

Music Genres:

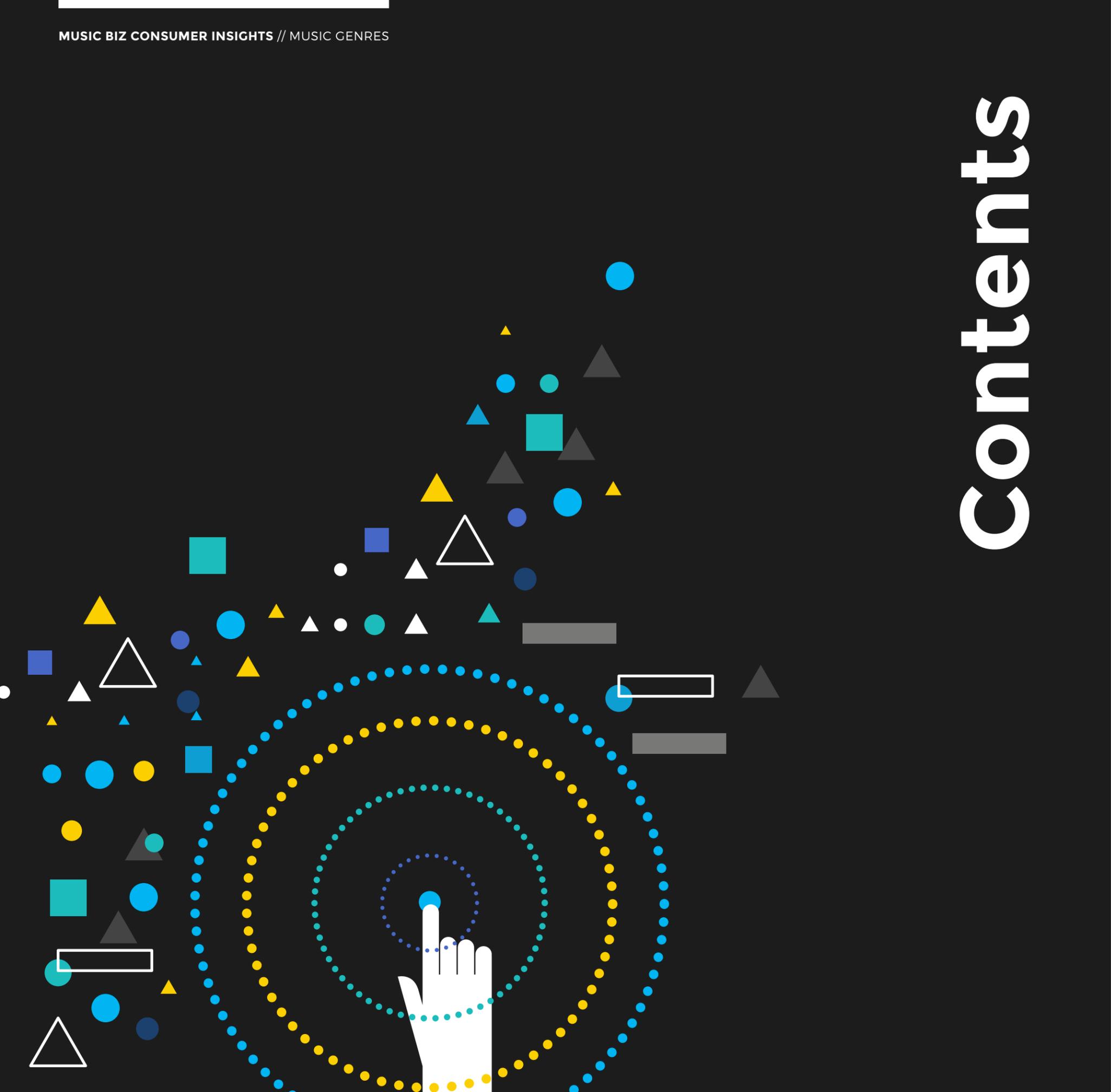
How different fans
consume music

August 2016



Contents

- 4** [Music Genres: How Different Fans Consume Music](#)
- 6** [Fan Personas](#)
- 8** **Section 1:** [Sample](#)
- 10** **Section 2:** [Topline Data: Genres Liked](#)
- 20** **Section 3:** [Music Consumption](#)
- 26** **Section 4:** [Music Discovery & Spending](#)
- 38** **Section 5:** [Social Media Usage](#)
- 42** **Section 6:** [Brand Advocacy](#)



MUSIC GENRES: HOW DIFFERENT FANS CONSUME MUSIC

Many music consumers today, particularly younger generations, are genre agnostic. With better access to a wider range of music than ever before, they aren't limited to what they want to listen to. Social identity (i.e. being a Punk, Goth etc.) is becoming less restrictive musically.

For example, today, a punk only listening to punk music and nothing else is becoming increasingly less common. 'Being cool' these days is more about finding the latest, greatest and most interesting music, no matter the genre or era, and sharing it with friends, before they can share it with you.

As consumers are harder to group by genre, profiling music fans, and creating reliable actionable insights that inform advertising imagery and messaging becomes difficult - how do you identify and market to an audience with such diverse tastes and interests?

This report first identifies different music fans and then measures their behavior in relation to music listening, spending and discovery - helping to build a bigger and more detailed picture of how different fans consume music.



PERSONAS

Our data revealed the following archetypes for five core musical genres



MARY-ANN
COUNTRY FAN

GENDER Female

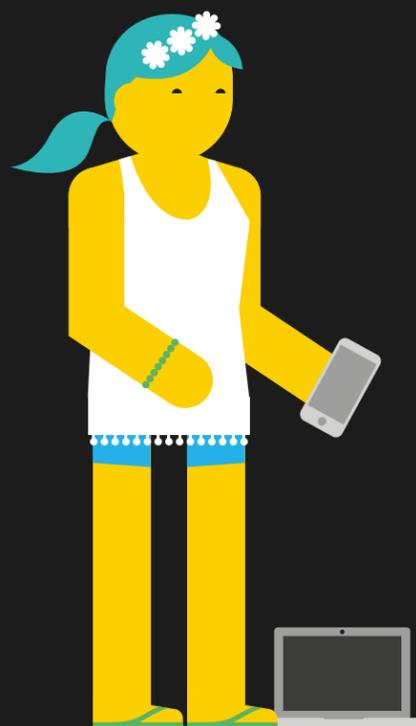
AGE 45+

LISTENS TO FM/AM Radio

LISTENS ON FM/AM Receiver

SOCIAL PLATFORM Facebook

ADVOCATES Wal-mart
Walt Disney
Chevrolet



JESSICA
POP FAN

Female

15-44

On-demand streaming/Downloads

Laptops

Facebook & Twitter

Target
Apple
Amazon



BRAD
DANCE FAN

Male

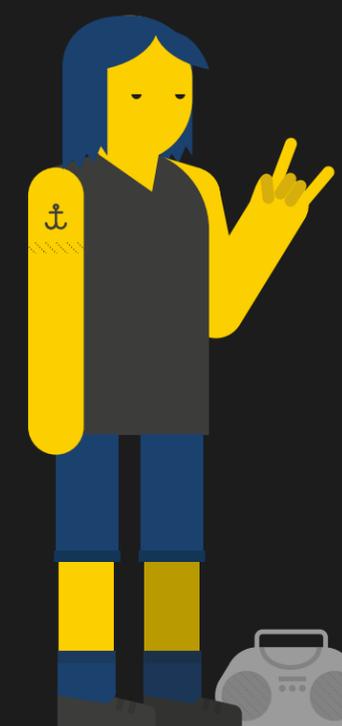
15-34

Spotify & YouTube

Desktop & Smartphones

Snapchat, YouTube & Instagram

Microsoft
Sony
Playstation



OZZY
ROCK FAN

Male

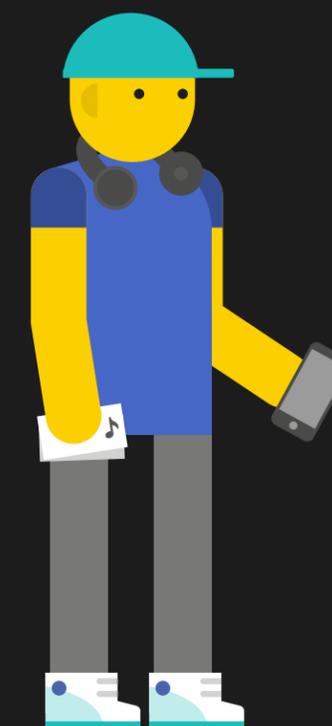
35+

CDs

CD Players, standalone & in-car

Facebook & YouTube

Samsung
Rolling Stone
Coca-Cola



CAMERON
HIP-HOP FAN

Male

15-34

Spotify & Pandora

Smartphones

Instagram & YouTube

Google
Nike
Adidas



SECTION 1:

