

**The Making of a Commercial Music
Radio Playlist:
A Primer**

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Introduction

Adult Canadians listen to about 21 hours of radio a week, tuning overwhelmingly to Canada's commercial music stations.

Thanks to Canadian content exhibition requirements, those stations will provide about 51,000 plays of Canadian music each week. But how do those songs get there? Who picks them, and how? The process is more complex, more exhaustive and more revealing of the state of the music industry in Canada than might appear at first sight.

In this special report, based on one-on-one telephone interviews with a representative sample of seven Program Directors from across Canada, the CAB takes you behind the scenes for a privileged view of how music playlists are born, how new songs are added, and of the challenges Program Directors face in meeting current Canadian content and French Vocal Music requirements.

Building a Playlist: How it's Done

Program Directors choose the music that gets played on Canadian commercial radio stations with extreme care. Whatever their format, and regardless of whether they broadcast in French or in English, they all share a singular obsession: loyalty to their listeners.

Keeping playlists fresh and compelling is a feat that requires constant adjustment to the mix of songs that go to air. To meet this challenge, Program Directors rely on objective research, audience feedback, and on their own instinctive "feel" for the music they believe their listeners have come to expect from their stations.

"We spend a lot of energy making sure that we play the right kind of music for our listeners, and that we listen to them," says Kent Newson, Program Director for Ottawa's "Majic 100," the city's leading Adult Contemporary (AC) station (CHUM).

"We listen to a lot of music. We really listen to everything – but at the end of the day it comes down to our ears and our gut."

Radio playlists are like living, breathing things that follow an organic life-cycle. Good program directors invest resources in making sure they know when to remove a song that has come to the end of its life, or "burned out." They build listening audiences and retain them by replacing those songs with newer music that resonates with listeners.

The aging rate of radio playlists (and thus the rate of replenishment) depends more than anything on the station's format. Astral's "Radio Énergie," one of Montréal's leading French Pop Rock stations, will add five new songs a week, says Program Director André Lallier, while "Radio Rock Détente," an AC station for which he is also responsible, only adds two to three new songs.

It is critical, to preserve listenership, that the new songs fit the texture and feel of the station's identity and branding.

"We have to be cautious," says Majic's Kent Newson. "It's all about what you play and how you play it. You want to make sure that every time you add a record, it's going to

connect with listeners. Our job is not to educate listeners; it's to play what they want to hear."

The fact is that new music is extremely risky for programmers. Audiences tire of the familiar, but new sounds, if too *unfamiliar*, risk turning them off. Stations therefore strive to achieve a difficult balance between familiarity and novelty.

"When a pop artist covers an old (jazz) standard, we look out for that," says Guy Banville, Managing Director and Vice President of Programming at Montréal's one-year-old "Couleur Jazz FM" (Radio-Nord).

Program Directors are under tremendous pressure: a lot is riding on the choices they make. The station's fortunes will rise or fall depending on how responsive they are to their listeners' changing needs and tastes. No-one can afford to damage the musical bond that draws listening audiences and keeps them coming back for more.

As a result, picking the playlist is serious business, and a lot of hard work goes into it. The process usually begins with a meeting of a small team including senior station staff - the "music committee" or "comité d'écoute."

"Our playlists are dictated by the target demographic we're aiming to hit," says André Lallier. "Énergie targets males aged 25-34, and Rock-Détente is for 30+. Each station has its own 'comité d'écoute' that meets weekly."

Such is the pattern at most stations. At Toronto's "The Edge" (CFNY-FM/Modern Rock - Corus), the selection process is particularly intense. The music committee is made up of four staff members of both sexes in their twenties (representing the target demographic), along with two more senior members of staff, and usually a young intern or guest.

Program Director Don Mitchell meets with music industry reps every Tuesday, and in these meetings he gets to hear the new playlist candidates - usually about 40 new songs split 20/20 between Canadian and international artists. Meantime, each committee member prepares by going through Canadian and US Modern Rock charts as well as playlists from the Toronto market, Soundscan¹ data, the station's current playlists and the new songs the major labels are promoting.

By the time the music meeting takes place at 3pm on Wednesdays everyone is expected to have an opinion, as well as their own suggestions.

