AUDIENCE NET

AUDIOMONITOR 2019: US

Music Biz Webinar

October 2019

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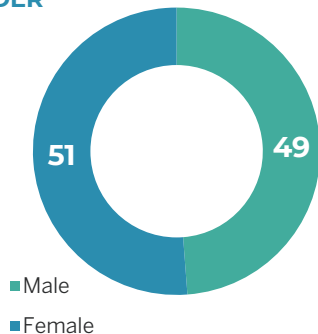
Sample

US SAMPLE

1,985 Respondents

A **statistically and demographically representative** sample of the **16+** year old US population.
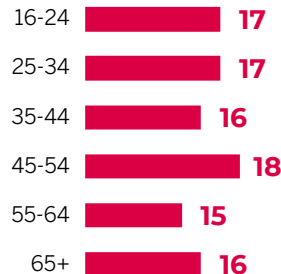
To guarantee national representation, quotas were set for: Gender, Age and Geographic Region, in accordance with the **2010 US census**. All participants had online access.

Fieldwork was completed in **October 2019**. The demographic profile of those surveyed was as follows:

GENDER

- Male 49
- Female 51

AGE

16-24	17
25-34	17
35-44	16
45-54	18
55-64	15
65+	16

REGION

NORTHEAST	**19%**
MIDWEST	**23%**
SOUTH	**36%**
WEST	**21%**

INCOME

< $20K	16
$20,000 – $29,999	10
$30,000 – $39,999	10
$40,000 – $49,999	10
$50,000 – $59,999	9
$60,000 – $69,999	6
$70,000 – $79,999	7
$80,000 – $99,999	9
$100,000 – $149,999	10
$150,000 and over	5
Would rather not say	7

PROFESSION

Employed full time	43
Employed part time	11
Unemployed and looking for work	7
Unemployed and not looking for work	12
Retired	19
Student	7
Rather not say	2
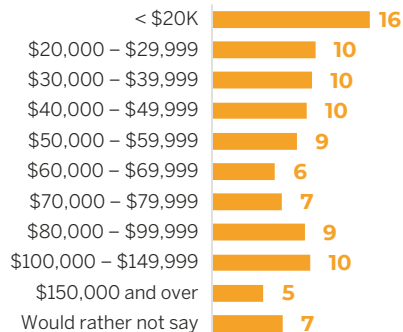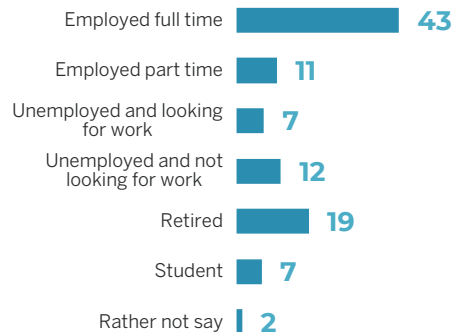
Section 2

Engagement with music

DAILY ENTERTAINMENT CONSUMPTION - BY AGE

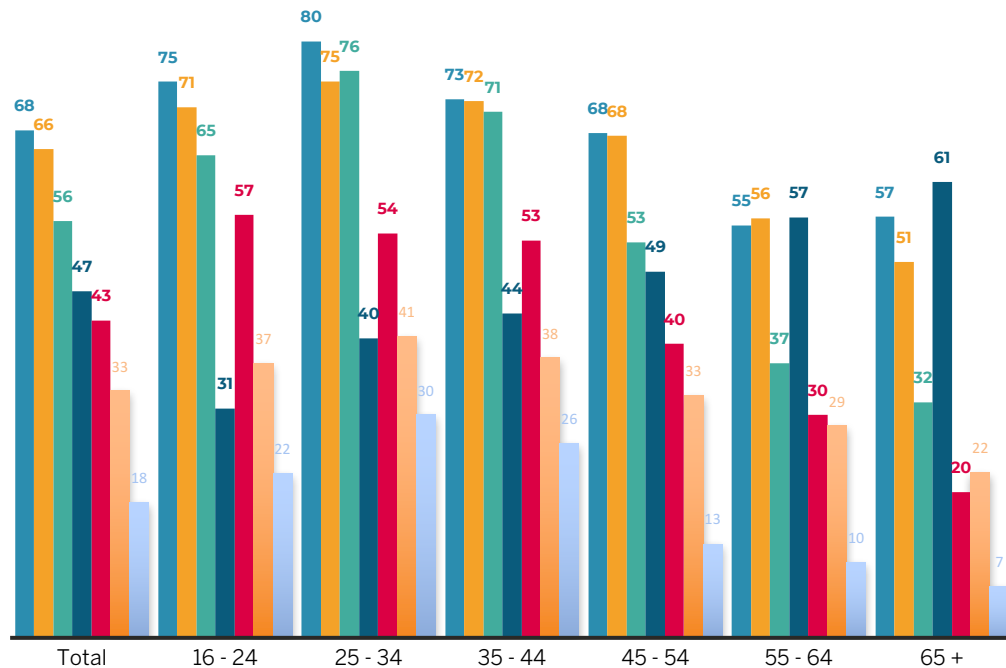Viewing social media, listening to music and watching TV/movies are daily entertainment rituals for most.

Social media and listening to music are the two most commonly engaged with activities on a daily basis.

Watching TV/movies is comparable to social media and music among most age groups, however sources of access differ. Younger groups (16-34) mostly watch online, while older ones (55+) lean towards offline viewing (i.e. terrestrial TV).

Playing video games on a daily basis is not just for the youngest age groups, with over half of all those aged between 16-44 doing so.

Podcasts seem especially popular among the young professional age group (25-34), with around a third (30%) listening on a daily basis.

Legend:
- View social media content
- Listen to music
- Watch episodes/movies on online video streaming platforms
- Watch terrestrial television
- Play video games
- Play sports/exercise
- Listen to podcasts

	Total	16 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65 +
View social media content	68	75	80	73	68	55	57
Listen to music	66	71	75	72	68	56	51
Watch episodes/movies on online video streaming platforms	56	65	76	71	53	37	32
Watch terrestrial television	47	31	40	44	49	57	61
Play video games	43	57	54	53	40	30	20
Play sports/exercise	33	37	41	38	33	29	22
Listen to podcasts	18	22	30	26	13	10	7

Question: Which, if any, of the following activities do you carry out on a typical day?
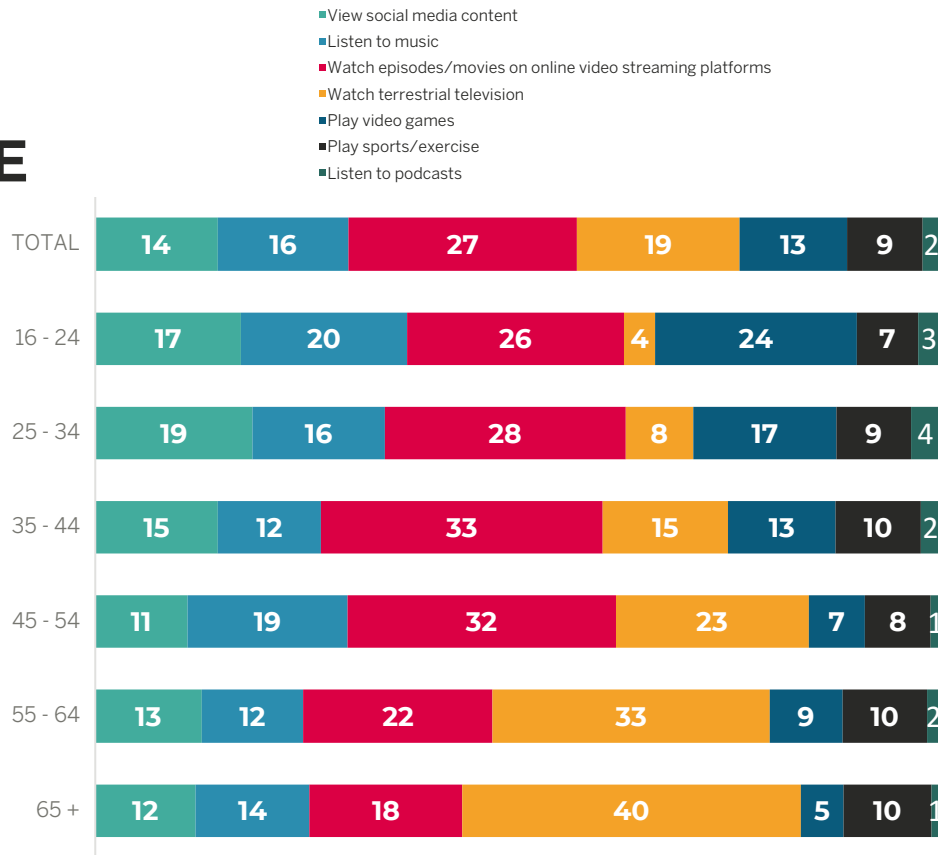Base: Total Sample (n = 1,985)

FAVORITE FORM OF ENTERTAINMENT - BY AGE

Watching TV/movies has the highest number of "likes".

When looking specifically at the favorite activity, for each group, **watching TV/movies trumps the others.**

This is especially noticeable for those aged 35+, where **watching TV/movies** (online or via terrestrial TV) is selected by half or more as their favorite.

For **younger groups** (16-34 year olds), the competition to be their favorite is a lot closer. Most notably, among 16-24 year olds, playing **video games** provides strong competition to watching episodes/movies online.

Legend:
- View social media content
- Listen to music
- Watch episodes/movies on online video streaming platforms
- Watch terrestrial television
- Play video games
- Play sports/exercise
- Listen to podcasts

Age	View social media content	Listen to music	Watch episodes/movies online	Watch terrestrial television	Play video games	Play sports/exercise	Listen to podcasts
TOTAL	14	16	27	19	13	9	2
16 - 24	17	20	26	4	24	7	3
25 - 34	19	16	28	8	17	9	4
35 - 44	15	12	33	15	13	10	2
45 - 54	11	19	32	23	7	8	1
55 - 64	13	12	22	33	9	10	2
65 +	12	14	18	40	5	10	1

Question: Of the activities you stated you do, which do you *like* to do the most?

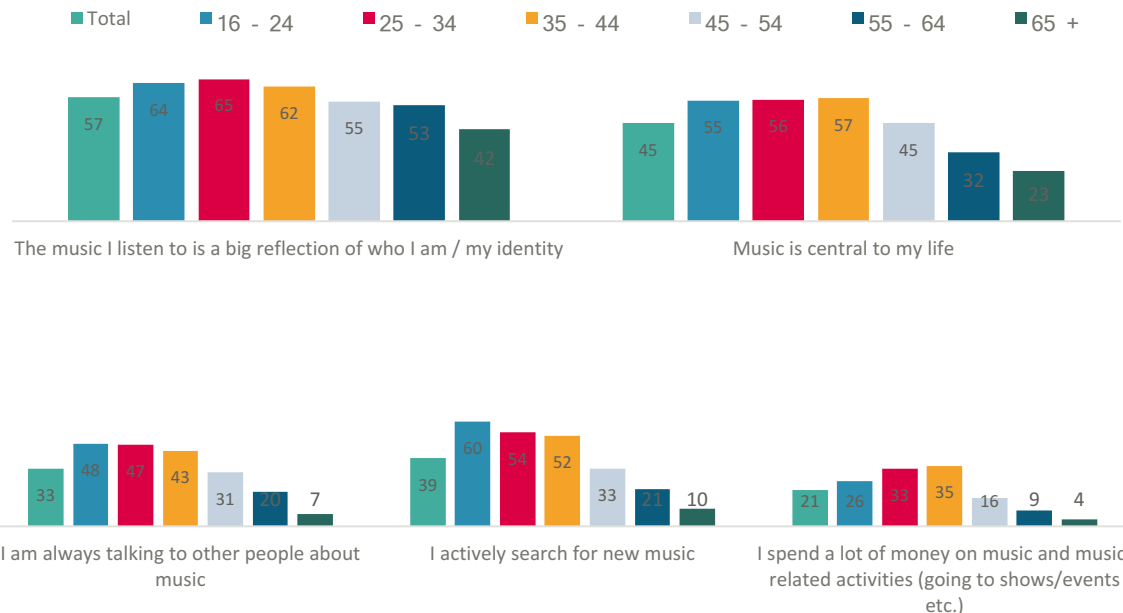Base: Those who do more than one activity (n = 1648)

PASSION FOR MUSIC

Music is a fundamental part of people's lives.

