to better understand the interconnected nature of the relationship between artists making incredible music, fans who just might be the most loyal music listeners around, and the technological innovations that have made possible new pathways to success and engagement.

We interviewed five of the leading digital executives involved in country music: **Michelle Kammerer**, Head of Country Music at Amazon Music; **Steve Blatter**, Senior Vice President & General Manager of Music Programming at Pandora/SiriusXM; **Margaret Hart**, Head of Nashville Label & Industry Relations at YouTube; **Jay Liepis**, Music Business Partnerships - Nashville at Apple Music; and **Brittany Schaffer**, Head of Artist & Label Partnerships - Nashville at Spotify. These executives shared fascinating insights and analysis of both the state of country music today and thoughts about where this vital genre is headed.

To learn more about country music fans in the United States, we also asked FTI Consulting to construct a profile of country music streamers. And because we want to make sure you have something fun to listen to while you read the report, we asked the executives we interviewed to highlight some under-the-radar country artists that everyone should know and love.

Country music in 2023 is rich, vibrant, diverse and as essential to telling vital stories that make fans around the world cry, dance, laugh and sing as it ever has been. Stream country music forward and read on to learn why.

Garrett Levin
President & CEO
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STREAMING
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FORWARD 2023



Michelle Kammerer
Head of Country Music

Steve Blatter
Senior Vice President & General Manager of Music Programming

Margaret Hart
Head of Nashville Label & Industry Relations

Jay Liepis
Apple Music Business Partnerships - Nashville

Brittany Schaffer
Head of Artist & Label Partnerships - Nashville



Country Fan Profile

Areas where streaming services surpass other music listening platforms according to country streamers:

Customize music based on preferences:

59%

Ability to decide what to listen to and when:

56%

Catalog/library size:

55%

63%

of country music streamers are female.

87%

of country music streamers find recommendations from audio streaming services useful.

76%

of country music streamers tend to research or look up songwriters of songs they listen to.

62%

of country music streamers say audio streaming services have made them more of a fan of a new artist or different genre.

76%

of country music streamers listen to music daily.

69%

of country music streamers say they are more likely to continue listening to artists or songs that are recommended to them on audio streaming services.

63%

of country music streamers say audio streaming services have made them more of a fan of their current favorite artist or genre.

73%

of country music streamers are aware of when their favorite artist is touring or having concerts.

Country music streamers spend, on average, about

1.6x

more time listening to music annually (1,270 hours/year) compared to country music fans who do not stream (798 hours/year).

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What does streaming mean for the country music fan, and the country music artist?



Brittany Schaffer (Spotify): Streaming has given country music fans the ability to discover more artists and consume more music than ever before! For some fans, discovery may be an emerging artist, an artist on the fringe of the genre who never previously received radio airplay, or a catalog song or artist as they dig into their parents' listening library. For artists, streaming has likewise opened up their world, allowing them the opportunity to release more music more frequently, to find new audiences (even those who would not label themselves a "country music fan"), and to reimagine how they connect with their fans. It's clear streaming has removed many of the prior barriers to entry, allowing new artists to find fans all around the world from anywhere in the world.



Steve Blatter (SiriusXM/Pandora): It's exciting to see all styles of country music doing well, those considered mainstream or more burgeoning sub-genres and artists. Streaming helped give a platform to non-traditional artists just as it connected new listeners who may not have previously been considered traditional country music fans. The data that artists are able to get from streaming services, like Pandora's Artist Marketing Platform, allows them far more insight into where their fans are and what resonates with them.

Because country music fans are more engaged, they tend to be a more active participant in their listening. Country listeners have benefited more from the ability to give feedback on streaming platforms than we see in most other genres. One of the reasons Pandora has been so successful in country music is not just the variety and depth of our programming, but because you can engage with a song. Listeners are more actively "Thumbing" songs up or down on our Today's Country/The 615 station than they are on other genres or stations.