Sample

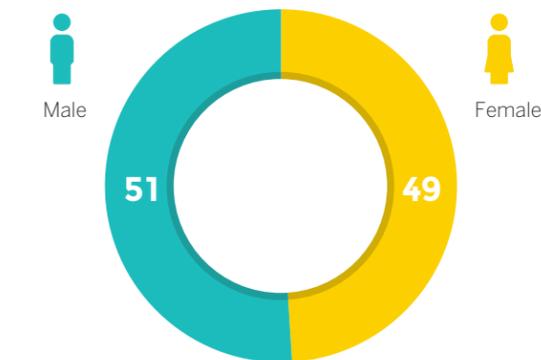
SAMPLE

3014 Respondents

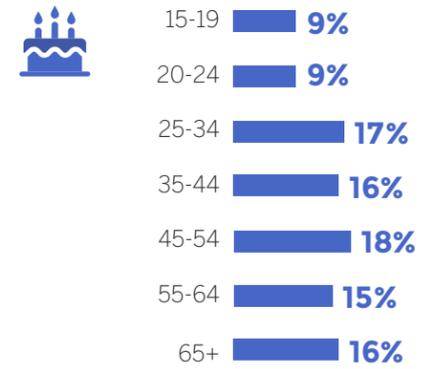
A statistically and demographically representative sample of the US population.

All respondents had online access.

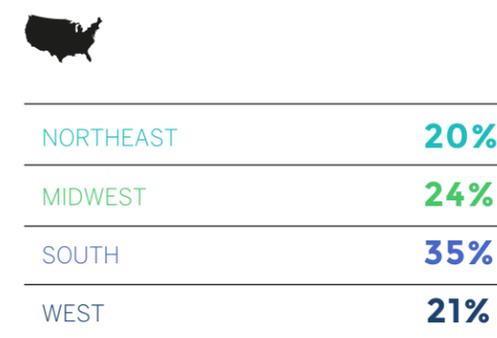
GENDER



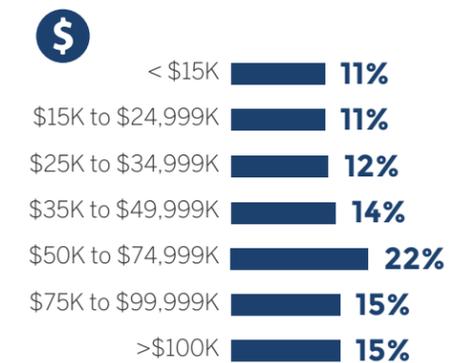
AGE



REGION



INCOME





SECTION 2:

Topline Data: Genres Liked

CLASSIC ROCK LEADS THE PACK

Total Sample



Out of all the genres tested,
Classic Rock was the most popular at 45%.



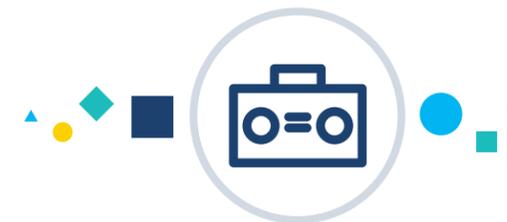
Classic 80s/90s and Rock music
followed, both at 40%.



Pop music came 4th at 36%



Country and Western came 6th at 30%.



Hip-Hop sat in 8th place at 22%

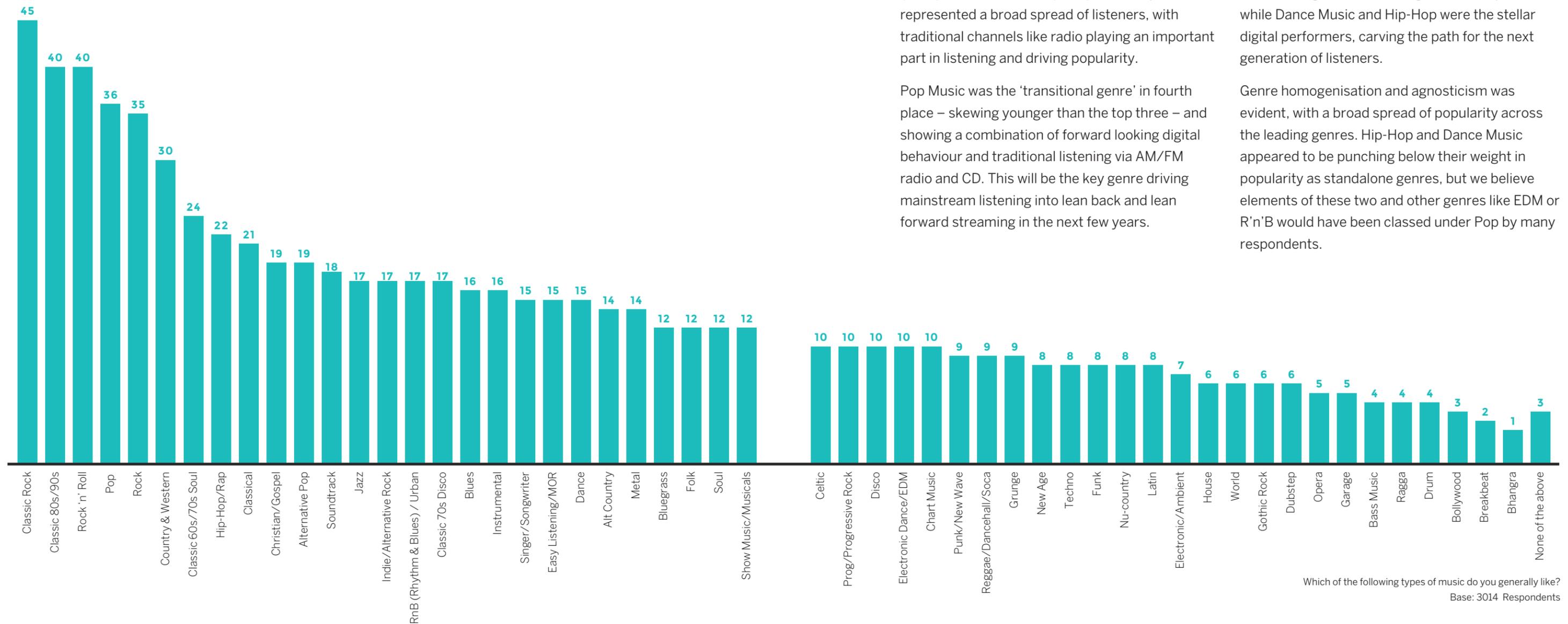


Classical music came 9th at 21%

Which of the following types of music do you generally like?
Base: 3014 Respondents

CLASSIC ROCK LEADS THE PACK

FAVORITE GENRES (%)



Six genres led the survey while three stood out with 40% or more listeners citing them as preferred genres – Classic Rock (45%), Classic 80s/90s (40%) and Rock 'n' Roll (40%). These top three represented a broad spread of listeners, with traditional channels like radio playing an important part in listening and driving popularity.

Pop Music was the 'transitional genre' in fourth place – skewing younger than the top three – and showing a combination of forward looking digital behaviour and traditional listening via AM/FM radio and CD. This will be the key genre driving mainstream listening into lean back and lean forward streaming in the next few years.

Country & Western in sixth place represents an opportunity, albeit a difficult one, to move casual listeners with potential high value over to streaming services and digital consumption, while Dance Music and Hip-Hop were the stellar digital performers, carving the path for the next generation of listeners.

Genre homogenisation and agnosticism was evident, with a broad spread of popularity across the leading genres. Hip-Hop and Dance Music appeared to be punching below their weight in popularity as standalone genres, but we believe elements of these two and other genres like EDM or R'n'B would have been classed under Pop by many respondents.