Over half (57%) believe music helps them to **express their identity**, with 45% saying that it is **central** to their life.

In terms of **active engagement**, 39% regularly search for **new music** and 21% feel they **spend** "a lot" on music and related activities.

Across all passion metrics, scores were higher for those aged **16-44**.

Legend: ■ Total ■ 16 - 24 ■ 25 - 34 ■ 35 - 44 ■ 45 - 54 ■ 55 - 64 ■ 65 +

The music I listen to is a big reflection of who I am / my identity
- Total: 57
- 16-24: 64
- 25-34: 65
- 35-44: 62
- 45-54: 55
- 55-64: 53
- 65+: 42

Music is central to my life
- Total: 45
- 16-24: 55
- 25-34: 56
- 35-44: 57
- 45-54: 45
- 55-64: 32
- 65+: 23

I am always talking to other people about music
- Total: 33
- 16-24: 48
- 25-34: 47
- 35-44: 43
- 45-54: 31
- 55-64: 20
- 65+: 7

I actively search for new music
- Total: 39
- 16-24: 60
- 25-34: 54
- 35-44: 52
- 45-54: 33
- 55-64: 21
- 65+: 10

I spend a lot of money on music and music-related activities (going to shows/events etc.)
- Total: 21
- 16-24: 26
- 25-34: 33
- 35-44: 35
- 45-54: 16
- 55-64: 9
- 65+: 4

Question: How much do you agree or disagree that each of the following statements describes you?
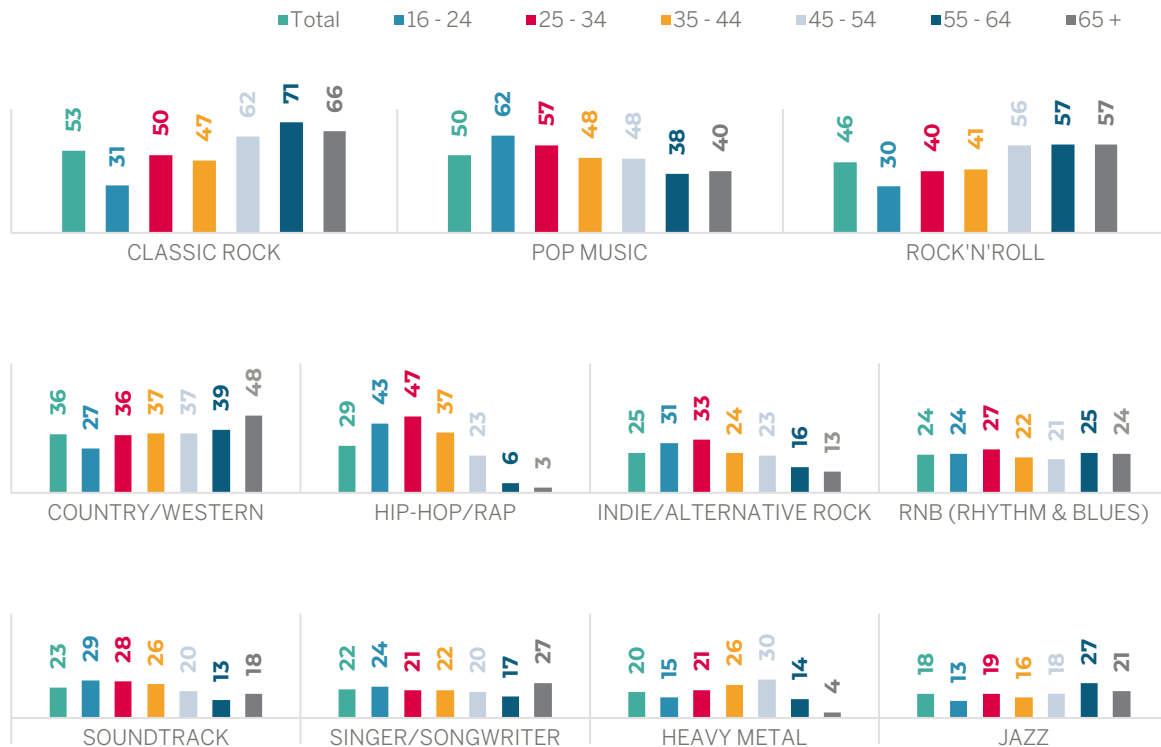
Base: Total Sample (n = 1,985)

TOP GENRES BY AGE

Total Sample

Rock genres (excluding Indie/Alternative) and Country tended to skew older, with preference generally increasing with age.

Pop and Hip-Hop/Rap, by contrast, had a younger bias.

Most other genres had a relatively even distribution across age groups.

Legend: ■ Total ■ 16 - 24 ■ 25 - 34 ■ 35 - 44 ■ 45 - 54 ■ 55 - 64 ■ 65 +

CLASSIC ROCK — 53, 31, 50, 47, 62, 71, 66

POP MUSIC — 50, 62, 57, 48, 48, 38, 40

ROCK'N'ROLL — 46, 30, 40, 41, 56, 57, 57

COUNTRY/WESTERN — 36, 27, 36, 37, 37, 39, 48

HIP-HOP/RAP — 29, 43, 47, 37, 23, 6, 3

INDIE/ALTERNATIVE ROCK — 25, 31, 33, 24, 23, 16, 13

RNB (RHYTHM & BLUES) — 24, 24, 27, 22, 21, 25, 24

SOUNDTRACK — 23, 29, 28, 26, 20, 13, 18

SINGER/SONGWRITER — 22, 24, 21, 22, 20, 17, 27

HEAVY METAL — 20, 15, 21, 26, 30, 14, 4

JAZZ — 18, 13, 19, 16, 18, 27, 21

Which of the following types of music do you generally like?
Base: Base: All those who listen to music on a 'typical' day (n = 1,291)

Section 3
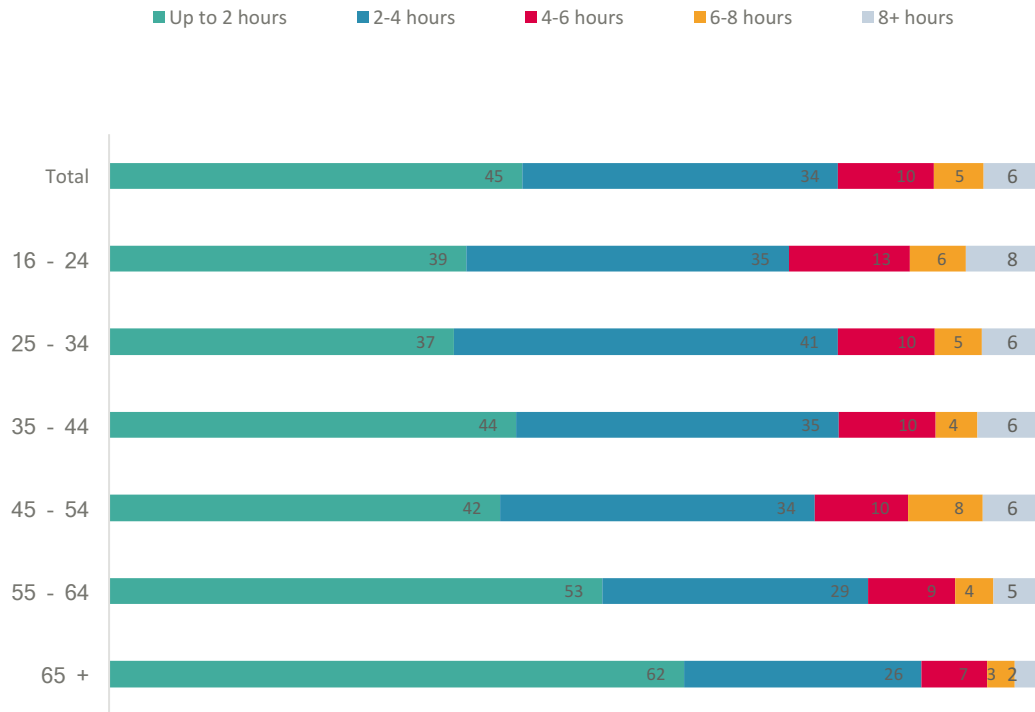
Broad Music Consumption Habits

DAILY TIME SPENT LISTENING

Up to 4 hours is the magic number.

In a typical day, **most (79%) spent up to 4 hours** listening to music.

Daily music listening times were **longest for the youngest age group** (16-24 year olds), with over a quarter (27%) spending more than 4 hours per day doing so.

Interestingly, the **second longest** listening times were for 45-54 year olds, with 24% reporting listening for over 4 hours.

■ Up to 2 hours ■ 2-4 hours ■ 4-6 hours ■ 6-8 hours ■ 8+ hours

Age	Up to 2 hours	2-4 hours	4-6 hours	6-8 hours	8+ hours
Total	45	34	10	5	6
16 - 24	39	35	13	6	8
25 - 34	37	41	10	5	6
35 - 44	44	35	10	4	6
45 - 54	42	34	10	8	6
55 - 64	53	29	9	4	5
65 +	62	26	7	3	2

To the nearest half hour, how long do you normally spend listening to music in a typical day?
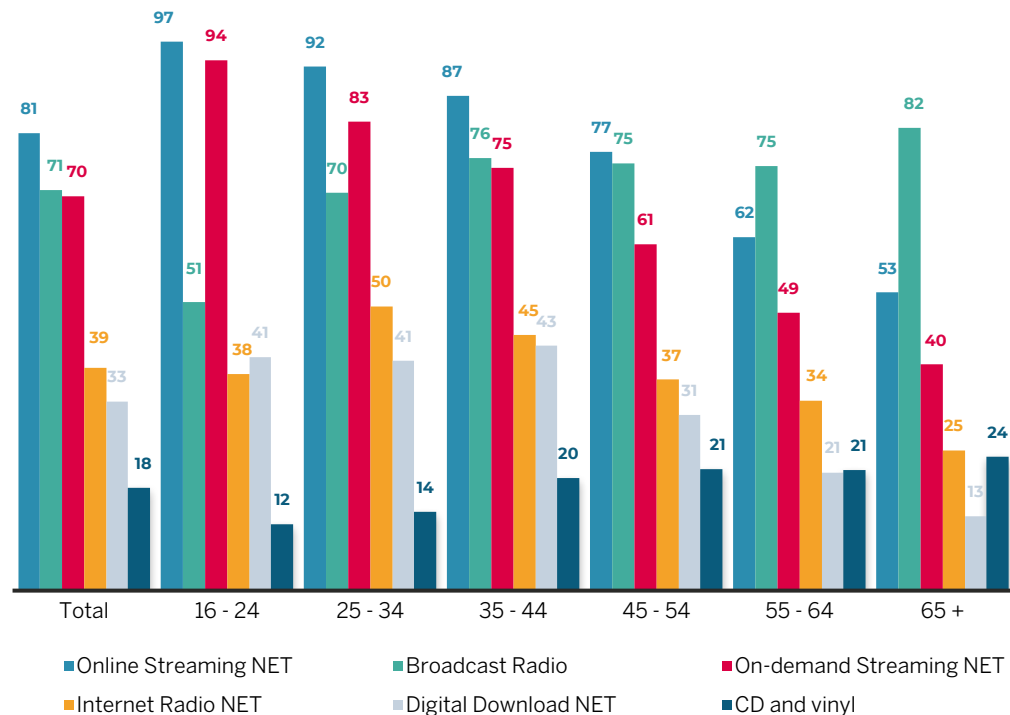Base: Base: All those who listen to music on a 'typical' day (n = 1,251)

WEEKLY (BROAD) FORMAT REACH

Reach of On-demand Streaming and Broadcast Radio is similar.