"The debates at our meetings are very passionate," says Mitchell. "We argue about which songs should be played. We have a pretty diverse group and typically not all the ages agree with one another. There's a generation gap at times. There's also discussion of where we are going as a station."

Playlists can have an influence well beyond a station's listening area, says Gayle Zarbitany, Program Director at two Winnipeg stations, Rogers' CITI-FM (Classic Rock)

¹ Nielsen SoundScan is an information system that tracks sales of music and music video products throughout the United States and Canada. Sales data from point-of-sale cash registers is collected weekly from over 14,000 retail, mass merchant and non-traditional (on-line stores, venues, etc.) outlets. Weekly data is compiled and made available every Wednesday. Nielsen SoundScan is the sales source for the Billboard music charts. - Source: Nielsen.

and CKY-FM (AC). Zarbitany monitors closely how audiences in other Canadian cities are reacting to new music.

“On our AC station we weigh the song on a variety of factors,” she says. “We look at how it is doing in Canada, we look at mentor stations like ‘Light 96’ in Calgary, ‘QR’ in Montréal, or Ottawa’s ‘Majic 100’ and see what they are doing with the song. We also look at the playlists and Soundscan to see who’s getting most rotations – how many spins versus how many are bought.”

AC stations like Gayle’s that appeal mainly to women make sure that women are present in sufficient numbers on their music committees. At Ottawa’s “Majic 100,” anticipating the reactions of female listeners is vital in picking new additions to the playlist.

“For our format it’s always been a combination of two things: melody and lyrics,” Kent Newson says. “Women listen more intently to lyrics than guys do. Melody is huge. If it’s memorable and has lyrics that connect, that combination can be quite powerful.”

Mark Patric, Music Director and Assistant Program Director at Vancouver’s “JR-FM” (Country – Jim Pattison), says he looks for three qualities in selecting a new song.

“We look for production, quality of voice, and quality of lyric,” he says. “Any one of those three can ruin a song.”

Program Directors like Patric are not afraid to put the charts aside and trust their own instincts.

“We listen to every single Canadian release that comes into my office,” he says. “We listen to a lot of Canadian music. A lot of it doesn’t make it... and I (sometimes) make the decision myself.”

“It’s very zen-like in a way,” says Majic’s Newson, describing the way Program Directors make decisions. “I think there’s a myth out there that radio stations don’t spend a lot of time listening to music. We do. If it’s a good song, we’ll put it on, if it fits our format. You gotta really be in touch with the makeup of your audience in your city.”

But few directors allow the fate of their stations to hang on subjective appreciations alone.

“All new music is tested on air, first of all,” says Radio Énergie’s André Lallier, “After 75 to 100 spins we go to research.”

Audience research and testing play an important role in determining the lifespan of a song at most stations, though the degree to which a station can afford to use research tools often depends on the size of its market. For example, Montréal’s niche “Couleur Jazz” confines itself to call-outs, while other smaller stations rely on online surveys.

Mark Patric’s Vancouver country station tests new music on its playlist on a pool of 350 online participants every week. Once a year they do an auditorium test of their “gold” playlist.

“Audience testing determines what stays on the air,” he says. “But that doesn’t mean sometimes we don’t go with our gut. But the testing does pull a lot of weight.”

Toronto's "The Edge" uses online contests to recruit music testers. "We make them sign up," Don Mitchell says. "We send out invitations asking them to test music for us – if they agree we send out invitations to test 35 songs online – they get to say how much they like or dislike it, if they know the band and if they have gotten tired of it."

The testing comes back bi-weekly on Tuesday afternoons. "It comes into play at the music meeting," Mitchell says, "but we still take a chance when we add new music. We don't test anything that hasn't spun 100 spins. The testing tells us whether to keep playing something we added 4 weeks ago."

Challenges in Meeting Current CanCon/FVM Quotas

The challenges in meeting CanCon/FVM exhibition requirements vary by format, and across the language divide.

Don Mitchell credits the quality of available supply for the fact that a Modern Rock station like "The Edge" can afford to be an enthusiastic CanCon spinner.

"We don't have a problem with (the quotas)," he says. "We're probably running at 37% right now. There's really decent Canadian music out there in our format. I think our format is probably the most supportive of Canadian music. Other formats probably have bigger challenges."