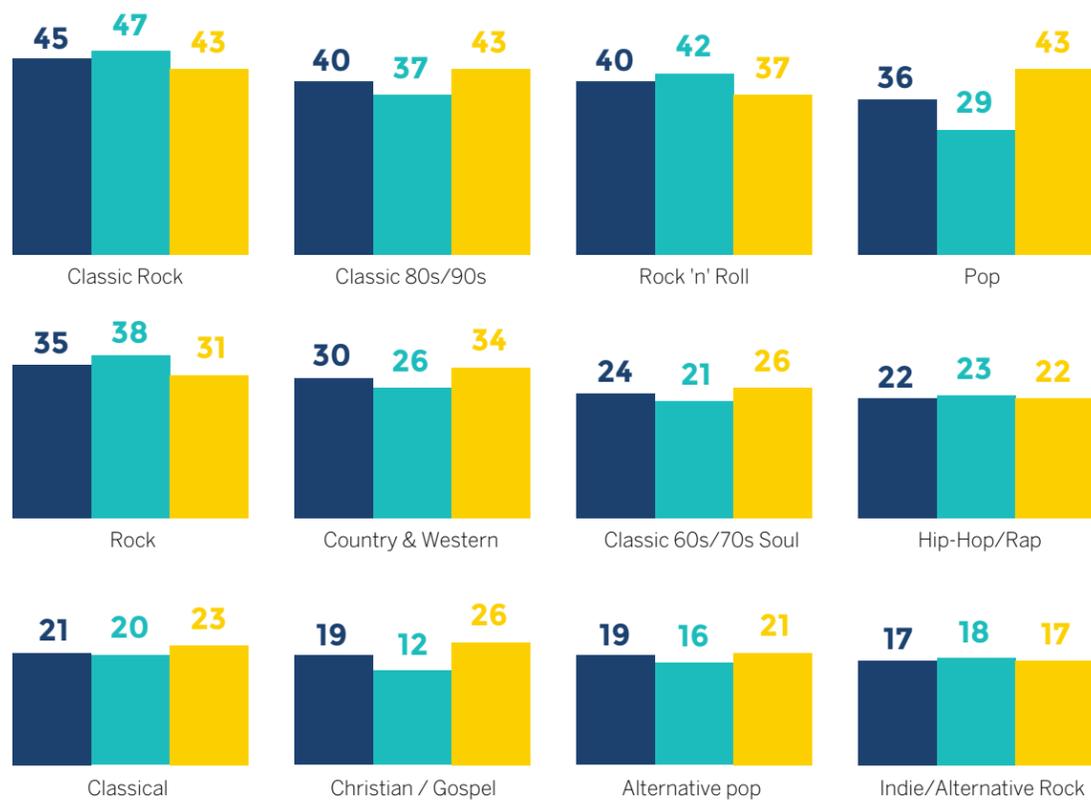
MALES LIKE ROCK, FEMALES LIKE POP

Total sample

Out of the top genres, Females were more likely to say that they enjoy Pop, Classic 80s/90s and Country & Western, Classical, Christian Gospel and Alternative pop.

Males were more likely to select Rock, Classic Rock, and Rock'n'Roll,

GENRES BY GENDER (%)



● TOTAL ● MALE ● FEMALE

Which of the following types of music do you generally like?
Base: 3014 Respondents

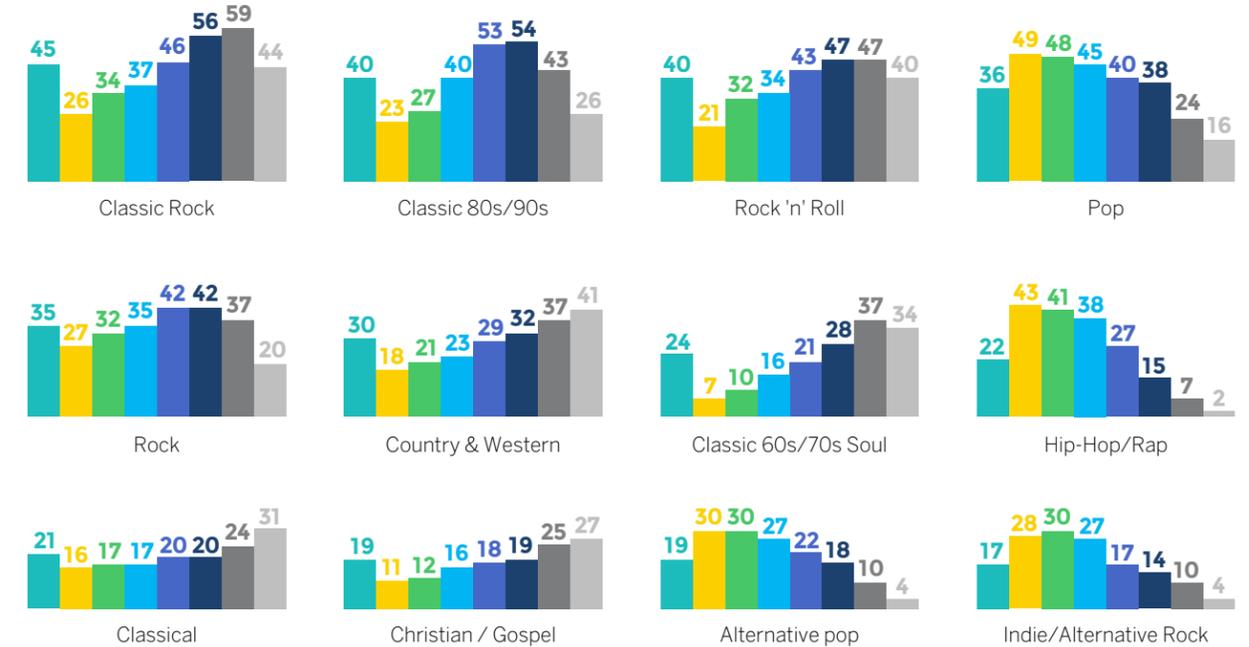
OLDER FANS PREFER ROCK, COUNTRY AND SOUL

Total sample

Older age groups preferred, and over-indexed on, Classic Rock, Classic 80s/90s, Rock 'n' Roll, Country & Western, and Classic 60s/70s Soul.

Younger generations, meanwhile, under-indexed on liking genres preferred by older generations (see above), instead opting to listen to: Pop music, Hip-Hop/Rap, Alternative pop and Indie/Alternative Rock.

GENRES BY AGE (%)



● TOTAL ● 15-19 ● 20-24 ● 25-34 ● 35-44 ● 45-54 ● 55-64 ● 65+

Which of the following types of music do you generally like?
Base: 3014 Respondents

GENRE DEFINITIONS

For the rest of the report, we have aggregated our extensive genre list into 5 main categories: Pop, Dance, Rock, Hip-Hop and Country, for the purpose of comparison.

They are defined by and include the following:



COUNTRY NET

Country, Country & Western, AltCountry, Nu Country and Bluegrass



POP NET

Pop music, Alternative Pop and Chart Music



DANCE NET

Electronic Dance EDM, Electronic/Ambient, House, Techno, Drum'n'Bass, Dubstep, Bass Music, Breakbeat and Garage



ROCK NET

Classic rock, Rock, Indie/Alternative Rock, Prog/Progressive Rock, Gothic Rock, Metal, Grunge and Punk/New Wave



HIP-HOP NET

Hip-Hop/Rap and RnB (Rhythm & Blues) /Urban

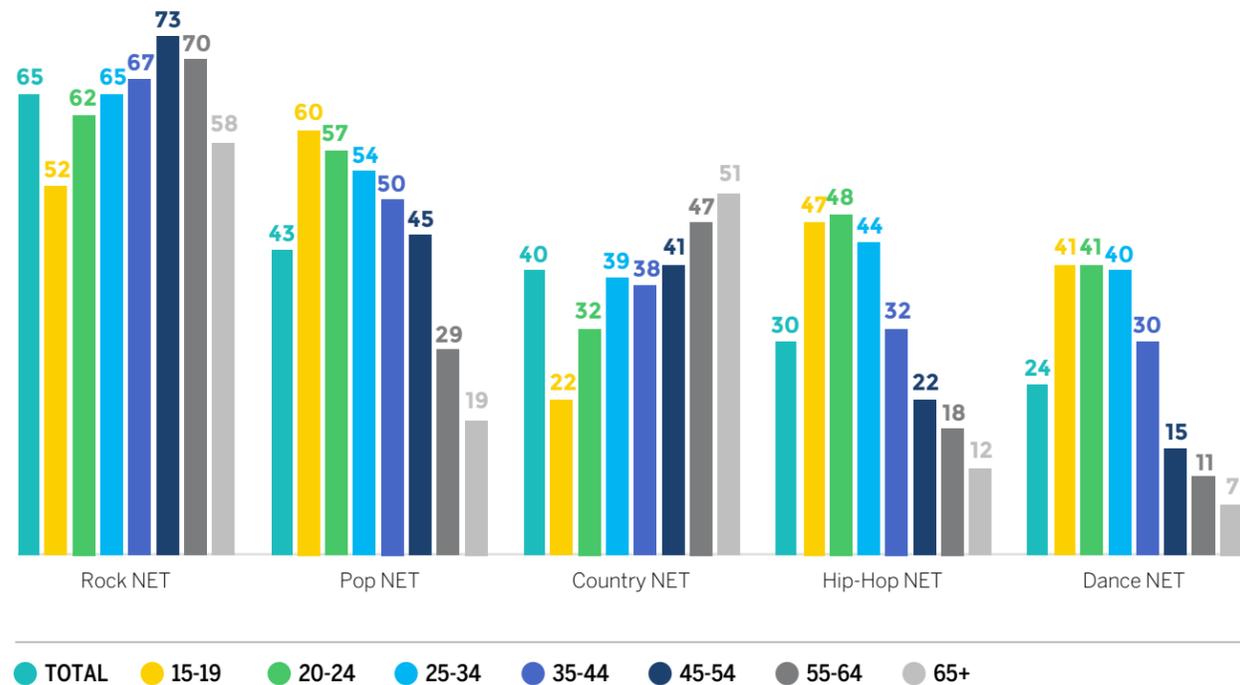


ROCK & COUNTRY SKEW OLD; POP, DANCE & HIP-HOP SKEW YOUNG

Total Sample

Looking at the genre categories, Rock and Country were popular amongst the older age groups. By contrast, younger age groups under-indexed on Rock and Country, instead opting for Hip-Hop, Dance and Pop.