Among the total sample of music listeners, **Online Streaming** (i.e. On-demand Streaming +Internet Radio) has the highest reach (81%).

Broadcast Radio and **On-demand Streaming** tied for second place (71% and 70% respectively).

The **other formats** are some way behind. **Internet Radio** (39%) and **Digital Downloads** (33%) reach over a third, with **physical formats** (i.e. CD and vinyl) at 18%.

Legend:
- Online Streaming NET
- Broadcast Radio
- On-demand Streaming NET
- Internet Radio NET
- Digital Download NET
- CD and vinyl

	Total	16 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65 +
Online Streaming NET	81	97	92	87	77	62	53
Broadcast Radio	71	51	70	76	75	75	82
On-demand Streaming NET	70	94	83	75	61	49	40
Internet Radio NET	39	38	50	45	37	34	25
Digital Download NET	33	41	41	43	31	21	13
CD and vinyl	18	12	14	20	21	21	24

To the nearest half hour, how long do you normally spend listening to music in a typical day?

Base: Base: All those who listen to music on a 'typical' day (n = 1,251)
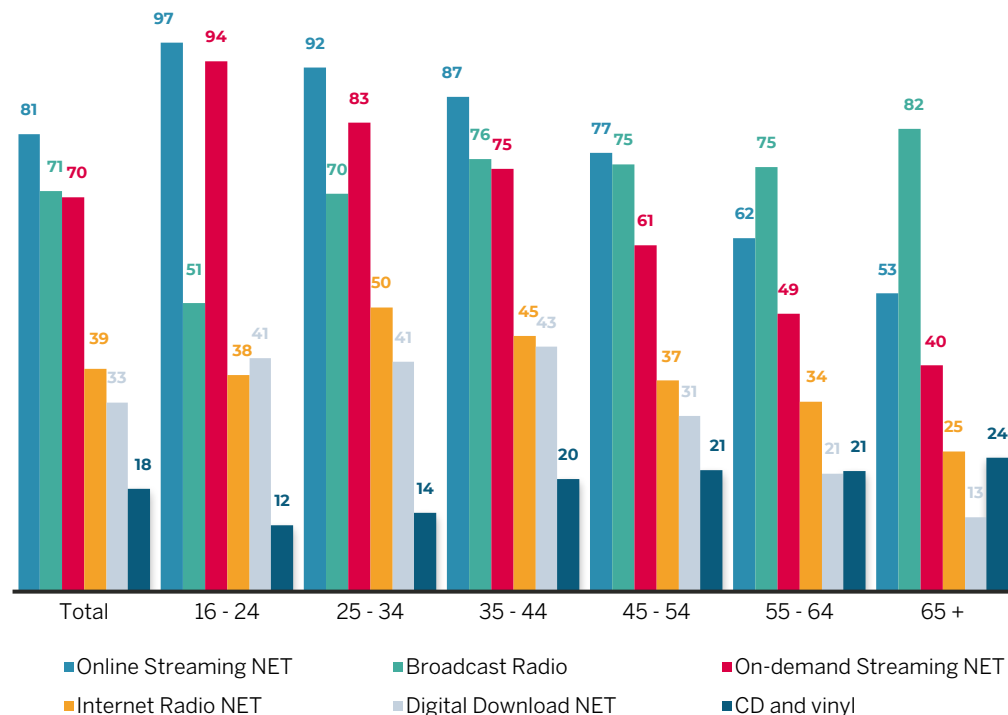
WEEKLY (BROAD) FORMAT REACH - BY AGE

Reach of formats differs considerably across older and younger age groups.

Looking at **Broadcast Radio vs. On-demand Streaming**, results change considerably across age groups:

- For those aged **16-24, On-demand Streaming (94%) is ahead** by some way, with broadcast radio coming in at 51%
- Among 25-34 year olds, reach of **On-demand Streaming (83%) is still noticeably ahead** of Broadcast Radio (70%)
- Reach for the two is **matched among 35-44 year olds**, before **Broadcast Radio starts to dominate among those aged 45+**

Across **other formats**, while general trends remain similar across the sample, some have greater reach among certain age groups:

- Accessing music via **Digital Downloads** is slightly higher for those aged 16-44
- Reach of **Internet Radio** higher among 25—44 year olds
- **Physical formats** (i.e. CD and vinyl) higher among older groups

Legend: Online Streaming NET · Broadcast Radio · On-demand Streaming NET · Internet Radio NET · Digital Download NET · CD and vinyl

To the nearest half hour, how long do you normally spend listening to music in a typical day?

Base: Base: All those who listen to music on a 'typical' day (n = 1,251)
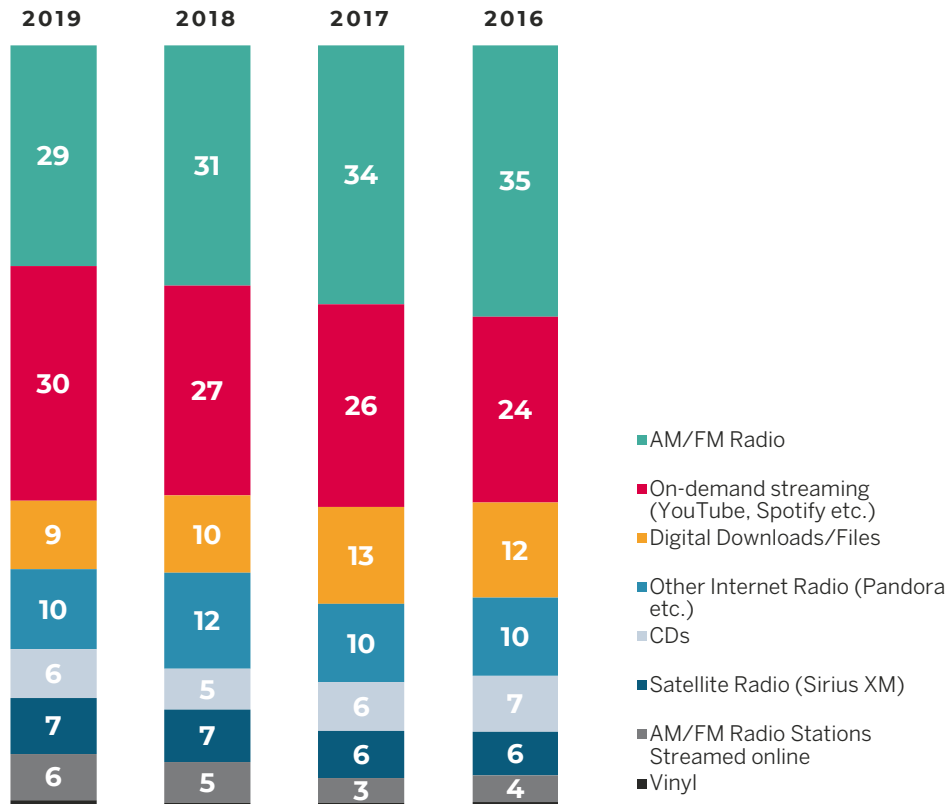
DAILY FORMAT SHARE OF LISTENING - YOY

Is On-demand Streaming about to take the top spot?!

AM/FM Radio and **On-demand Streaming are still neck and neck**, with both making up similar shares of listening.

However, with the **trend over the last few years** continuing (i.e. On-demand Streaming increasing and AM/FM Radio losing share), this year On-demand Streaming matched AM/FM Radio's share.

Other formats each accounted for 10% or less of the daily sharing of listening.

	2019	2018	2017	2016
AM/FM Radio	29	31	34	35
On-demand streaming (YouTube, Spotify etc.)	30	27	26	24
Digital Downloads/Files	9	10	13	12
Other Internet Radio (Pandora etc.)	10	12	10	10
CDs	6	5	6	7
Satellite Radio (Sirius XM)	7	7	6	6
AM/FM Radio Stations Streamed online	6	5	3	4

Legend:
- AM/FM Radio
- On-demand streaming (YouTube, Spotify etc.)
- Digital Downloads/Files
- Other Internet Radio (Pandora etc.)
- CDs
- Satellite Radio (Sirius XM)
- AM/FM Radio Stations Streamed online
- Vinyl

To the nearest 15 minutes, how is your music listening time normally split between the following sources?
All who listen to music
2019 Base: All those who listen to music on a 'typical' day (n = 1,250)

# DAILY FORMAT SHARE OF LISTENING - BY AGE

AM/FM Radio and On-demand Streaming each dominate share of daily listening for different generations.

AM/FM Radio dominates share of listening for those aged 45+, while **On-demand Streaming** is clearly ahead among 16-34 year olds. Shares for the two are fairly even among those aged 35-44.

The highest proportional share of listening, by some way, held by any format was for **On-demand Streaming** among 16-24 year olds (57%).

Other notable differences:

- Share for **Other Internet Radio (Pandora etc.)** higher among 25-34 year olds (14% vs. 10%)

- Share of **Satellite Radio and CDs** slightly higher for older age groups
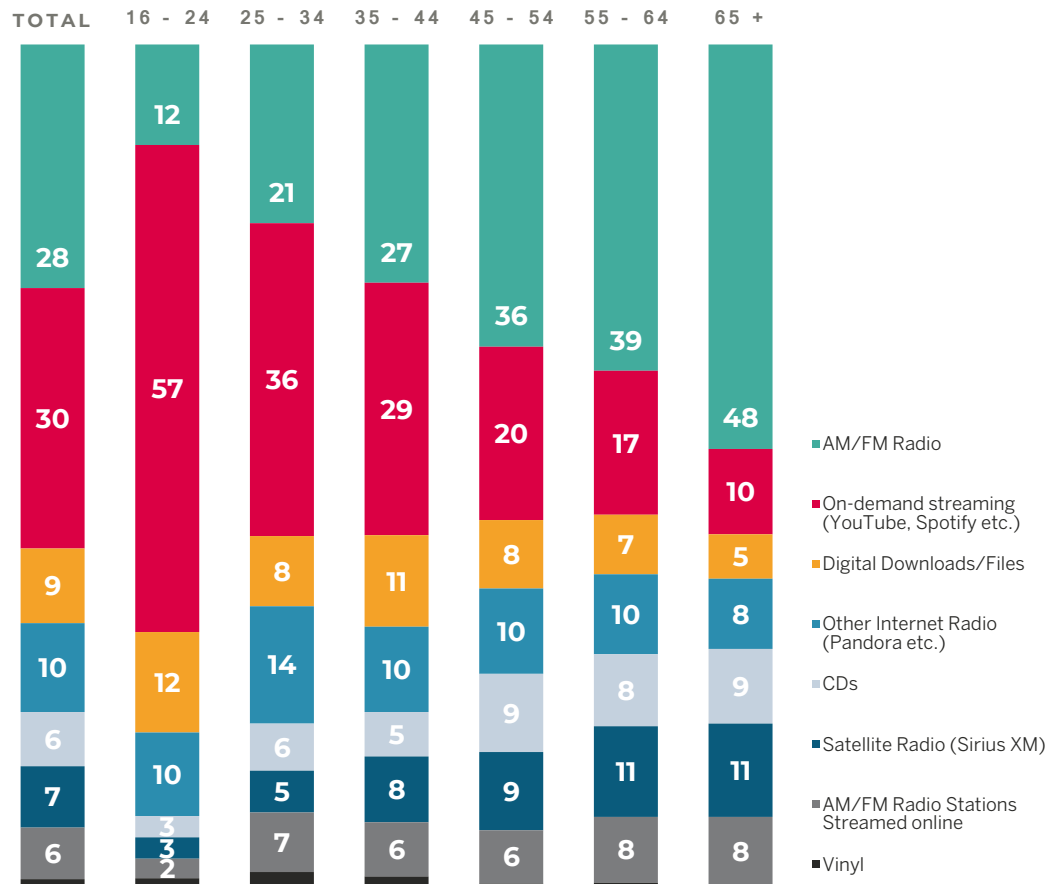
Question: To the nearest 15 minutes, how is your music listening time normally split between the following sources?