Winnipeg's CITI-FM (Classic Rock) must be one of those formats, according to Gayle Zarbitany.

"In Classic Rock there is almost no new music," she says. "We play no new music unless it's a classic, or a classic artist - because we *will* play the new Neil Young. A *new* Canadian artist will not get on."

Zarbitany says she worries that the CRTC doesn't fully appreciate the repercussions of decisions it takes regarding CanCon requirements.

From the classic rock standpoint, she says, CanCon requirements combined with the limitations of inventory force the station to go outside established parameters, playing Canadian music that fits the station's texture but not the format. In the business, this is known as "crossover."

"You can't play too much with the formats because then you lose your identity, she says. "When I go outside the format I get yelled at. They (listeners) know their music!"

At 65%, the FVM requirement is much more onerous for French commercial radio, regardless of the format, Program Directors in Québec say.

"For Rock-Détente, it's less of a problem," says André Lallier. "But for Énergie, it is, because there aren't a lot of (Canadian) French language hits. Maybe there will be 3 or 4 of them at the same time, but we have to play 120 a day. There's just not enough francophone hits to feed the formats."

At Mark Patric's Vancouver country station, it's the quality of the CanCon offerings that is the major issue.

"Some people will hate to hear this," he says. "50% of the Canadian music tests in our bottom segment of testing. We have to play this music that people don't like – they may

not hate it, but they don't love it. We have to play music that our audience is just lukewarm about."

Back in Montréal, Lallier does not fault the quality of the francophone music on offer, in fact he rates it quite highly.

"The problem at Énergie is simply that our listeners are drawn to English songs," he says.

The end result from Lallier's perspective is the same as it is for Mark Patric, in another format, another language, at the opposite end of the country: music that fails to resonate.

"For young people, a large proportion of the songs we play in our formats are not the hits they tune in to hear," Lallier says. "It's kind of a no-man's land. We play them, but we don't get any reaction from them at all."

André St. Amand, Vice President of Programming at Montréal's "Rythme FM" (AC – Cogeco Diffusion) complains that due to the crossover effect, French language music stations in Quebec "end up sounding the same."

"Obviously, we play songs that are heard on CKMF and CKOI (Top 40)," he says. "We're all fishing in the same pond. We develop soft artists, and once they get known, the CHR stations start to play them and vice versa. At the end of the day, when francophone listeners complain, it's because they're always hearing the same thing (on the radio)."

English language stations seem to find it somewhat easier to resist crossover pressures.

"I'm not going to take Nickleback's new hit and play it on Majic," says Kent Newson. "It's a bit too rocky. If I was desperate, I would lean more to re-current or 'Gold' because it fits my format. But if there isn't enough new music, and you lean too much into re-current and 'Gold,' there is that burn factor that comes back."

The "burn factor" draws long and loud complaints in both English and French.

"At CITI, we burn out our music," says Gayle Zarbitany. "Every complaint I have ever got on this radio station for playing a song too much, it's always a Canadian band. We will play the crack out of them."

As an illustration, Zarbitany cites a song that Aerosmith put out that was originally thought to be CanCon until the CRTC disallowed it. All of a sudden, she says, every radio station in Canada dropped it, "because we had played that song to death."

Mark Patric agrees. "The main thing that we do to deal with CanCon is burn Canadian artists or a big song from one artist. The downside of that is a burn-out factor for that artist – it's a tune-out factor."

Patric cites Shania Twain, an artist who gets 2 out of 4 points, and so all her music is CanCon.

"People are just sick of her – because we've played the snot out of her. It was good quality, it was good music, but her audience just got madly sick of her."

Programmers are concerned about the impact of quotas on the sound of their stations and seem receptive to ideas to lessen "burn." A bonus system that rewards new music plays

with an effective reduction of the overall CanCon requirement would clearly be an advantage in some formats.

André St. Amand believes that “burn” has a negative impact on record sales and a limiting impact on performers’ careers.

“Everything francophone gets burned extraordinarily quickly in Quebec,” he says. “For example Rod Stewart and Elton John are stronger than ever, and their sales numbers are the same or better than they ever were. But look at Kevin Parent, whose first album sold 400,000. Two albums later, he can barely sell 40,000, because every radio station (in Québec) is playing Kevin Parent.”