Michelle Kammerer (Amazon): Country remains a leading genre for Amazon Music and a true cornerstone of the service itself. Our team actively engages the genre's audience with a combination of curated and cutting-edge original country music programming, events, editorial content, and exclusives. Country music fans love our programming and genre-specific initiatives. New artists on the rise have been skyrocketing to the top of the charts, and it's been so exciting to come up with new ways to introduce them to new audiences around the world.



How is the relationship between country music and streaming unique when compared to other genres?



Margaret Hart (YouTube): The country genre has a long-standing history with radio to break artists. When streaming services began to take off, there was hesitation to embrace these platforms as much of the attention and focus from the genre was still at radio. While country continues to be reliant upon radio for breaking artists, year after year we see more stories of country artists who are breaking online first, which then leads to radio rotations. We really can't have a conversation in 2023 and NOT talk about Zach Bryan, Bailey Zimmerman, Megan Moroney and the list goes on. These artists are charting their own path, and it is changing the way our genre thinks about discovering and breaking talent.



Jay Liepis (Apple): Country music has always been mostly perceived as a genre for a U.S. audience; but with streaming, country music is now much more global and accessible to all and it's opening the doors for discovery and new fans. On Apple Music, we've seen meaningful growth for the genre in unexpected countries like Thailand, The Philippines, Germany, or South Africa. From 2020 to 2022, country music also saw a growth in streams nearly three times the rate of growth for hip-hop, and also faster than growth for Pop, R&B, Alternative and other major genres. None of this would have been possible before streaming broke down some of the barriers to entry.



Steve Blatter (SiriusXM/Pandora): While country consumers were later in adopting streaming compared to other genres, we've seen exponential and sustained growth in country music streamers since that shift. The largest terrestrial country radio station has about 800,000 listeners that tune in weekly. Pandora's most listened to country stations have more than a million listeners each week, and SiriusXM's Highway channel is multiples of that. The number of listeners streaming country music offerings just continues to grow.

The level of engagement among country music fans on our platforms is also significantly higher than we see in other genres. Not only do they come into streaming platforms and listen for a much longer duration than other genres, but they're more actively giving feedback on what they're hearing.



What about this combination of music and technology has worked so well in your mind?



Brittany Schaffer (Spotify): In a streaming world, artists no longer have to use a one-size fits all model for releasing music and connecting with fans, which allows for more creative, authentic, and frequent connections. They can include more than twelve songs on an album or never release an album at all, release a song alongside their tour announcement or as a surprise and delight for fans, build pre-release anticipation for an album with pre-save, or offer top listeners exclusive merchandise or the first opportunity to buy tickets for a tour. These opportunities allow listeners to consume more of the music they love, to build deeper and more meaningful connections with the artists, and to discover more music than ever, whether through mood and moment, genre, or algorithmic playlists that ultimately soundtrack their lives.



Margaret Hart (YouTube): The extension of the fan / artist relationship through technology has worked well in the country space to serve both the artist and the audience and create even more dedicated fan bases globally. Kylie Morgan is a great example. She was regularly using YouTube Shorts leading into the release of her 2022 EP “Songs to Say I Do To,” and on the heels of that increased activity and fan engagement, the song “If He Wanted to He Would” absolutely took off. To further amplify this content, we worked with her team on a YouTube Premium afterparty upon release of the “If He Wanted to He Would” music video. We love seeing stories like this where artists are connecting with their fans and growing their audiences organically and in ways that feel most authentic to them.



Steve Blatter (SiriusXM/Pandora): The incredible range of country music content available has made how you discover new music more important than ever before – that’s true for both artists and fans. By continually providing that input into their listening experience, country music fans on a discovery-driven platform like Pandora have more opportunities to hear newer artists and songs that they might not have been exposed to elsewhere. Not only does this improve a user’s listening experience and deliver a continually personalized listening experience, but it helps drive trends in the larger country market. There are amazing signals from this kind of engagement – if a record is going to be a hit, we can see it in Pandora’s Thumb activity after just a week or two of exposure, way before it cracks terrestrial radio.



Where does country music go from here? What are the trends that will define the next decade?