GENRES LIKED BY AGE (%)

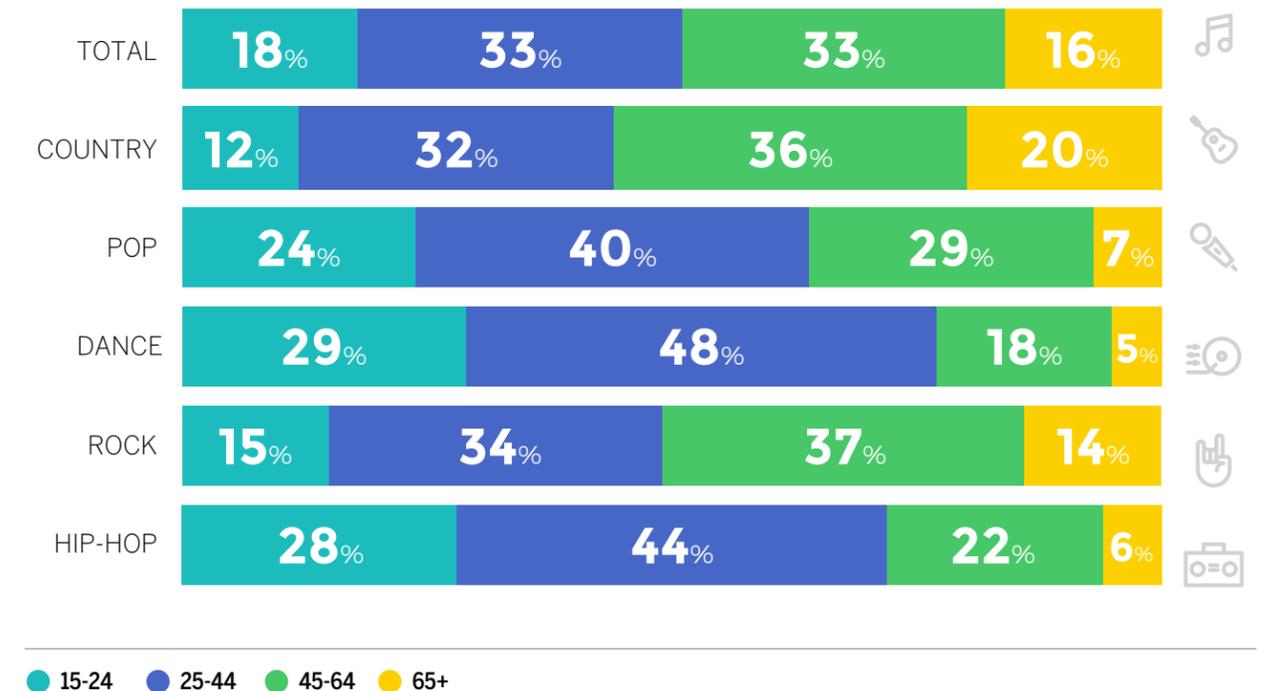


Which of the following music do you generally like?
Age breakdown of: 1217 Country fans, 1299 Pop fans, 734 Dance fans, 1987 Rock fans and 892 Hip-Hop fans

Total Sample

Breaking down the fans of each genre by age, it is evident that Country fans were mainly older respondents (56% were 45+), whilst Pop, Dance and Hip-Hop fans were mostly younger respondents.

AGE BREAKDOWN BY GENRE NETS (%)



Which of the following music do you generally like?
Age breakdown of: 1217 Country fans, 1299 Pop fans, 734 Dance fans, 1987 Rock fans and 892 Hip-Hop fans



SECTION 3:

Music Consumption

HIP-HOP & DANCE FANS ARE EAGER DIGITAL LISTENERS

Despite being less popular overall than the genre pack leaders, Hip-Hop and Dance Music punched above their weight in digital music usage.

These fans are the signpost for the streaming generation and sit in two of the most lucrative and exciting genres from a musical and technical perspective in the industry.

By 2004 Forbes already had the Hip-Hop industry pegged at a value of \$10bn dollars and Hip-Hop entrepreneurs like Jay-Z and Dr. Dre have built empires that encompass technology, lifestyle brands and now streaming music – Dr Dre's Beats Music was the foundation for Apple Music and Jay-Z's Tidal is the subject of acquisition rumours by Apple.

Even Snoop Dogg is hailed as one of the most eager music marketing innovators, between his various businesses and apps including the Snoopify sticker/photo app. Fans are accordingly progressive.

Dance Music has also burgeoned in the last few years creating mega stars like David Guetta, Calvin Harris and Tiesto and is now a sector worth \$7.1bn, as well as one of the highest grossing live genres in the US.

Correspondingly, Hip-Hop and Dance Music fans are eager digital listeners. They were the leading genres in terms of listener minutes per day – Hip-Hop listeners clocked an average of 185 minutes and Dance Music listeners clocked 200 minutes. Within this, Hip-Hop fans listened to music via streaming services much more than average (31% vs. 24%), just behind Dance Music listeners who listened the most via streaming services (34%). Hip-Hop and Dance Music fans listened to music on CD and traditional radio less than average.



Hip-Hop fans spent **27%** of their music listening time on a smartphone – the most time by far of all the genres (27% vs. 18% mean)

Hip-Hop fans spent the most time by far listening to music on a smartphone (27% vs. 18% mean), and listened to internet radio the most frequently (46%) alongside Dance Music (also 46%) and just ahead of Pop fans (45%).

Hip-Hop and Dance Music fans led music listening on YouTube (60% and 59% vs. 42% mean) and Spotify (28% and 30% vs. 19% mean) and were just behind Pop fans in iTunes usage (26% for Pop fans and 25% for Dance Music and Hip-Hop fans vs. 18% mean).

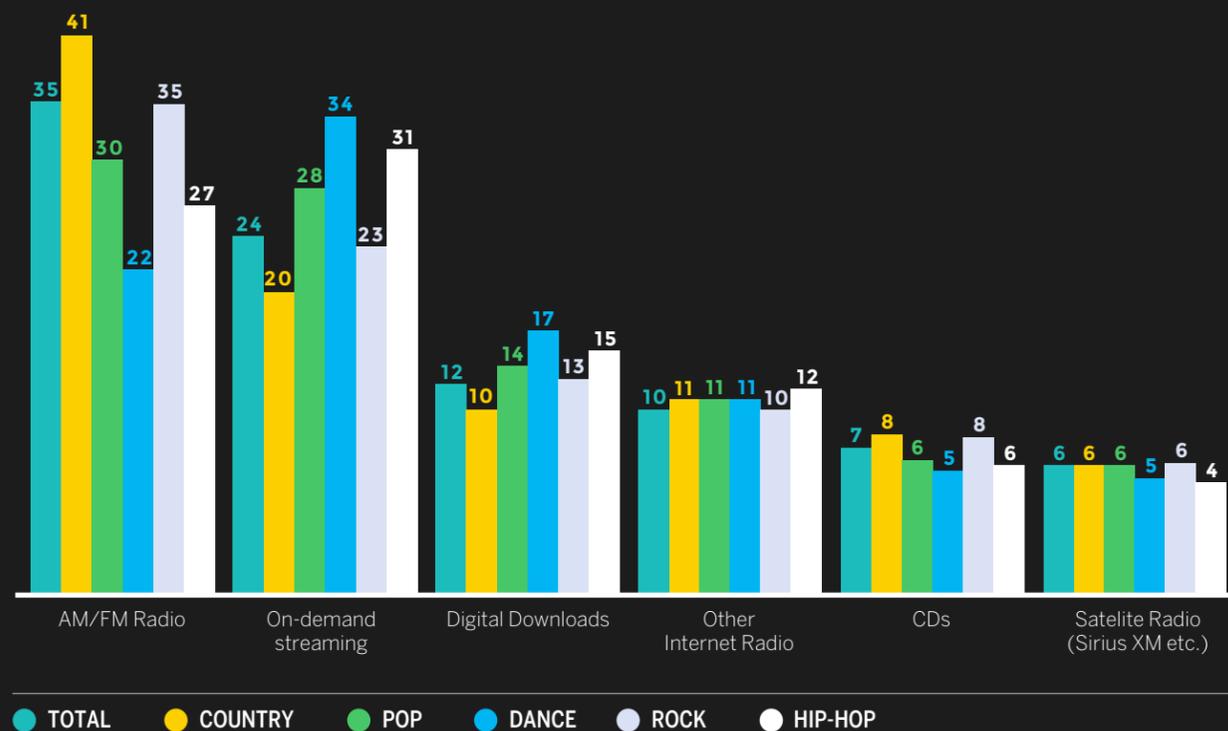
They were also more likely to use Apple Music (15% Dance fans vs. 9% mean with Hip-Hop fans at 13%). Access to key Hip-Hop exclusives could therefore be one of the driving reasons behind Apple's flirtation with buying Tidal, which has secured exclusives from Hip-Hop and RnB stars including Beyoncé, Jay-Z and Kanye West.