Base: All those who listen to music on a 'typical' day (n = 1,250 Respondents)

Section 4

Devices used for music consumption

DEVICE OWNERSHIP

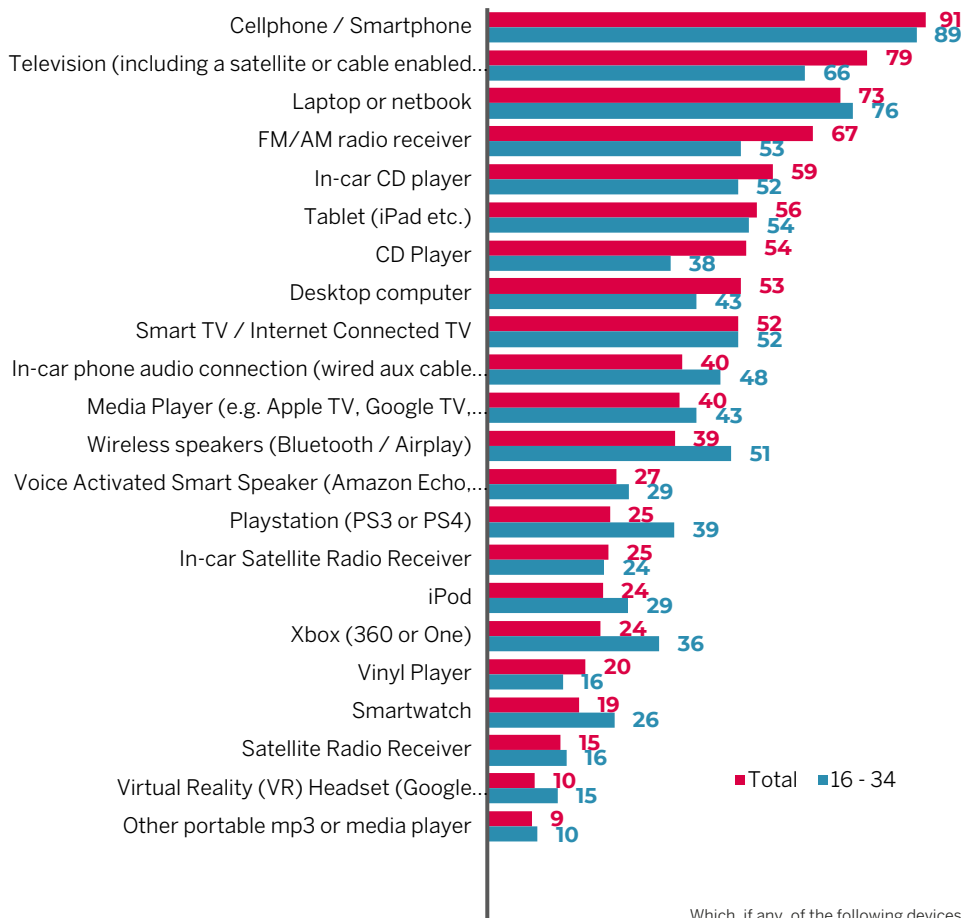## Smartphones lead the way.

Cellphone/Smartphone most commonly owned device by some way.

Similar ownership levels for **Televisions and Laptops** (around three-quarters).

Ownership of **AM/FM radio receivers** considerably lower among 16-34 year olds (53% vs. 67%).

Some other notable **age differences**, particularly in relation to **gaming devices** and having a **smartwatch**, with 16-34 year olds more likely to own them.

Interestingly, while **Wireless Speakers** were more common among 16-34 year olds, the proportion owning a **Smart (Voice) Speaker** was comparable with the total sample (27%).

Device	Total	16 - 34
Cellphone / Smartphone	91	89
Television (including a satellite or cable enabled…	79	66
Laptop or netbook	73	76
FM/AM radio receiver	67	53
In-car CD player	59	52
Tablet (iPad etc.)	56	54
CD Player	54	38
Desktop computer	53	43
Smart TV / Internet Connected TV	52	52
In-car phone audio connection (wired aux cable…	40	48
Media Player (e.g. Apple TV, Google TV,…	40	43
Wireless speakers (Bluetooth / Airplay)	39	51
Voice Activated Smart Speaker (Amazon Echo,…	27	29
Playstation (PS3 or PS4)	25	39
In-car Satellite Radio Receiver	25	24
iPod	24	29
Xbox (360 or One)	24	36
Vinyl Player	20	16
Smartwatch	19	26
Satellite Radio Receiver	15	16
Virtual Reality (VR) Headset (Google…	10	15
Other portable mp3 or media player	9	10

Which, if any, of the following devices do you own?
Base: Total sample (n = 1985)
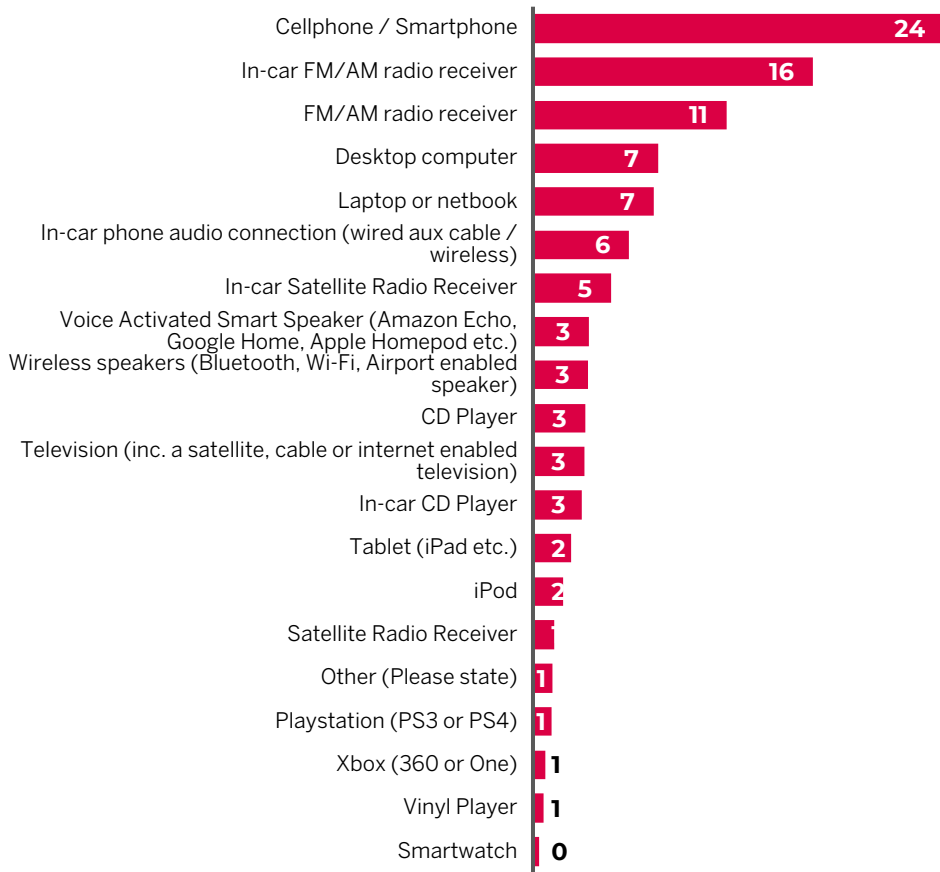
DAILY DEVICE SHARE OF LISTENING

Cellphones/Smartphones and Radio Receivers dominate share of daily listening.

When looking at individual devices, **Cellphones/ Smartphones** had the highest share of time spent listening to music (24%).

In-car FM/AM Radio Receivers came second (16%), with general FM/AM Radio Receivers following at 11%.

When all radio receivers are combined (i.e. In-car FM/AM Radio Receiver, FM/AM Radio Receiver, In-car Satellite Radio Receiver, Satellite Radio Receiver) **these account for a larger share of listening (at 33%) than Cellphones/ Smartphones**.

No other single device made up more than a 7% share of daily listening.

Device	Share
Cellphone / Smartphone	24
In-car FM/AM radio receiver	16
FM/AM radio receiver	11
Desktop computer	7
Laptop or netbook	7
In-car phone audio connection (wired aux cable / wireless)	6
In-car Satellite Radio Receiver	5
Voice Activated Smart Speaker (Amazon Echo, Google Home, Apple Homepod etc.)	3
Wireless speakers (Bluetooth, Wi-Fi, Airport enabled speaker)	3
CD Player	3
Television (inc. a satellite, cable or internet enabled television)	3
In-car CD Player	3
Tablet (iPad etc.)	2
iPod	2
Satellite Radio Receiver	1
Other (Please state)	1
Playstation (PS3 or PS4)	1
Xbox (360 or One)	1
Vinyl Player	1
Smartwatch	0

To the nearest 15 minutes, how is your music listening normally split between the following devices?

Base: All those who listen to music on a 'typical' day (n = 1206)
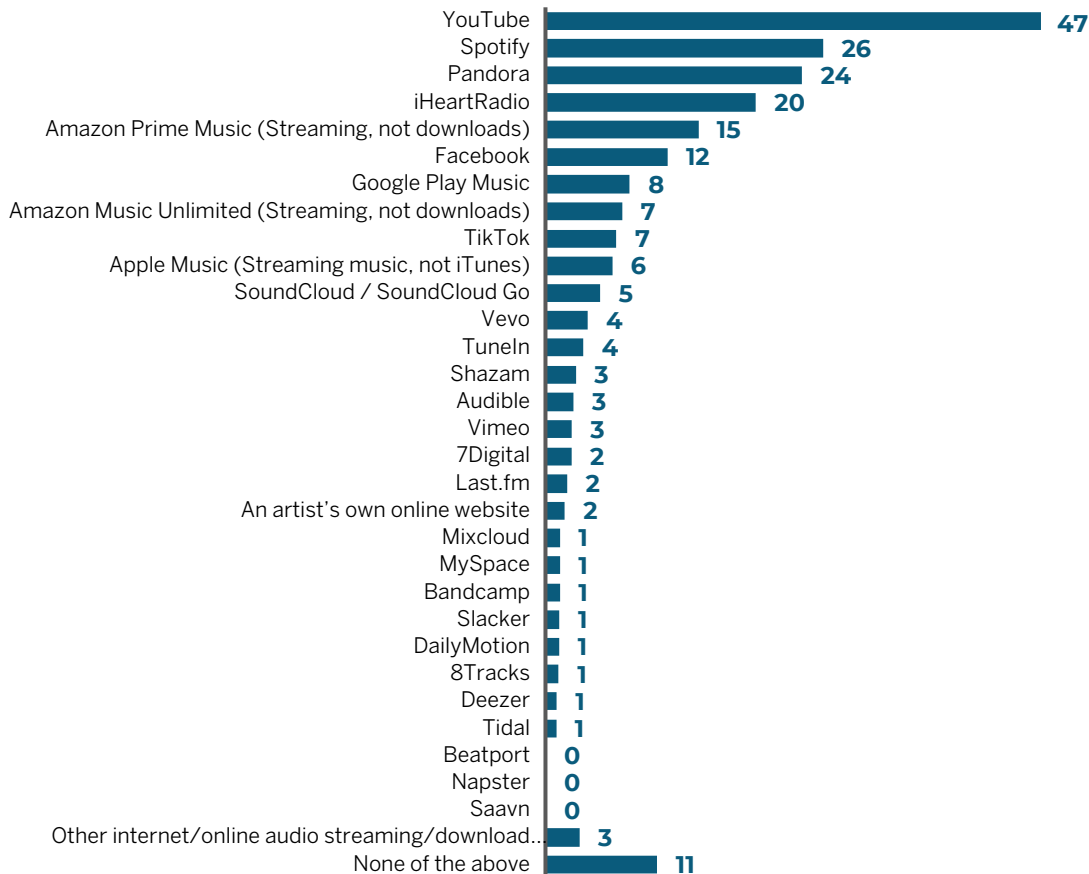
Section 5

A focus on online streaming

WEEKLY PLATFORM REACH

A hierarchy of platform reach, with YouTube dominating at the top.

YouTube has the highest weekly reach, by some way, of all online streaming platforms tested. Almost half (47%) of respondents use YouTube for audio consumption on a weekly basis.