Jay Liepis (Apple): Country music has the biggest opportunity to grow, with streaming opening the doors for people of different ethnicities, race, gender, sexual orientation and geographical location. It's giving more artists an opportunity to be heard which in turn is bringing more fans together; fans that probably never knew they WERE fans of the music before. We have seen the genre growing consistently and our Today's Country playlist has been the No. 1 genre-specific playlist on Apple Music worldwide over the past year. In 2021 and 2022, more than 100 country songs also reached the Global Daily Top 100 -- more than double the number that reached the chart in the previous two years. We're also seeing more changes in leadership in the industry, and we'll continue to keep the course we've been charting at Apple Music, so I feel hopeful about the direction. It really is the most exciting time for country music.



Michelle Kammerer (Amazon): Amazon Music has remained a top destination for country music fans for over twenty years. Listeners can expect to see more campaigns for top-tier new releases and emerging artists, Amazon Original songs only for Amazon Music listeners, livestream events, and new editorial including video and podcast. Our efforts to create exciting opportunities for artists of all levels plus compelling content for their fans, will only continue moving forward.



Brittany Schaffer (Spotify): I believe the next decade in country music will be defined by an expansion in the sounds and styles that we define as country music, as well as by a shift in the ways in which artists are able to break through the noise to find an audience. These shifts will lead to more independent artists breaking through the noise, more artists from diverse backgrounds finding a strong foothold in the genre, and more diverse and engaged fans from around the world discovering or reconnecting with country music, ultimately making the genre more popular than ever.



What makes country music fans special?



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Michelle Kammerer (Amazon): Country music fans have shown extensive support for our programming throughout the years. In the U.S. specifically, country music has the highest number of plays per customer on Amazon Music than any other genre. This is due in large part to the many touch points we offer today's country fan in addition to hand-curated playlists and stations, livestream performances, editorial content, and exclusive artist merch.

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Jay Liepis (Apple): The fans are extremely passionate and loyal. They want to know about the artists' stories and how they personally relate to them. The artists aren't better than their fans; they are their equals. Luke Combs' Bootleggers fan club is a great example of how fans and artists connect in a special way. Luke is dedicated to them and they will turn up wherever and whenever Luke needs them to. It's pretty fascinating at times.

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Margaret Hart (YouTube): Country fans are often fans of the genre as a whole - CMA Fest in Nashville every June is a great example. In 2022, 80,000 fans attended this multi-day event in downtown Nashville. Performing artists range from someone who may be playing their first show to the three-night stadium show with headliners like Carrie Underwood and Keith Urban. As this fandom translates to streaming services, we are seeing fans who engage regularly with country artists across YouTube. Though the country consumer has traditionally tended to stay within the genre, as younger country fans engage on streaming services, we notice that they are more genre agnostic. Thanks to artists like Kacey Musgraves and Maren Morris, the lines of the country genre have been blurred, and many younger fans are incorporating country music into their listening habits alongside pop, Latin etc.



Tell us about two artists who may be less known but who you think are especially talented and deserve more recognition?



Jay Liepis (Apple):

Mickey Guyton
Roan Ash



Mickey
Guyton



Megan
Moroney



Steve Blatter (SiriusXM/Pandora):

Megan Moroney
Chase Matthew



Chase
Matthew



Brittany Schaffer (Spotify):

War & Treaty
Conner Smith



War & Treaty



Michelle Kammerer (Amazon):

BRELAND
Megan Moroney



BRELAND

Conner
Smith



Margaret Hart (YouTube):

Hailey Whitters
Caylee Hammack



Caylee
Hammack



Hailey
Whitters

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DiMA
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YouTube Music

About DiMA

DiMA is the leading organization advocating for the digital music innovations that have revolutionized the way music fans and artists connect. We represent the world's leading audio streaming companies, whose innovations are driving the economic engine that saved and revitalized the music industry, bringing it forward from the depths of the harm caused by piracy into a brighter future.

For more information visit our website: www.dima.org, or follow us on Twitter: [@digitalmediausa](https://twitter.com/digitalmediausa). For media inquiries, please email: media@dima.org.