Dance Music fans listened the most on desktop (11% versus 8%) and on games consoles (6% versus 4% mean on Playstation). This underlines the potential value in marketing Dance Music artists to user bases of gaming video platforms like Twitch, which artists from Steve Aoki to Deadmau5 and the Prodigy have already done.

Dance Music fans bought the most tickets to live music events (28% having bought a ticket in the last six months vs. the 19% mean), while Pop and Hip-Hop fans followed closely in second with a strong 24%.

As a bonus, and as evidenced by the unique standalone success of the Beatport download store, Dance Music was the top genre group in those who pay for MP3/Download albums - 30% compared to the 16% mean). Dance Music fans were also more likely to listen to vinyl albums and singles (13% vs. 7% for vinyl albums and 8% vs. 3% for vinyl singles).

SHARE OF LISTENING BY GENRE



Question: To the nearest 15 minutes, how is your music listening time normally split between the following sources?

Share of listening

Hip-Hop and Dance fans over-indexed on time spent listening to on demand streaming services.

Online platforms accounted for 34% of Dance fan's listening time, and 31% of Hip-Hop fans' listening time, whilst the national average was 24%. Country fans meanwhile under-indexed at 20%.

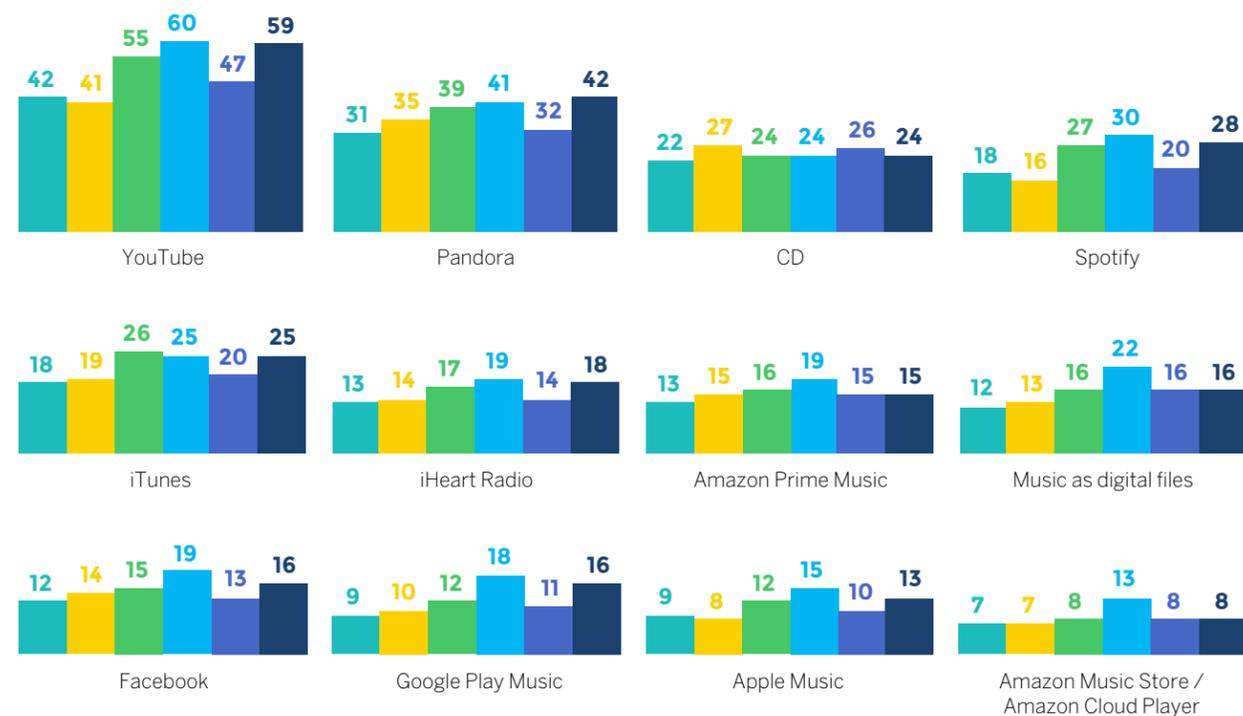
This higher uptake of online services has come at the expense of AM/FM Radio - whilst the format accounted for 35% of the general population listening time, it took a share of just 22% of Dance fans total listening time, and 27% of Hip-Hop fan listening time. Country fans meanwhile over-indexed on radio listenership at 41%.

HIP-HOP & DANCE FANS ARE DIGITAL LISTENERS

US Weekly Reach

Reflective of their preference for online streaming, Hip-Hop, Pop and Dance fans over-indexed on usage of digital platforms, particularly: YouTube, Pandora, Spotify, Google Play Music, iTunes and Apple Music.

PLATFORM REACH BY GENRE



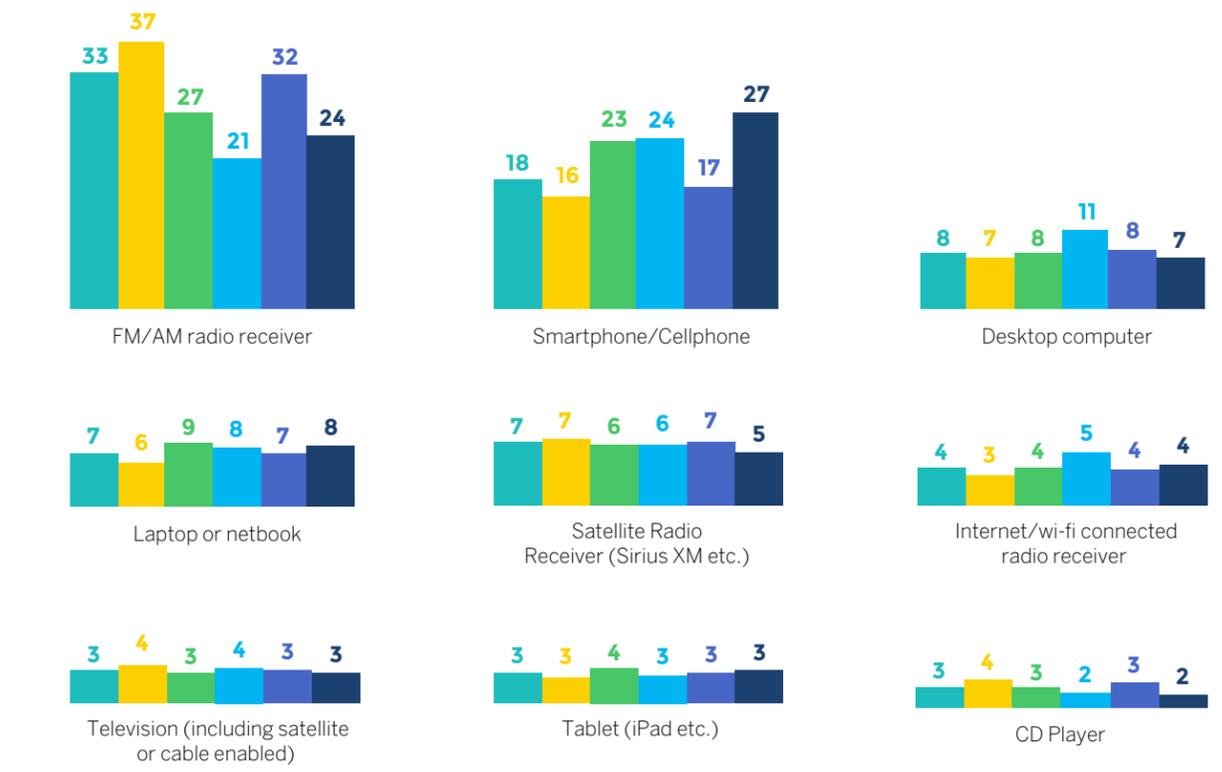
● TOTAL ● COUNTRY ● POP ● DANCE ● ROCK ● HIP-HOP

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: 3014 Respondents

All those who listen to music on a 'typical' day

Hip-Hop, Pop and Dance fans dedicated most of their listening time to Smartphone/Cellphones - the device accounted for 24% of Dance fans' listening time and 25% of Hip-Hop fans' listening time - whilst the national average was 18%. Country fans over-indexed on listening to the FM/AM Radio receiver, dedicating 37% of their total listening time to the device (compared to the 33% national average). Simultaneously, Hip-Hop and Dance fans under-indexed on listening to the same device.

