51% of U.S. Adults Listen to Country Music

Over 129,000,000
ADULTS AGE 18+

9% Five Year Growth Rate

Source: 2018 GfK Consumer Life Survey; Country Listener defined as 'monthly or more'
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All Ages Connect With Country Music

129+ MILLION
AGE 18+

10+ MILLION
AGE 12-17

139+ MILLION
AGE 12+

Source: 2018 GIK Consumer Life Survey; 2017 GIK MRI Teen Study

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Country is Country-Wide

Percentage of Country Listeners in US Regions

49% 58% 54% 51% 49% 46%

Source: 2018 GfK Consumer Life Survey. Country Listener defined as ‘monthly or more’.
Country is Growing Across Major Markets and Small Towns Alike

High Growth Rates in Non-Traditional Regions (2014-2018 growth)

Source: Simmons Spring 2014 and 2018 NHCS Adult Study

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Country Is Becoming More Diverse

African-Americans
55%
5-Year Growth

Hispanics
15%
5-Year Growth

Source: Simmons Spring 2014 and 2018 NHCS Adult Study

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Snapshot of the Country Listener

- Own Home: 72% (67% gen pop)
- Employed Full-Time: 51% (48% gen pop)
- Employed as Executive/Professional*: 49% (46% gen pop)
- Households with Children: 47% (43% gen pop)
- Graduated College: 35% (36% gen pop)

Source: 2018 GIK Consumer Life Survey. *Percentage of those employed

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The Next Generation of High Earners Are Country Music Listeners

Country Music Listener Average Annual HHI*:

$81,100

v. $78,400 Gen Pop

65% of Millennials earning a HHI of $100k+ are Country Music Listeners

Country Listeners Are Tech Forward

- **82%** Use Smartphone (79% gen pop)
- **64%** Spend 5+ Hours Online Weekly (61% gen pop)
- **53%** Visit Social Networks Multiple Times a Day (49% gen pop)
- **25%** Spoke to Digital Assistant in Last Month (23% gen pop)
- **23%** Are Willing to Spend to Make Homes Smart (19% gen pop)

Source: Simmons Spring 2018 NHCS Adult Study; GfK Consumer Life RRUS 2017

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Key Takeaways

Today’s Country Music audience growth is organic and meaningful for today’s brands.

• Country reaches today’s music listeners in new and relevant ways evidenced by an overall audience 9% growth amid a stagnant U.S. population growth.
• Growth is significantly driven by non-traditional audiences - most notably Hispanics and African Americans – of which many are young adult listeners.
• Non-traditional markets and metropolitan cities are expanding the national appeal of the genre as growth rates continue to rise in these areas.

Country Music Listeners more likely manage professional careers, established households and family homes.

• Their beliefs in the American dream, economic achievement and the future support their optimism. Coupled with a strong discretionary income, they see “now as a good time to buy”.

Tech has taken over the audience which sees above average ownership and engagement with today’s must-have options and some emerging game-changers that is quickly migrating to their “mush have” tech list.