Spotify (26%), Pandora (23%) and iHeartRadio (20%) reach more than 2 in 10, with the other platforms slightly behind.

Platform	Value
YouTube	47
Spotify	26
Pandora	24
iHeartRadio	20
Amazon Prime Music (Streaming, not downloads)	15
Facebook	12
Google Play Music	8
Amazon Music Unlimited (Streaming, not downloads)	7
TikTok	7
Apple Music (Streaming music, not iTunes)	6
SoundCloud / SoundCloud Go	5
Vevo	4
TuneIn	4
Shazam	3
Audible	3
Vimeo	3
7Digital	2
Last.fm	2
An artist's own online website	2
Mixcloud	1
MySpace	1
Bandcamp	1
Slacker	1
DailyMotion	1
8Tracks	1
Deezer	1
Tidal	1
Beatport	0
Napster	0
Saavn	0
Other internet/online audio streaming/download...	3
None of the above	11

Which, if any, of the following have you used in order to listen to audio content (music or speech) for five minutes or more at any one time during the last seven days?

Base: All who listen to music on a 'typical' day (n = 1291 Respondents)

WEEKLY PLATFORM REACH – BY AGE

Reach for YouTube and Spotify increases dramatically among younger age groups.
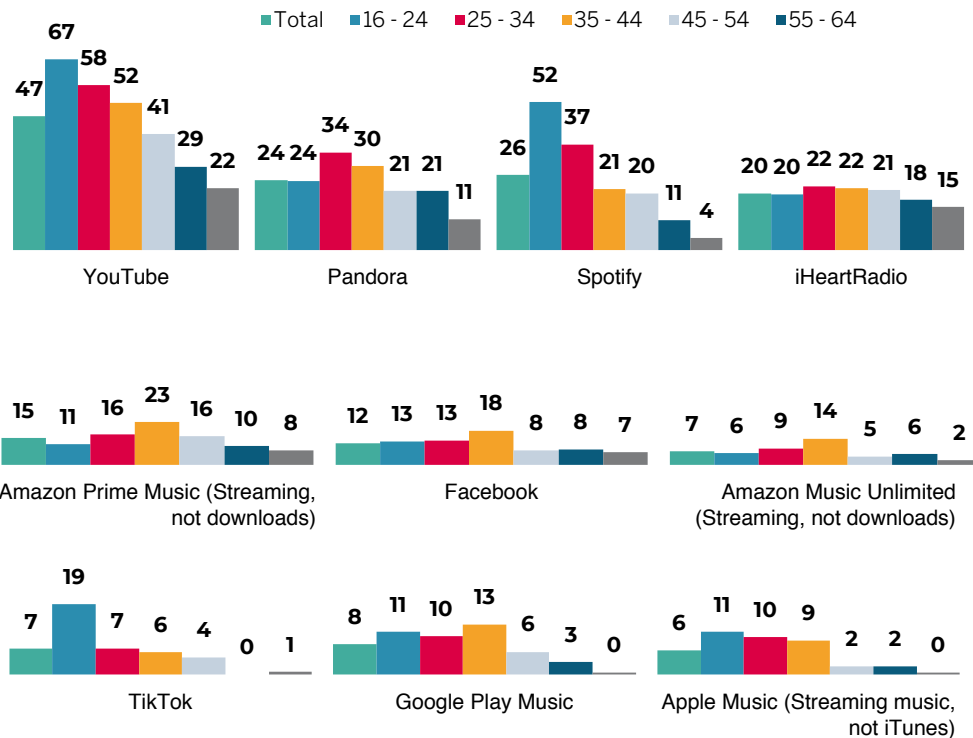
For most platforms, reach across age groups was fairly consistent, with some notable peaks (within approximately 10% of the total population score).

However, both **YouTube and Spotify saw dramatic increases across younger age groups**:

- YouTube's reach increases to **67% among 16-24 year olds**, with 25-34 year olds at 58%

- **Spotify's reach** is over half (52%) among **16-24 year olds**, with 25-34 year olds at 37%

Looking at **Pandora**, reach is notably higher among 25-34 year olds and 35-44 year olds (34% and 30% respectively).

Reach skews younger for Apple Music and also, notably, for TikTok.

Legend: ■ Total ■ 16 - 24 ■ 25 - 34 ■ 35 - 44 ■ 45 - 54 ■ 55 - 64

YouTube: 47, 67, 58, 52, 41, 29, 22
Pandora: 24, 24, 34, 30, 21, 21, 11
Spotify: 26, 52, 37, 21, 20, 11, 4
iHeartRadio: 20, 20, 22, 22, 21, 18, 15

Amazon Prime Music (Streaming, not downloads): 15, 11, 16, 23, 16, 10, 8
Facebook: 12, 13, 13, 18, 8, 8, 7
Amazon Music Unlimited (Streaming, not downloads): 7, 6, 9, 14, 5, 6, 2

TikTok: 7, 19, 7, 6, 4, 0, 1
Google Play Music: 8, 11, 10, 13, 6, 3, 0
Apple Music (Streaming music, not iTunes): 6, 11, 10, 9, 2, 2, 0

Which, if any, of the following have you used in order to listen to audio content (music or speech) for five minutes or more at any one time during the last seven days?
Base: All who listen to music on a 'typical' day (n = 1291 Respondents)

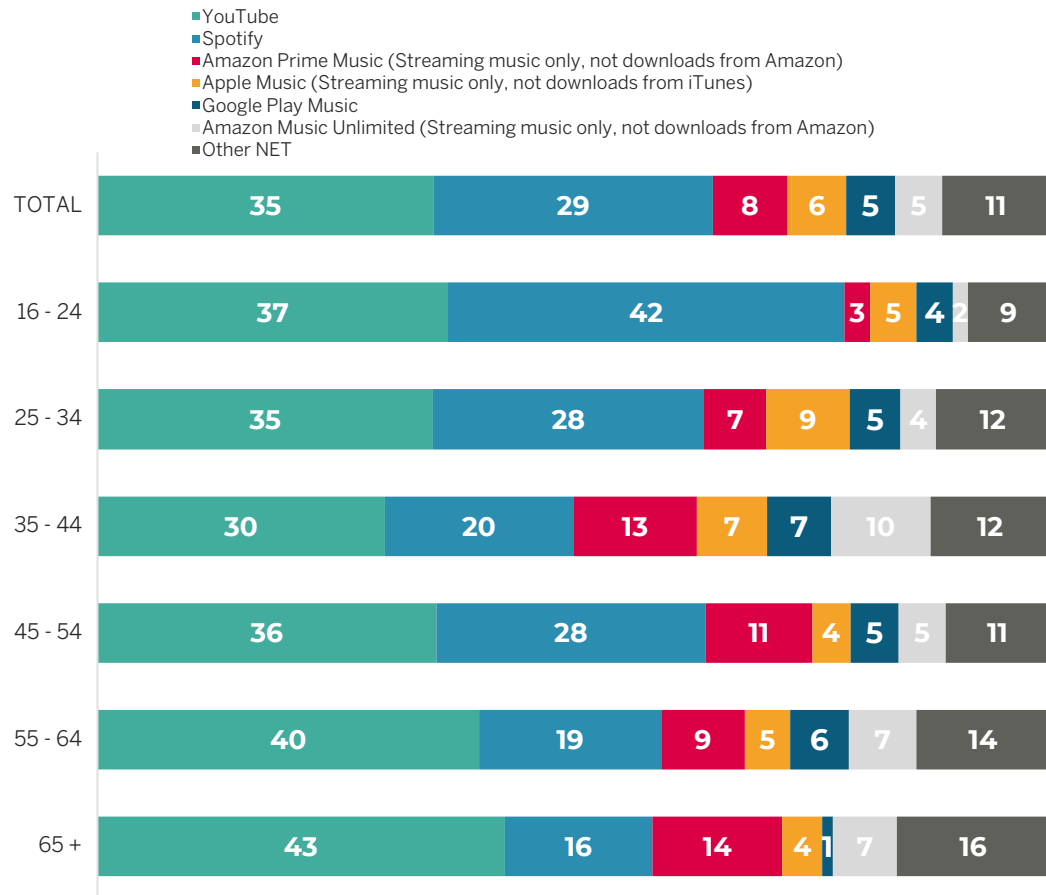# ON-DEMAND STREAMING SHARE OF LISTENING - BY PLATFORM

YouTube and Spotify battling it out for share of listening among younger age groups.

Overall, **YouTube and Spotify make-up a high proportion (64%) of the share of listening via On-demand Streaming platforms**, with no other individual platform contributing more than 11%.

Looking at the **youngest age groups** (16-24 year olds), the combined share of YouTube and Spotify is even higher (79%).

The nature of competition between YouTube and Spotify differs somewhat across age groups. At the total sample level, YouTube slightly leads Spotify by a 6% margin. Interestingly**, Spotify leapfrogs YouTube among 16-24 year olds** (42% vs. 37%). Spotify then goes on to lose traction among older age groups.

Shares across other platforms remain fairly consistent across age groups.

Legend:
- YouTube
- Spotify
- Amazon Prime Music (Streaming music only, not downloads from Amazon)
- Apple Music (Streaming music only, not downloads from iTunes)
- Google Play Music
- Amazon Music Unlimited (Streaming music only, not downloads from Amazon)
- Other NET

| Age	YouTube	Spotify	Amazon Prime Music	Apple Music	Google Play Music	Amazon Music Unlimited	Other NET
TOTAL	35	29	8	6	5	5	11
16 - 24	37	42	3	5	4	2	9
25 - 34	35	28	7	9	5	4	12
35 - 44	30	20	13	7	7	10	12
45 - 54	36	28	11	4	5	5	11
55 - 64	40	19	9	5	6	7	14
65 +	43	16	14	4	1	7	16

Question: How is your time spent listening to 'on-demand music streaming' normally split between the following sources?

Other NET: 'Other', SoundCloud, Deezer, Napster, Tidal

Base: Those who listen to 'on-demand' streaming (n = 649)

Section 6

Podcasts
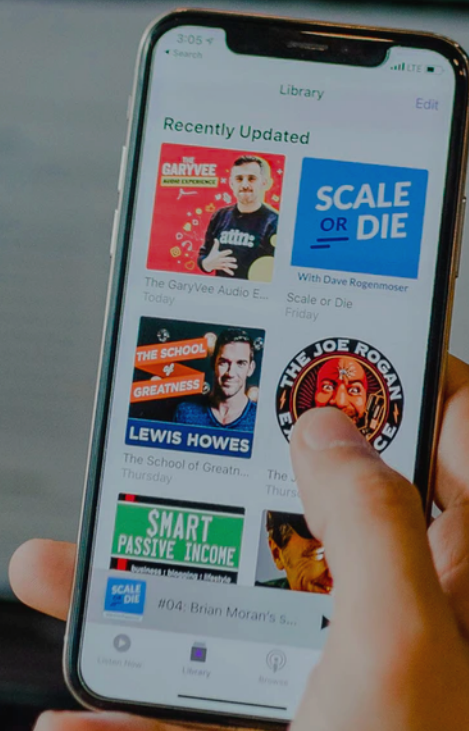
DAILY REACH AND SHARE OF LISTENING BY PLATFORM

Daily podcast listening especially popular among 16-44 year olds.
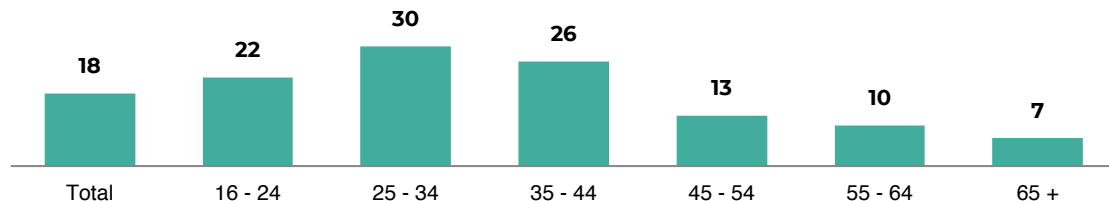
Approximately **a fifth (18%) of the total sample** listed to podcasts on a typical day.