DEVICE SHARE OF LISTENING AGE BY GENRE



● TOTAL ● COUNTRY ● POP ● DANCE ● ROCK ● HIP-HOP

To the nearest 15 minutes, how is your music split between the following devices?
Base: 2808 Respondents



SECTION 4:

Music Discovery & Spending

COUNTRY & WESTERN WAS THE MAINSTAY OF CASUAL LISTENING & SPEND

Country & Western was the sixth most popular genre (30%) in the survey and its listeners look like the mainstay of casual listening and spend.

There were two key issues in this genre: 1) genre/fan homogenisation; and 2) the challenge/need to convert Country and Western listeners to on demand streaming.

Homogenisation: the fact that Country & Western lies 6th suggests genre homogenisation and interference from pop and other categories, seeing as Country has been hailed as one of the fastest growing and most popular genres in the US in recent years, even top in 2012 according to NPD group.

Stars like Luke Bryan or an early Taylor Swift could easily be placed in the Pop category instead of Country and there is a degree of experimentation with digital marketing that crosses over pop with country, for example Luke Bryan's Smule duet with Jason Derulo. As a result many active country music fans may be described more appropriately by the pop category than the country category.

The streaming challenge: Country Music listeners in the survey represented a casual 'old school' segment who under-indexed on traditional listening and spend. They listened the least on a daily basis (145 minutes vs. the 147 minute mean) but listened the most on AM/FM Radio (41 minutes vs. the 35 minute mean) – not surprising considering that Country is the most widespread music format in radio stations across the US. They listened the most on CDs too (8.4 minutes versus 7.2 minute mean).



Their streaming behaviour was lower than the survey average – they spent the lowest time streaming on demand (20 minutes vs. the 31 minute mean) – and was biased towards lean back internet radio; they were more likely to use Pandora (35% vs. the 31%) mean but less likely to use YouTube or Spotify. They were the least likely to have had a premium/paid subscription to a streaming service (24%). There is a clear challenge

here for on demand streaming services to attract new Country Music fans to their service funnels on free trials or freemium tiers and upsell them to paid-for tiers.

This presents an issue for the industry, as these listeners represent a high value segment: a 2015 MRI Gfk survey revealed that Country Music listeners over-indexed on key psychographic qualities ranging from marriage to house ownership, college education, full time employment and average household income.

So it's a lucrative sector for on demand streaming services in the US to unlock and they will have to work hard to educate and activate these Country Music fans.

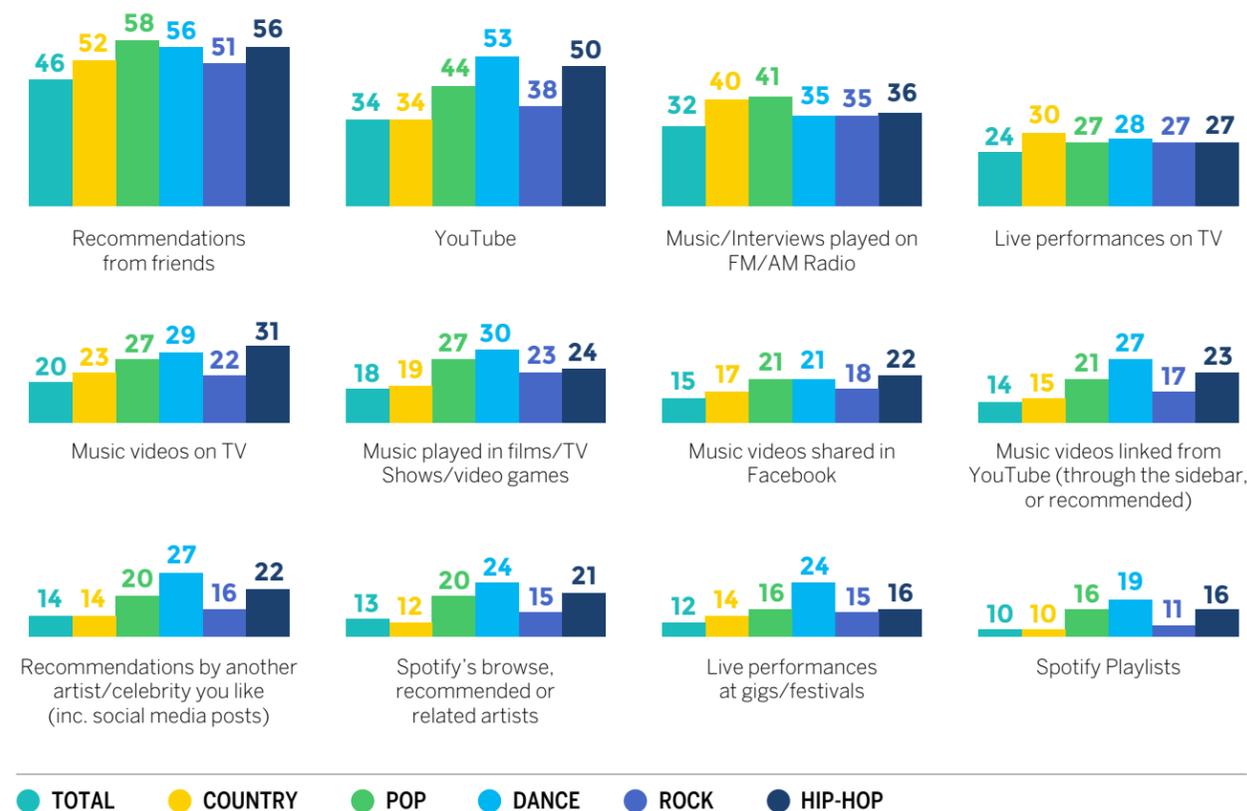
On the plus side, Country Music listeners were the least likely to pirate music.

POP FANS DISCOVER MUSIC THROUGH YOUTUBE & RADIO

Total Sample

All genre categories over-indexed on most methods of discovery. Pop, Dance and Hip-Hop fans particularly over-indexed on music discovery through YouTube, music videos on TV, music played in films/TV shows/video games, music suggested through YouTube and Spotify, and recommendations by an artist/celebrity. Meanwhile, Country fans over-indexed on discovery through Live performances on TV.

TOP MEANS OF DISCOVERY BY GENRE NET (%)



How do you typically discover music?
Base: 3014 Respondents

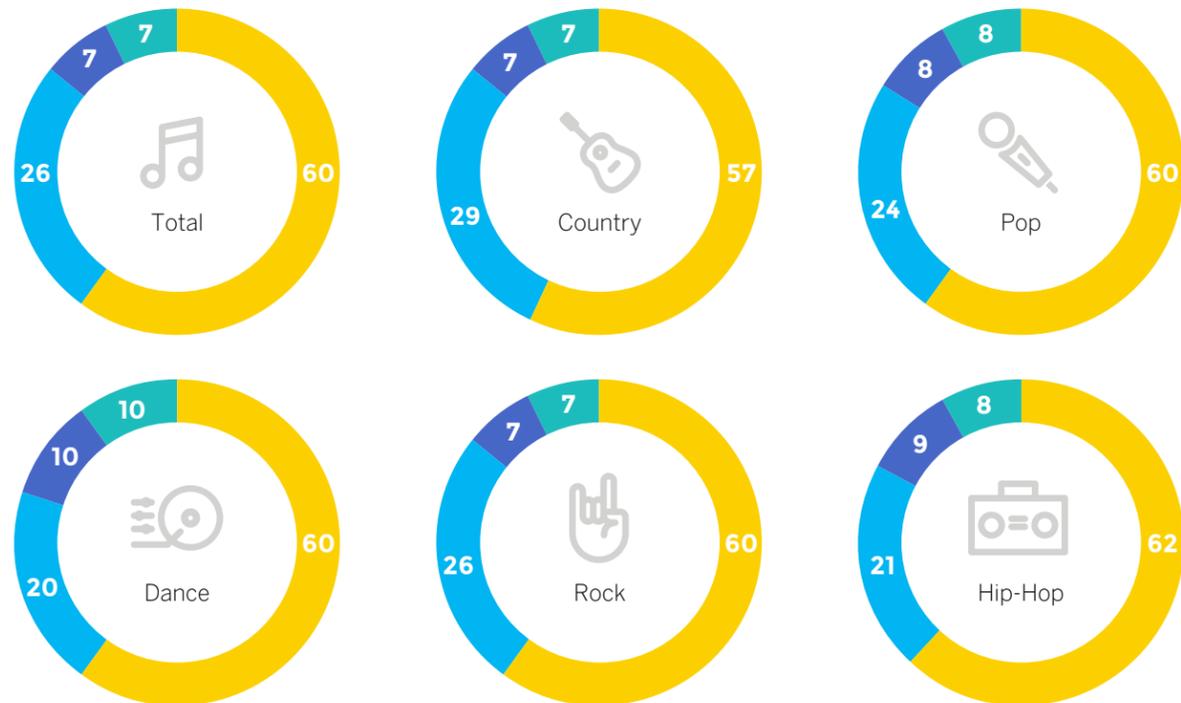
COUNTRY & ROCK FANS ARE THE MOST LEAN BACK LISTENERS

Total Sample

Self-selected music remained similar across the genre categories. Reflective of their preference for radio, Country and Rock music fans over-indexed on 'music selected by someone else on radio'.