As a result, St. Amand says, it’s tough for Québécois performers to achieve career longevity. “They have to penetrate international markets quickly to survive,” he says, citing Lara Fabian and Céline Dion as examples.

“Artists peak very quickly in Québec.”

Barriers to Increasing CanCon/FVM and Playing New Artists

For the most part, Program Directors at Canadian commercial music stations balk at suggestions that CanCon/FVM levels should be raised. In fact, most would like to see measures introduced to mitigate the impact of *current* levels. Some argue that rigid rules regarding what counts as CanCon need to be relaxed. Others suggest a bonus system might be one way to encourage the introduction of new Canadian artists and their music.

Mark Patric complains that there simply isn’t enough quality CanCon in the country format, while at the same time the definition of CanCon is so rigid that it is actually prejudicial to many Canadian performing artists.

There isn’t enough quality Canadian country music to fill 35% an hour, he says. “When we do have a great Canadian artist – like Terry Clark or Emerson Drive - their stuff is produced in the States, so it doesn’t count as CanCon.”

It’s a complaint that Kent Newson shares. “We should recognize that it’s not a bad thing for Canadian artists to collaborate with artists outside the country,” he says. “I think we need to be more lenient about that.”

The challenges Montréal French language stations face in meeting current FVM quotas are compounded by the fact that they compete for listeners with anglophone radio stations playing 100% English music, music that young Québécois audiences prefer.

Montréal’s radio market is unique in that three English language stations attract large numbers of francophone listeners, says André St. Amand, ranging from CHOM at 65 %, to MIX 96 at 60 %, and Q 92 at 45 %. And, he says, this is a serious barrier to putting new, home-grown artists on the air.

“Right now we have no reward for increasing our vulnerability vis-a-vis the anglophone stations when we play new artists,” he says. “A bonus system would be an advantage. We would be more competitive with the anglophone (stations). If a new song were to count for two or one-and-a-half, that would help open the door to break new ground.”

Guy Banville's "Couleur Jazz" station plays 25% of Category 2 music, which is subject to the higher 65% FVM quota, as opposed to 35% CanCon for instrumental. "It's good to promote Québec artists," he says, "but unfortunately we are shutting out others from the rest of the French-speaking world, especially France."

But "Couleur Jazz" has an effective defence against "burn." It has branded itself in its market, where it faces no commercial competition in its niche, as a station that will never repeat a song in a 24-hour period. This pushes Banville and his team to scour the clubs of Montréal's vibrant jazz scene for new material. While Banville is eager to try new artists out however, he is very mindful of the danger of "irritating" listeners with unfamiliar-sounding tracks that stray too far from the mainstream.

Stations have varying degrees of risk tolerance when it comes to new artists, and once again it seems to vary with the format. For example, Toronto's "The Edge" believes that being musically adventurous has helped it establish a brand that stands out from the competition.

"This station takes a lot of risks," says Don Mitchell. "We take chances on bands to try them out. You're dealing with a lot of no-name bands that might not work out. The audience expects it of us. We're 'The Edge'!"

"We have to develop new artists, and we take pride in it," Mitchell emphasizes. "Of course there will always be people in the industry who say we don't do enough (...) We're fans of Metric for example. We want to help them as much as we can. We have done shows with them, we believe in them."

Similarly, "Radio Énergie" invests heavily in promoting new artists, according to André Lallier. "We take more chances with the ones who are closest to our format," he says, citing Les Trois Accords, Corneille and Dumas as examples.

At Montréal's "Rythme FM," by contrast, it's just not possible to give preference to new music, says André St. Amand.

"If our product is not attractive enough, we will draw even fewer francophones. We are in tough competition with the English language stations."

Like many of his colleagues, Mark Patric is a little more forgiving when home-grown artists at the beginning of their careers bring him their songs, like Vancouver's Aaron Pritchett ("we were all over his music before he became successful") or the Wailing Jennies, a Winnipeg band whose first big hit was launched on "JR-FM."

Diverse Strategies for Success

For most stations, sticking closely to format and audience preferences is an essential component of their programming strategy. Testing and feedback are key to keeping them on the right track.