Daily podcast listening is **notably higher among those under 45**, rising to around a quarter, and peaking among 25-34 year olds (30%).
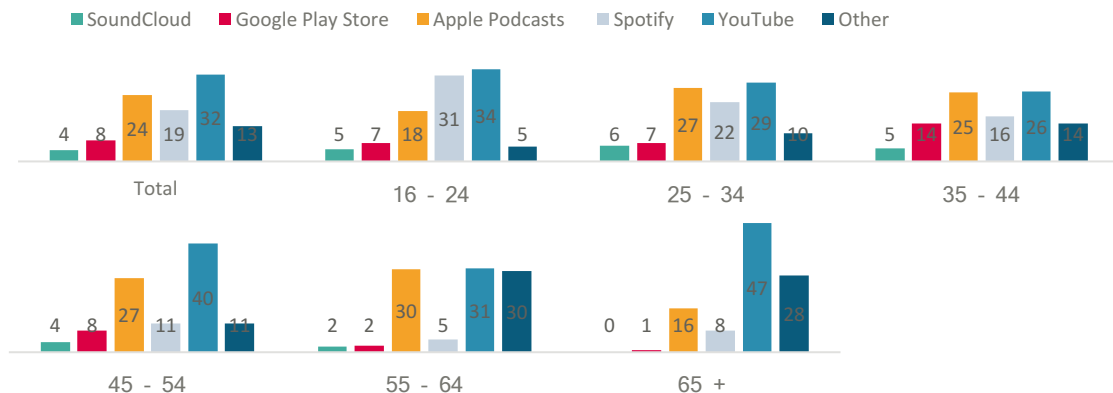
YouTube accounted for the highest share of listening (32%) across the podcast platforms tested, by some way. **Apple Podcasts** followed at 24%, with **Spotify** coming in third (19%).

No other single platform accounted for more than 8% of listening.

PODCAST REACH

Total	16 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65 +
18	22	30	26	13	10	7

SHARE OF LISTENING BY PLATFORM

Legend: ■ SoundCloud ■ Google Play Store ■ Apple Podcasts ■ Spotify ■ YouTube ■ Other

	SoundCloud	Google Play Store	Apple Podcasts	Spotify	YouTube	Other
Total	4	8	24	19	32	13
16 - 24	5	7	18	31	34	5
25 - 34	6	7	27	22	29	10
35 - 44	5	14	25	16	26	14
45 - 54	4	8	27	11	40	11
55 - 64	2	2	30	5	31	30
65 +	0	1	16	8	47	28

Questions: Which, if any, of the following activities do you carry out on a typical day? Base: Total sample (n = 1985)
How is your podcast listening time typically split between the following sources? Base: Those who listen to podcasts (n = 356)
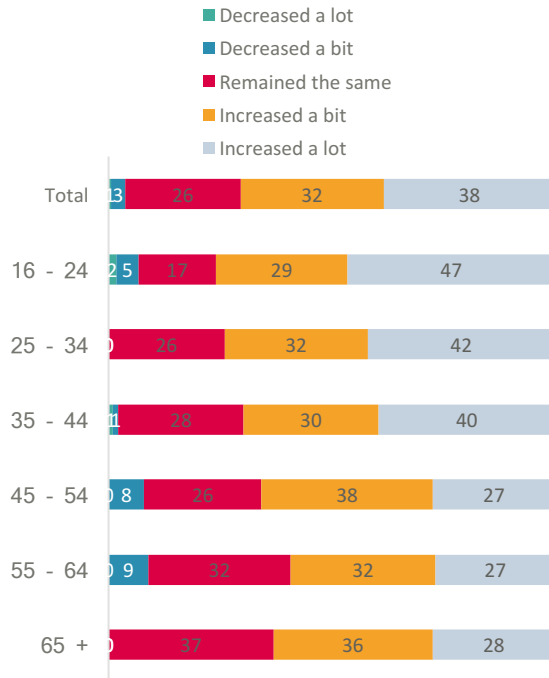
TIME SPENT LISTENING TO PODCASTS

Podcast listening is on the rise, and rapidly.

Almost **three quarters (70%) indicated that the amount of time they spend listening to podcasts had increased in the last year**, with as many as 38% saying it had increased "a lot".
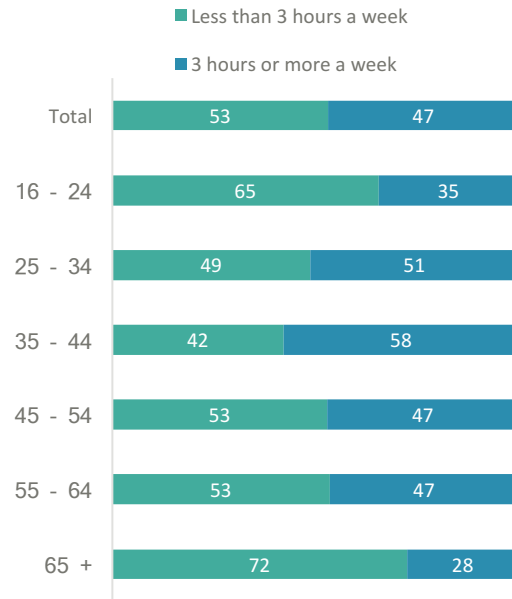
Increased listening was **especially common among those aged 16-34**, with approximately three quarters indicating this. Increased engagement seems to be especially high among those aged 16-24, with the lowest proportion (17%) saying the time they spend had remained consistent.

Overall, there is a relatively **even split between those who spend more than 3 hours a week listening to podcasts (47%) and those who listen for less time (53%).** Lower listening time was more common in the youngest (16-24) and oldest (65+) age groups.

CHANGES IN TSL IN PAST YEAR

Legend:
- Decreased a lot
- Decreased a bit
- Remained the same
- Increased a bit
- Increased a lot

Group	Decreased a lot	Decreased a bit	Remained the same	Increased a bit	Increased a lot
Total		3	26	32	38
16 - 24	2	5	17	29	47
25 - 34	0		26	32	42
35 - 44	1	1	28	30	40
45 - 54	0	8	26	38	27
55 - 64	0	9	32	32	27
65 +	0		37	36	28

WEEKLY LISTENING - HOURS

Legend:
- Less than 3 hours a week
- 3 hours or more a week

Group	Less than 3 hours a week	3 hours or more a week
Total	53	47
16 - 24	65	35
25 - 34	49	51
35 - 44	42	58
45 - 54	53	47
55 - 64	53	47
65 +	72	28

PODCAST GENRES

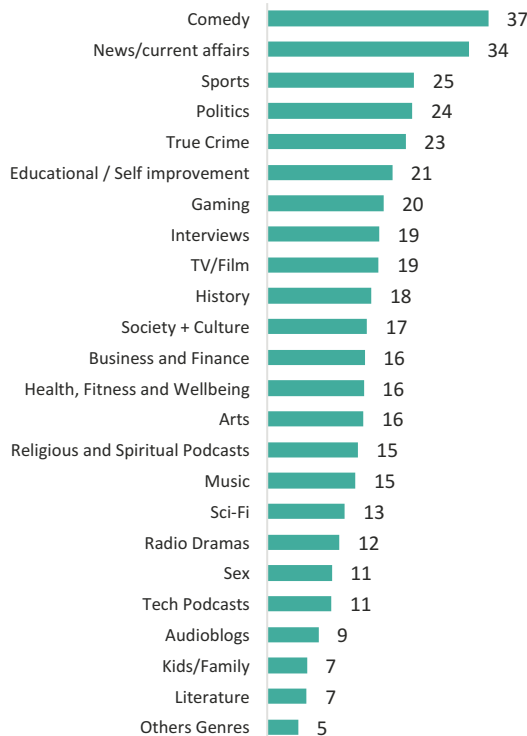## Comedy and news/current affairs podcasts dominate.

No single genre was selected by more than 37% of the sample, suggesting that **tastes are somewhat varied**.

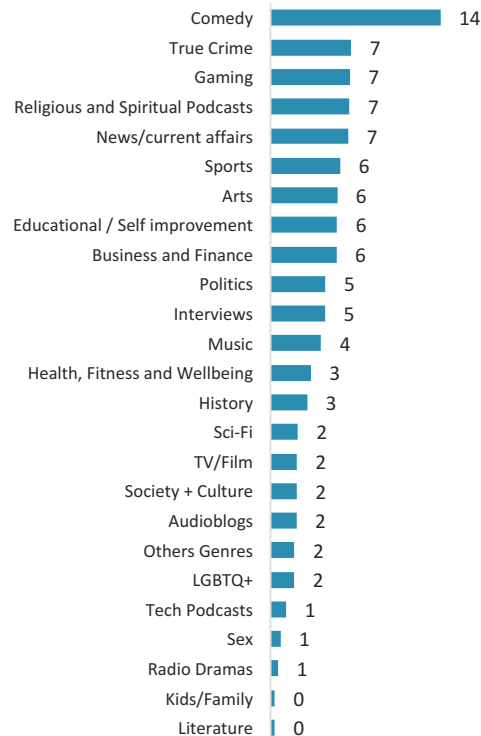Interestingly, the **top two genres were quite different in theme**: comedy (37%) and news/current affairs (34%).

The **remaining genres** were selected by a quarter or fewer.

When looking at the **favorite podcast genre**, comedy (14%) emerges as the top by some way.

Podcasts Genres Listened To

Genre	Value
Comedy	37
News/current affairs	34
Sports	25
Politics	24
True Crime	23
Educational / Self improvement	21
Gaming	20
Interviews	19
TV/Film	19
History	18
Society + Culture	17
Business and Finance	16
Health, Fitness and Wellbeing	16
Arts	16
Religious and Spiritual Podcasts	15
Music	15
Sci-Fi	13
Radio Dramas	12
Sex	11
Tech Podcasts	11
Audioblogs	9
Kids/Family	7
Literature	7
Others Genres	5

Favorite genre

| Genre	Value
Comedy	14
True Crime	7
Gaming	7
Religious and Spiritual Podcasts	7
News/current affairs	7
Sports	6
Arts	6
Educational / Self improvement	6
Business and Finance	6
Politics	5
Interviews	5
Music	4
Health, Fitness and Wellbeing	3
History	3
Sci-Fi	2
TV/Film	2
Society + Culture	2
Audioblogs	2
Others Genres	2
LGBTQ+	2
Tech Podcasts	1
Sex	1
Radio Dramas	1
Kids/Family	0
Literature	0

Questions: Which of the following genres of podcasts do you listen to? Base: All who listen to podcasts (n = 359)
Which are your Top 3 Base: All who listen to more than one type of podcast (n = 285)
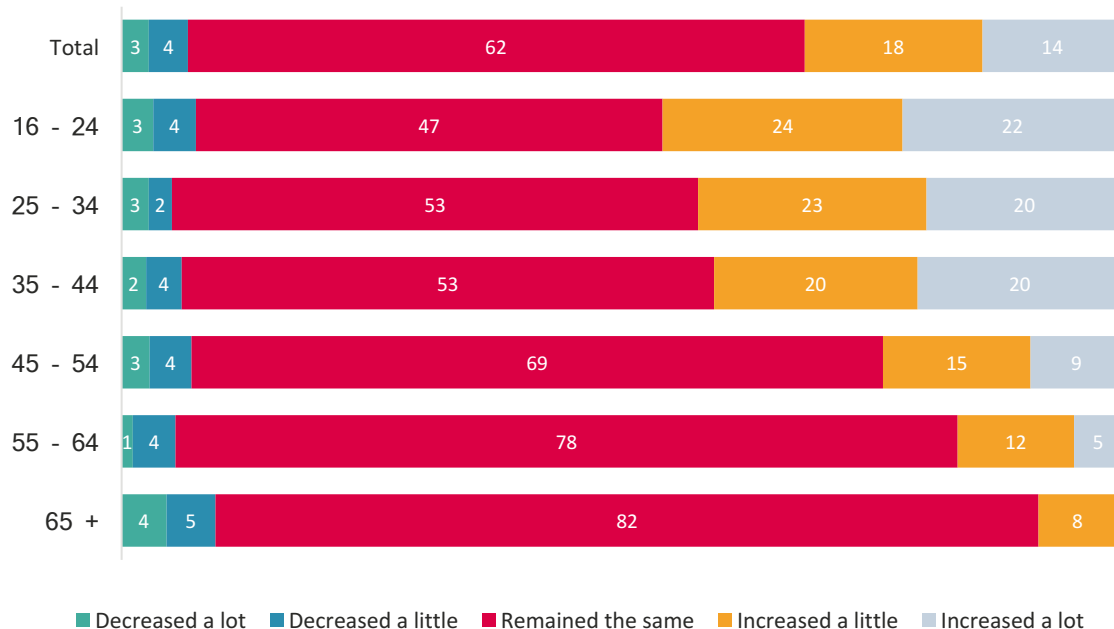
Section 7