Dance Music fans, meanwhile, over-indexed on 'music selected by someone else on a music service' and 'music selected by a computer program / algorithm' – indicative of their preference to listening to online sources.

SELF-SELECTED VS. CURATED, LEAN BACK LISTENING



- I WOULD DEFINITELY BE PREPARED TO PAY A PREMIUM
- I WOULD CONSIDER PAYING A PREMIUM
- I WOULD BE FAIRLY UNLIKELY TO PAY A PREMIUM
- I DEFINITELY WOULD NOT PAY A PREMIUM

Base: 3014 Respondents

POP & HIP-HOP FANS ARE PLAYLIST LISTENERS

Total Sample

Listening to singles remained similar across the different genre fans. Pop and Hip-Hop fans under-indexed on listening to albums, whilst over-indexing on listening to playlists.

SINGLES, ALBUMS OR PLAYLISTS?

	Singles	Albums	Playlists
TOTAL	47%	22%	31%
COUNTRY	46%	22%	32%
POP	47%	18%	35%
DANCE	47%	22%	31%
ROCK	48%	22%	30%
HIP-HOP	47%	18%	35%

How is your music listening split between the following?
Base: 3014 Respondents

DANCE AND HIP-HOP FANS ARE BIG SPENDERS

Total Sample

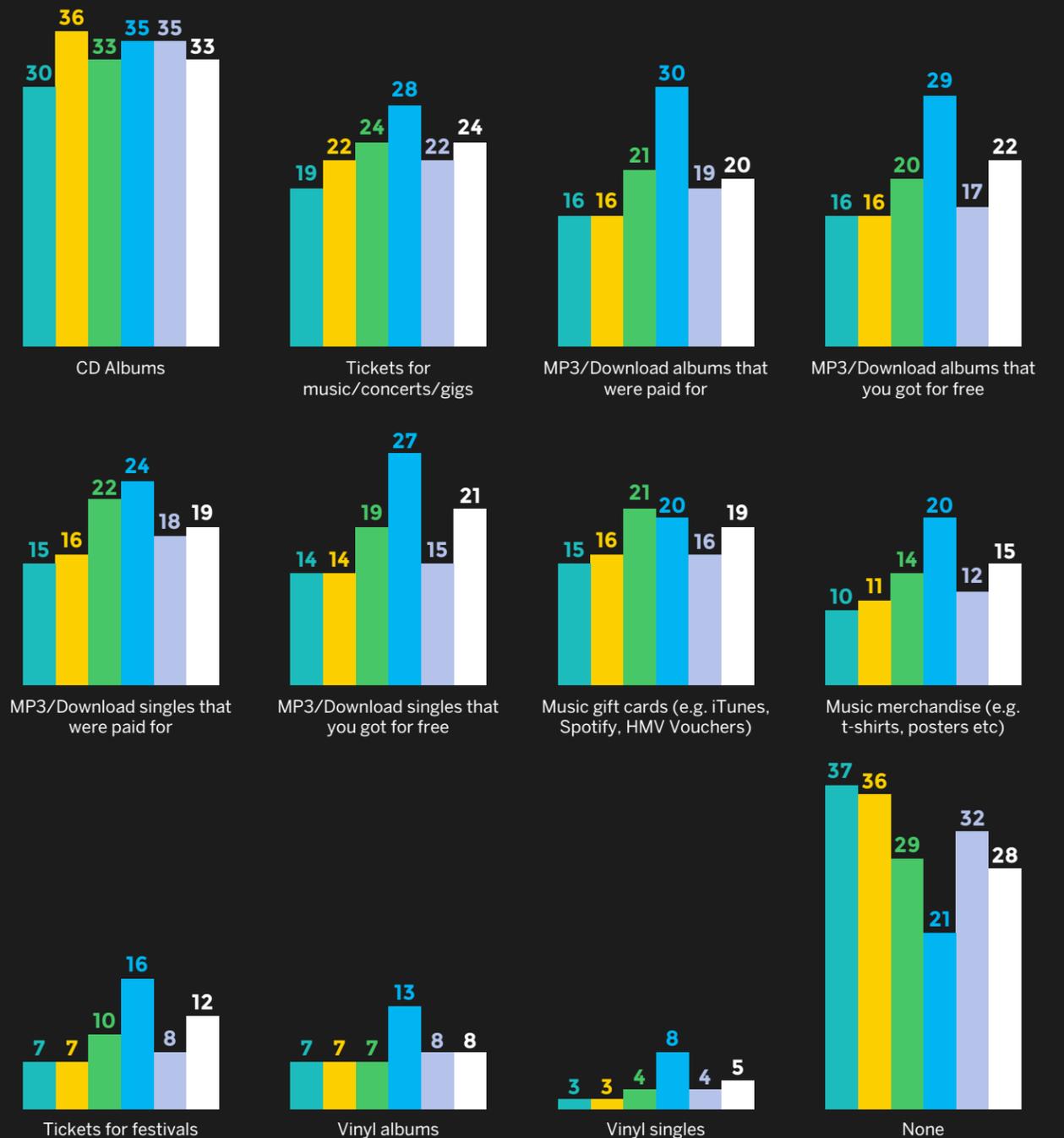
All of the genre categories over-indexed on spending on most music related products.



Dance and Hip-Hop fans bought the most music related products

Dance fans and Hip-Hop fans bought the most music related products - whilst 63% of the total sample had purchased a music related product over the past 6 months, 79% of Dance fans and 72% of Hip-Hop fans did the same.

MUSIC SPENDING BY GENRE (%)



● TOTAL ● COUNTRY ● POP ● DANCE ● ROCK ● HIP-HOP

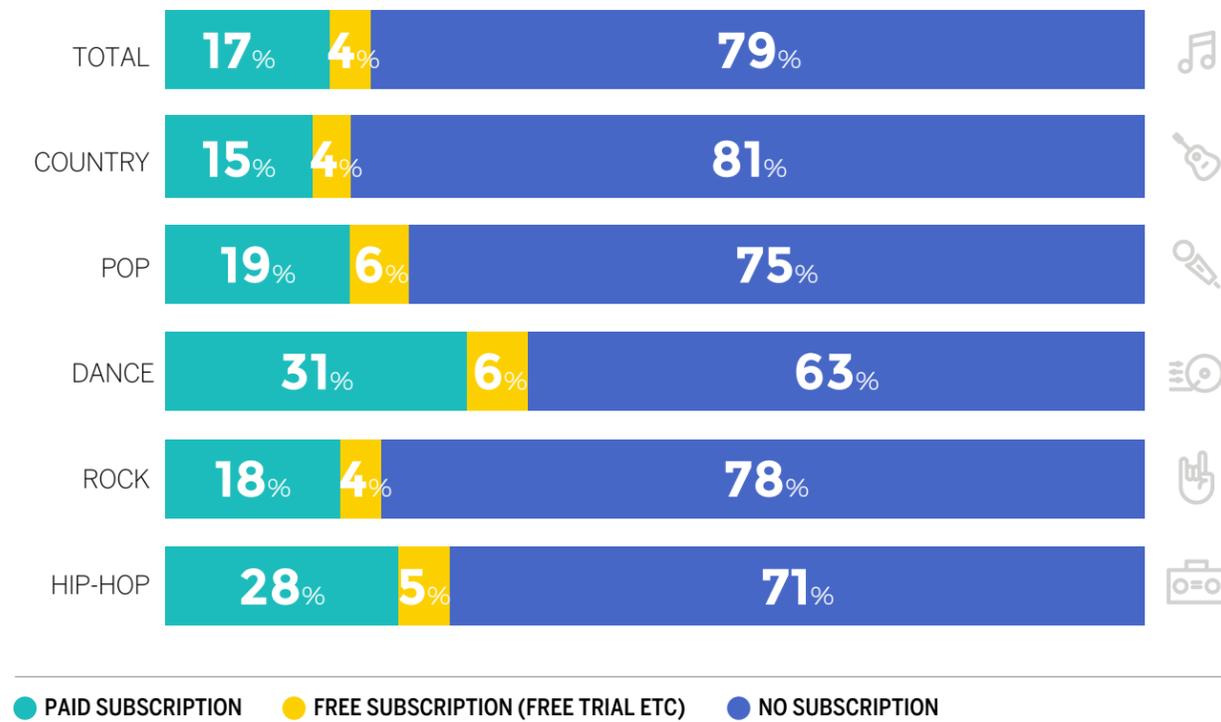
Which of the following music products have you acquired for yourself or have been given as a present in the past 6 months?
Base: 3014 Respondents

31% OF DANCE FANS HAD A PAID MUSIC STREAMING SUBSCRIPTION

Paid Music Subscriptions

We recorded significant over-indexes on paying for a subscription to a music streaming service. Whilst 17% of the total sample had paid for a subscription, 31% of Dance fans and 24% of Hip-Hop fans had done the same.