Mark Patric sums up the secret to programming success quite succinctly: "Playing the best music, playing the music that tests well, and the right amount, trying not to burn songs on our audience, staying loyal to our format."

The Making of a Commercial Music Radio Playlist: A Primer

Ventures into spoken word appear to be less critical for English language music stations. But in Québec, it's a different story. Success in Québec music radio is a factor of everything *but* the music, says André St. Amand.

“Our ability to stand out owes nothing to the music we play, but rather to the concepts of the shows we produce and the celebrities we put on the air. That's what gives us a different colour.”

St. Amand is emphatic on this point. “It's because the music is all the same from station to station. Here in Quebec we have our own (TV) soap opera stars (...) We put them on our top-rated (radio) shows, in the morning, at noon, on the drive-home shows. When people hear Kevin Parent on every station, choice boils down to the colour, the concept, or the personality of the presenter. And this adds enormously to our costs.”

As noted earlier, Toronto's “The Edge” encourages experimentation and brands itself as a risk taker, but there are limits to how far Don Mitchell is prepared to stick his neck out with new music.

“We'll never be a number one station with the music that we do, but we have to stay in the ballpark,” he cautions.

“We owe it to our shareholders to see to it that it's viable to run this station and stay competitive in this market, and that involves playing mainstream music.”

*

Radio Programmers: In Their Own Words

« Il y a deux formats musicaux au Québec. Top Forty et AC. C'est tout. Il y en a plein d'autres formats au Canada anglais et cinq fois plus aux États-unis. On peut pas penser qu'avec 65 % on peut faire une station de hip hop, rap, country. Impossible!

« Pourquoi il ne se produit rien d'autre? Pourquoi on a pas plus de hip hop en français? Parce qu'il n'y a pas de tribune de diffusion. Pourquoi pas de tribune? Parce qu'on peut pas avoir 65 % dans ce produit. C'est un cercle vicieux. Il faut flexibiliser le produit pour y arriver. »

– *André St. Amand, Vice-président à la programmation, CFGL-FM (AC) Montréal/Cogeco Diffusion.*

“For the most part I am not in a situation where I think there's too much great Canadian music out there and I should play some more of it.

“The quality has improved, and that there's a bigger quantity to choose from. But if we have to play more than 35% I might have to play stuff that wasn't of the same quality.”

- *Kent Newson, Program Director, Majic 100 (AC), CHUM/Ottawa.*

« Aujourd'hui la radio fait partie de la chaîne culturelle. Qu'on demande à la radio 65%, c'est une pression énorme, alors qu'on ne demande pas au magasin de disques qu'il mette 65% de pochettes de disques en vitrine. Les librairies ne sont pas obligées à vendre 65% de disques d'ici. »

– *Guy Banville, Directeur général et vice-président programmation, Couleur Jazz (Jazz) Montréal/Radio Nord*

“We have a quota, we have to fill it. You've got to come up with enough fresh material to keep it going. I have added a lot of mediocre bands just to keep my quota. I wouldn't play it if it wasn't Canadian. It's tougher in our format, unlike the top 40 (that's why CFNY is a god in Toronto!) But we can't all have the same format. Some of these songs I wouldn't even listen to if they were international songs.”

- *Gayle Zarbitany, Program Director, CITI-FM (Classic Rock) and CKY-FM (AC) Winnipeg/Rogers.*

« Le 65% fait en sorte que toutes les stations se ressemblent. Fermez vos yeux et syntonisez 'Rock-Détente' ou la nôtre, comme auditeur vous allez avoir de la difficulté à savoir laquelle est laquelle. Aux Etats-Unis, c'est évident. »

– *André St. Amand, Vice-président à la programmation, CFGL-FM (AC) Montréal/Cogeco Diffusion.*

“We should recognize that it's not a bad thing for Canadian artists to collaborate with artists outside the country. I think we need to be more lenient about that.”

“We have to be cautious. It's all about what you play and how you play it. You want to make sure that every time you add a record, it's going to connect with listeners. Our job is not to educate listeners; it's to play what they want to hear.”

- *Kent Newson, Program Director, Majic 100 (AC) CHUM/Ottawa.*