World Music
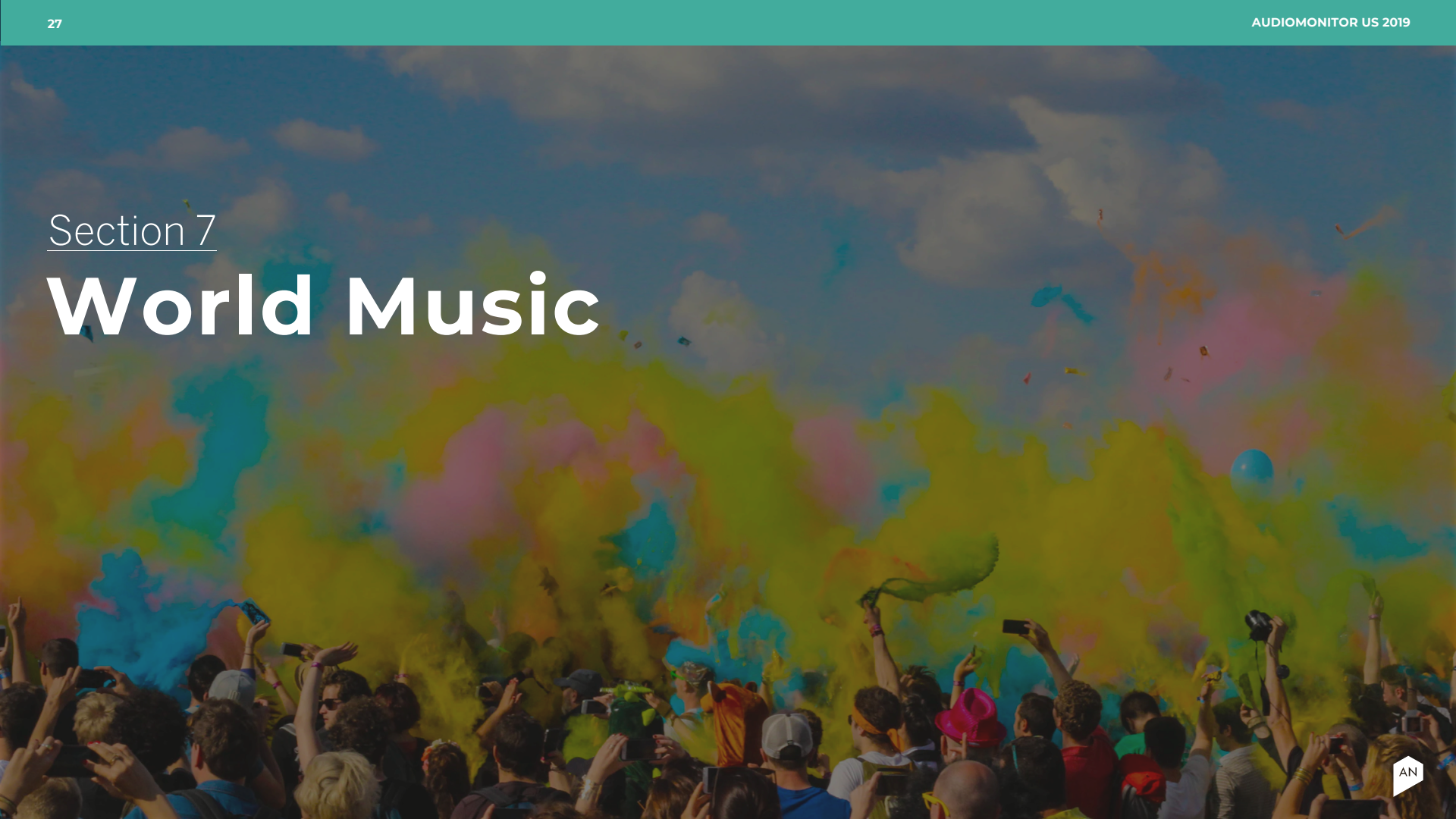
LEVEL OF INTEREST: WORLD MUSIC/SOUNDS

Younger age groups likely to champion world music/sounds in coming years.

Around **a third (32%) indicated** that their interest in world music/sounds had increased in the last two years.

Interest was **notably higher among those aged 16-44** (40%+).

In the last two years, would you say your interest in world music/sounds has...

Age	Decreased a lot	Decreased a little	Remained the same	Increased a little	Increased a lot
Total	3	4	62	18	14
16 - 24	3	4	47	24	22
25 - 34	3	2	53	23	20
35 - 44	2	4	53	20	20
45 - 54	3	4	69	15	9
55 - 64	1	4	78	12	5
65 +	4	5	82	8	1

LEVEL OF INTEREST: MUSIC IN DIFFERENT LANGUAGES

Increase in interest in different languages only slightly lower than for general world music/sounds.

The level of increased interest in music in different (i.e. non-native) languages in the last two years was **only slightly lower than for world music/sounds** more generally (26% and 32% respectively).

Increases were again **more common among those aged 16-44** (between 34-39%).

And, in the last two years, would you say your interest in listening to music in a different language (i.e. not in your native language) has...

	Decreased a lot	Decreased a little	Remained the same	Increased a little	Increased a lot
Total	9	3	62	15	11
16 - 24	7	4	50	23	16
25 - 34	6	4	56	16	18
35 - 44	6	3	54	21	16
45 - 54	11	2	70	10	6
55 - 64	12	2	73	9	4
65 +	11	2	77	8	

■ Decreased a lot ■ Decreased a little ■ Remained the same ■ Increased a little ■ Increased a lot
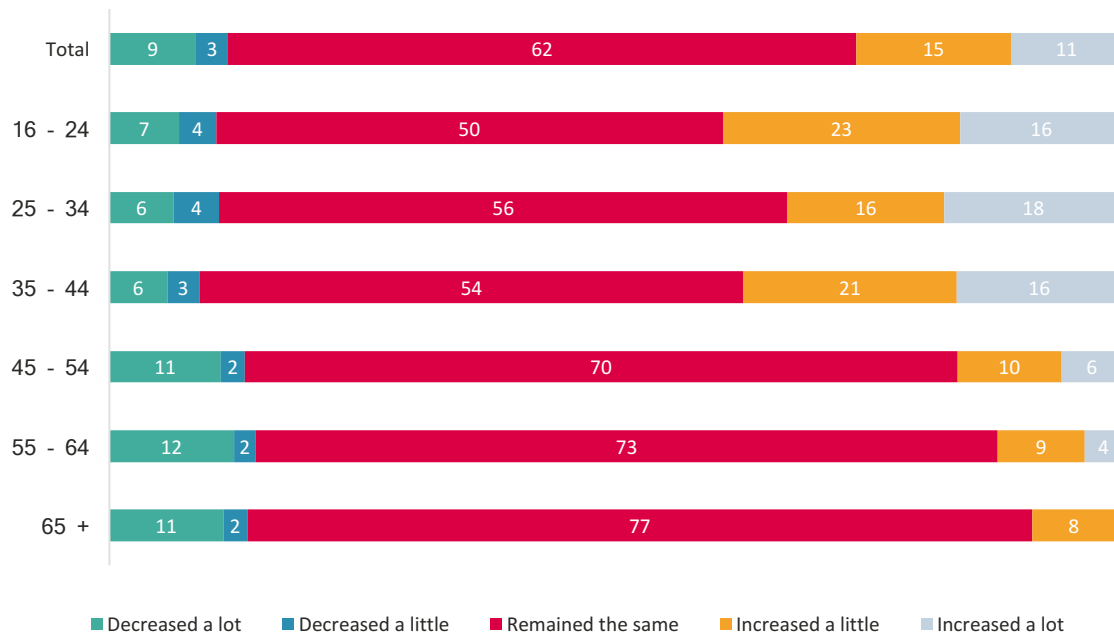
Questions:
And, in the last two years, would you say your interest in listening to music in a different language (i.e. not in your native language) has... Base: All who listen to music in a 'typical' day (n = 1,291)
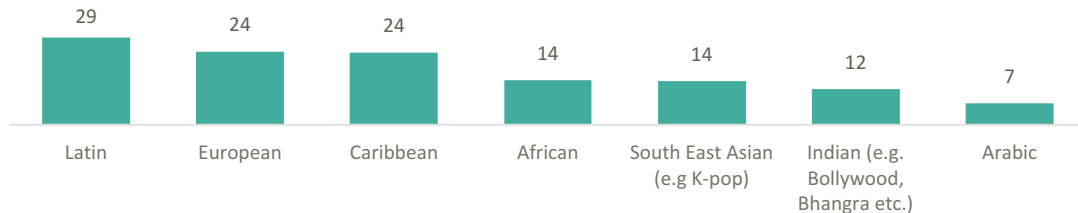
ORIGINS OF WORLD MUSIC

Specific types of world music are attracting the attention of at least a quarter of the US population.

Interest was **highest (approximately a quarter)** for music of Latin, European and Caribbean origins.
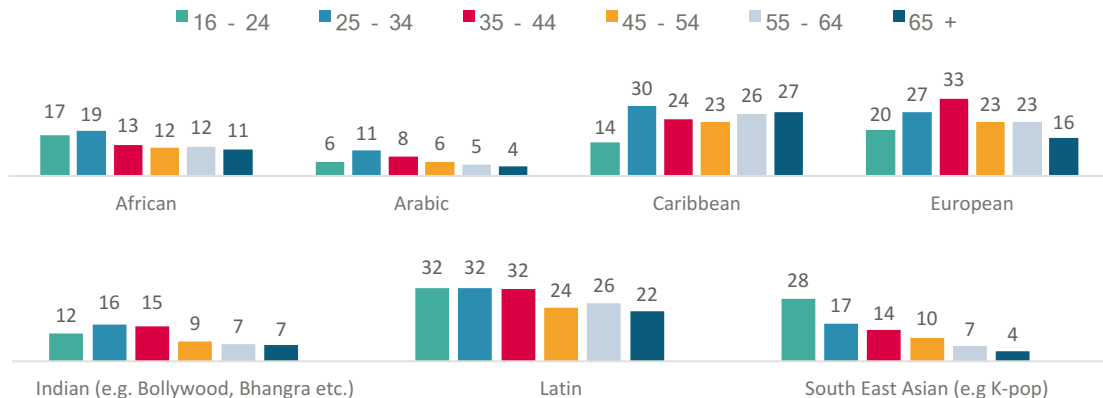
Around **1 in 10** displayed interest in others types.

Interestingly, while, at a total sample level, 14% were interested in **music from South East Asia**, this was double (28%) for the youngest age group (16-24 year olds).

INTEREST IN COUNTRY OF ORIGIN

Latin	29	
European	24	
Caribbean	24	
African	14	
South East Asian (e.g K-pop)	14	
Indian (e.g. Bollywood, Bhangra etc.)	12	
Arabic	7	

BY AGE

Legend: 16 - 24 | 25 - 34 | 35 - 44 | 45 - 54 | 55 - 64 | 65 +

African: 17, 19, 13, 12, 12, 11

Arabic: 6, 11, 8, 6, 5, 4

Caribbean: 14, 30, 24, 23, 26, 27

European: 20, 27, 33, 23, 23, 16

Indian (e.g. Bollywood, Bhangra etc.): 12, 16, 15, 9, 7, 7

Latin: 32, 32, 32, 24, 26, 22

South East Asian (e.g K-pop): 28, 17, 14, 10, 7, 4

Questions:
Which, if any, world music/sounds are you interested in?
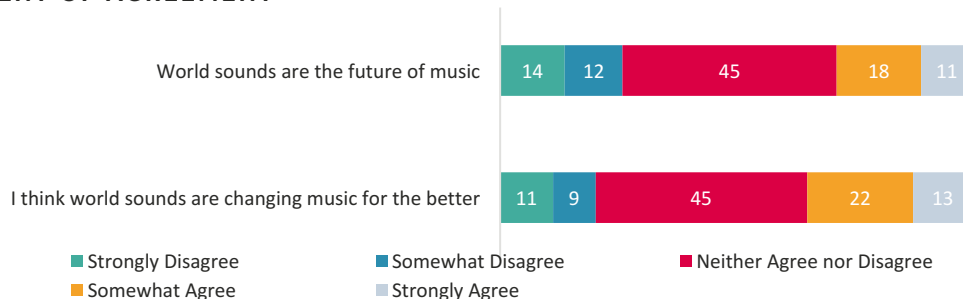Base: All who listen to music in a 'typical' day (n = 1,291)

BROAD ATTITUDES TOWARDS WORLD MUSIC

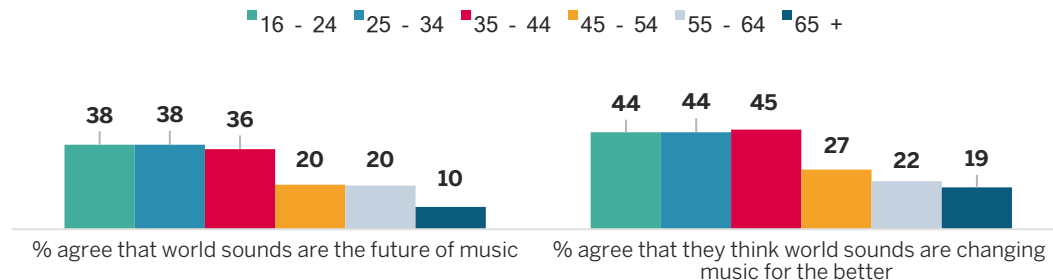World music is seen as bringing value to the industry.

There appears to be a strong **appreciation and respect** for world music's contribution to the industry:

- Over a third (35%) agreed that **world sounds are changing music for the better**, rising to almost half for those aged 16-44.

- More than a quarter (29%) agreed that **world sounds are the future of music**, rising by 7-9% for those aged 16-44.

EXTENT OF AGREEMENT

World sounds are the future of music	14 12 45 18 11	
I think world sounds are changing music for the better	11 9 45 22 13	

■ Strongly Disagree   ■ Somewhat Disagree   ■ Neither Agree nor Disagree
■ Somewhat Agree   ■ Strongly Agree

AGREEMENT BY AGE

■ 16 - 24   ■ 25 - 34   ■ 35 - 44   ■ 45 - 54   ■ 55 - 64   ■ 65 +

38 38 36 20 20 10

% agree that world sounds are the future of music

44 44 45 27 22 19

% agree that they think world sounds are changing music for the better

Questions:
To what extent do you agree/disagree with the following statements?
Base: All who listen to music in a typical day (n = 1,291)

FUTURE LISTENING INTENTIONS

Engagement with world music is likely to increase in coming years.

Time spent listening to world music is likely to increase in coming years:

- A third (33%) indicated that they are likely to **listen to more world music** in the next few years. This was notably higher among all aged 16-44 (between 41-47%).

- 31% indicated that they are likely to **listen to more music in non-native languages** in coming years. This was again higher for those aged 16-44 (between 42-44%).

EXTENT OF AGREEMENT

I'm likely to listen to more world music in the next few years

| 20 | 14 | 33 | 20 | 13 |

I'm likely to listen to more music in different languages in the next few years

| 26 | 14 | 29 | 18 | 13 |

- Strongly Disagree
- Somewhat Disagree
- Neither Agree nor Disagree
- Somewhat Agree
- Strongly Agree

AGREEMENT BY AGE

- 16 - 24
- 25 - 34
- 35 - 44
- 45 - 54
- 55 - 64
- 65 +

% agree that they're likely to listen to more world music in the next few years

41, 47, 42, 24, 19, 15

% agree that they're likely to listen to more music in different languages in the next few years

44, 42, 42, 19, 16, 12

Questions:
To what extent do you agree/disagree with the following statements?
Base: All who listen to music in a typical day (n = 1,291)

Section 8

Music & Mental Health

Managing Mental Health
A Day-to-Day Process

58%
Over half

feel stressed or anxious **on a weekly basis**

22%
One in five

feel stressed or anxious **daily**

25%
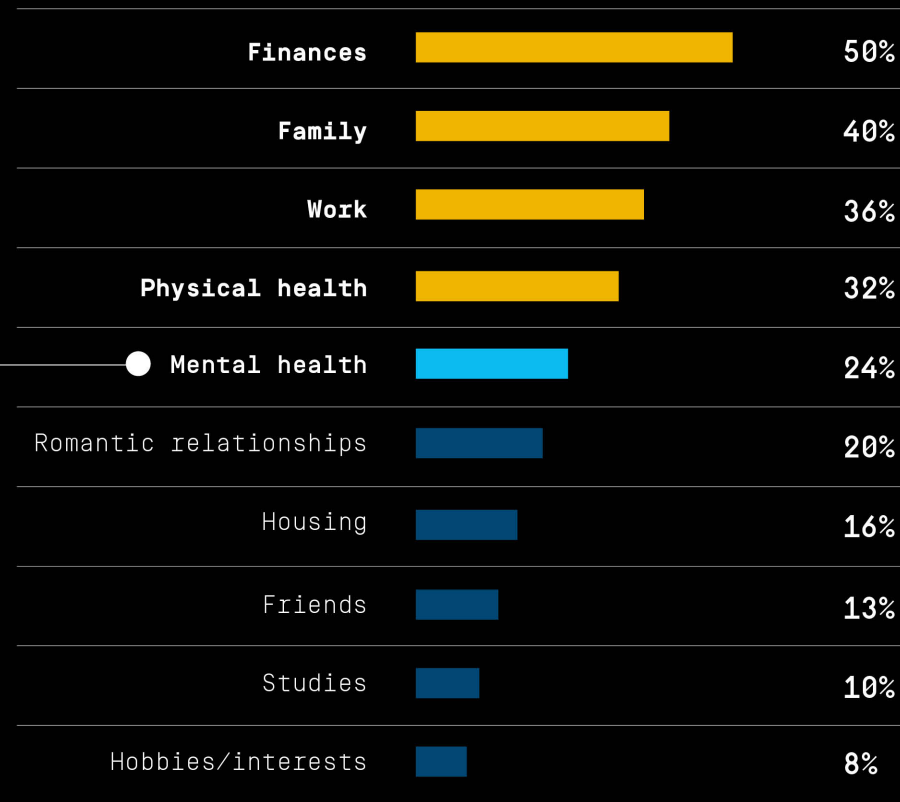**A quarter**

feel stressed or anxious **a few times a week**

Contributors to Stress & Anxiety

1 in 4 are stressed and/or anxious about mental health itself

Finances	50%
Family	40%
Work	36%
Physical health	32%
Mental health	24%
Romantic relationships	20%
Housing	16%
Friends	13%
Studies	10%
Hobbies/interests	8%

Managing Mental Health
Broad Strategies

Most people have strategies in place to help them manage stress and/or anxiety on a day-to-day basis:

Just 5% did not use one of the tools/techniques tested.

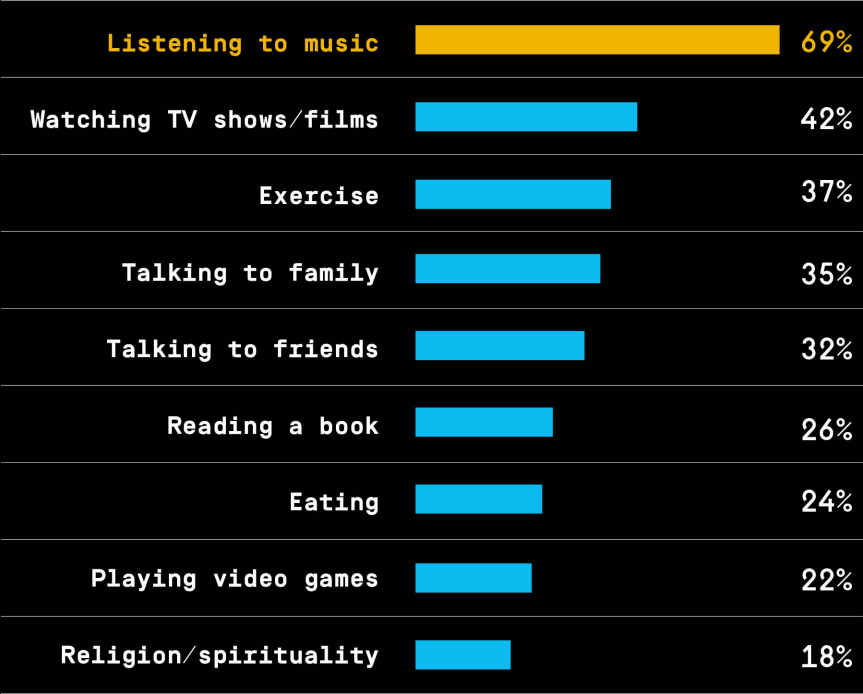**Approaches that facilitate escapism and the release of endorphins are amongst the most commonly used:**

Listening to music is the most relied upon tool/technique [69%]

Watching TV shows/films is the second most relied upon tool/technique [42%]

Over a third [37%] exercise

Managing Mental Health
Music as a Key Tool

Listening to music	69%
Watching TV shows/films	42%
Exercise	37%
Talking to family	35%
Talking to friends	32%
Reading a book	26%
Eating	24%
Playing video games	22%
Religion/spirituality	18%

Shopping	17%
Taking a break	17%
Going on social media	16%
Going out	16%
Yoga/meditation	12%
Talking to a therapist	9%
Listening to podcasts	8%
Dancing	6%
Talking to a doctor	5%

Managing Mental Health
Top Strategies

When asked to pick their Top 3, the role of music becomes even more apparent:

51%
Over half
selected music
in their Top 3

25%
One in four
selected music
as their Top 1

Mood Enhancement

> "Music helps to lift my mood when I am feeling down"

90%
Agreed

48%
Strongly agreed

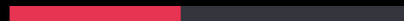"Listening to music helps me escape and forget my stresses and problems"

Escape

84%
Agreed

43%
Strongly agreed

Resilience

> "I feel more motivated after listening to music"

79%
Agreed

37%
Strongly agreed

> "Without music I would feel more stressed and/or anxious"

74%
Agreed

36%
Strongly agreed

Confidence

"After listening to music, I feel better about my ability to manage my stresses and anxieties"

76%
Agreed

31%
Strongly agreed

"Music makes me feel better about myself/more confident"

69%
Agreed

29%
Strongly agreed

Empathy

> "Music inspires me through hearing other people's stories"

57%
Agreed

25%
Strongly agreed

> "Music gives me courage"

57%
Agreed

23%
Strongly agreed

How Music is Used

Listeners gravitate towards their favourite songs and/or artists over more generic music [e.g. inspirational songs, upbeat tracks etc.]

	% A Lot
A few of your favorite songs	58%
Your favorite artists	55%
Your own playlists	45%
Your favorite albums	40%
Upbeat/fun tracks	31%
Inspirational songs	26%
Slow songs	16%
Playlists created by platforms	16%
Something new	13%
Other	10%

Key Learnings

01

Managing stress and anxiety is a **day-to-day process** for most

02

Tools/techniques are used to help manage and reduce stress and anxiety

03

Management strategies seem to be centered around **distraction** and **boosting morale** [e.g. through endorphins, mood uplift etc.]

04

Music most commonly used method to manage and reduce stress and anxiety

THANK YOU

For any questions about this report please contact our Head of Research:

sania@audiencenet.co.uk