PAID/PREMIUM MUSIC STREAMING SUBSCRIPTIONS



Do you have a paid/premium subscription to a music streaming service?
Base: 3014 Respondents

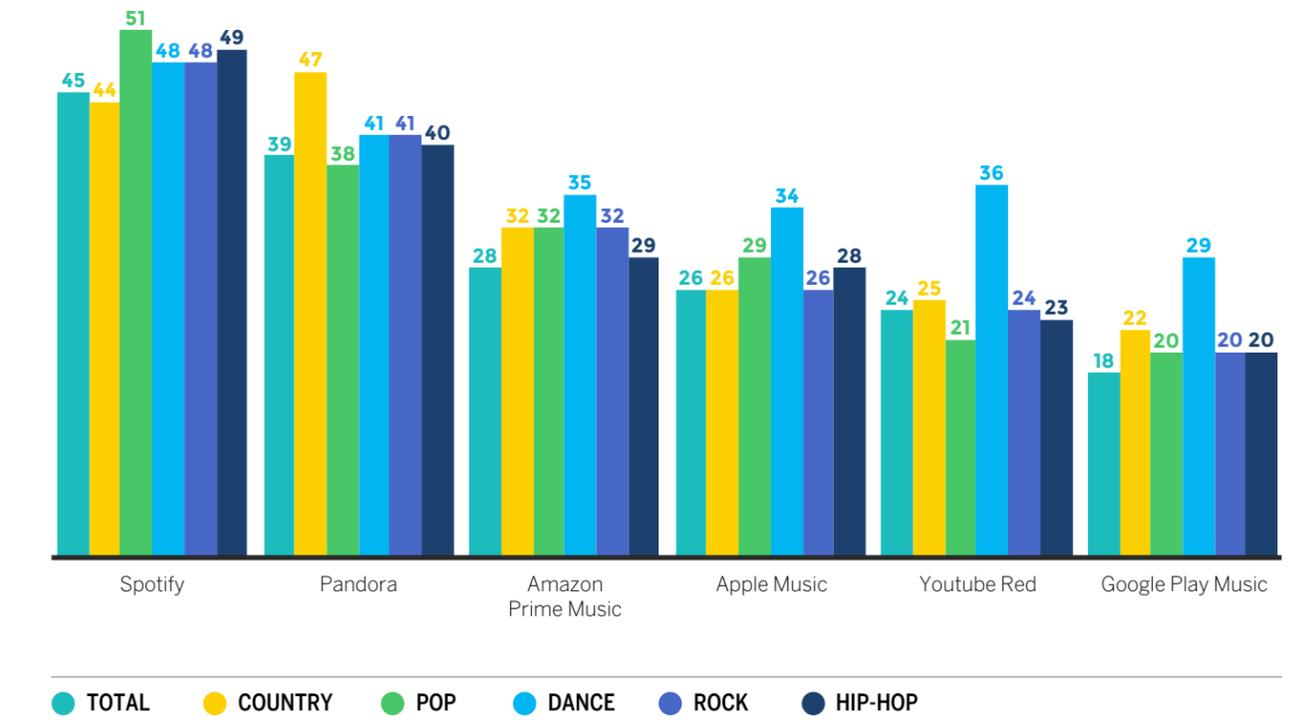
PAYING POP FANS SUBSCRIBE TO SPOTIFY

All who have subscribed to a music streaming service

Dance fans who purchased a paid subscription to a music streaming service, over-indexed on subscriptions to all measured streaming platforms, particularly Apple Music and YouTube Red.

Pop fans meanwhile were much more likely to subscribe to Spotify.

STREAMING SERVICES SUBSCRIBED TO



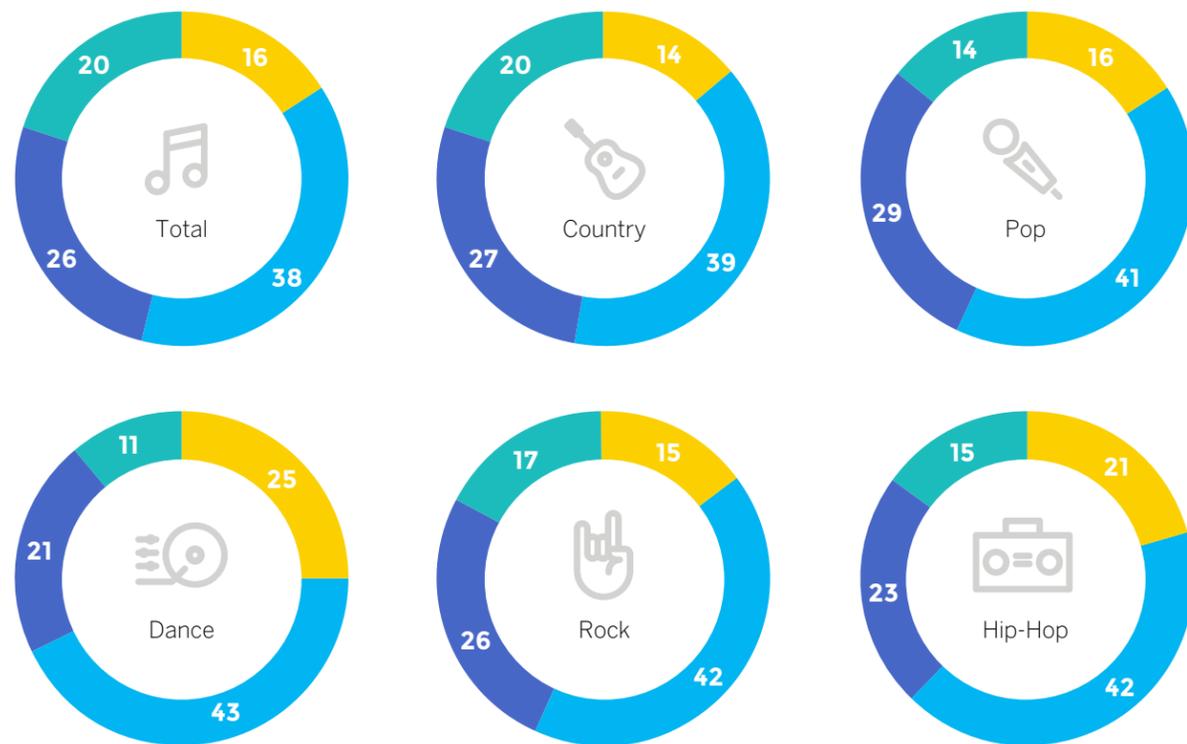
Which of the following do you have a premium subscriptions to?
Base: 607 Respondents

DANCE & HIP-HOP FANS WOULD PAY FOR HIGH QUALITY AUDIO

Hi-Res sound quality uptake

25% of dance fans and 21% of Hip-Hop fans said they would definitely be prepared to pay a premium for music of a superior sound quality, much higher than the survey average (16%).

PAYING A PREMIUM FOR MUSIC OF A SUPERIOR SOUND QUALITY



● I WOULD DEFINITELY BE PREPARED TO PAY A PREMIUM ● I WOULD CONSIDER PAYING A PREMIUM
● I WOULD BE FAIRLY UNLIKELY TO PAY A PREMIUM ● I DEFINITELY WOULD NOT PAY A PREMIUM

Base: 3014 Respondents

DANCE FANS ARE THE MOST ACTIVE ILLEGAL DOWNLOADERS

Total Sample

Dance Music fans were the most active illegal downloaders, with 43% saying they'd used a pirate service at least once over the past 6 months. Pop and Hip-Hop fans were also more likely to use stream ripping sites. Whilst the total sample average was 15%, 27% of Dance fans and 22% of Hip-Hop fans had used such services.

DOWNLOADING MUSIC FROM ILLEGAL SOURCES

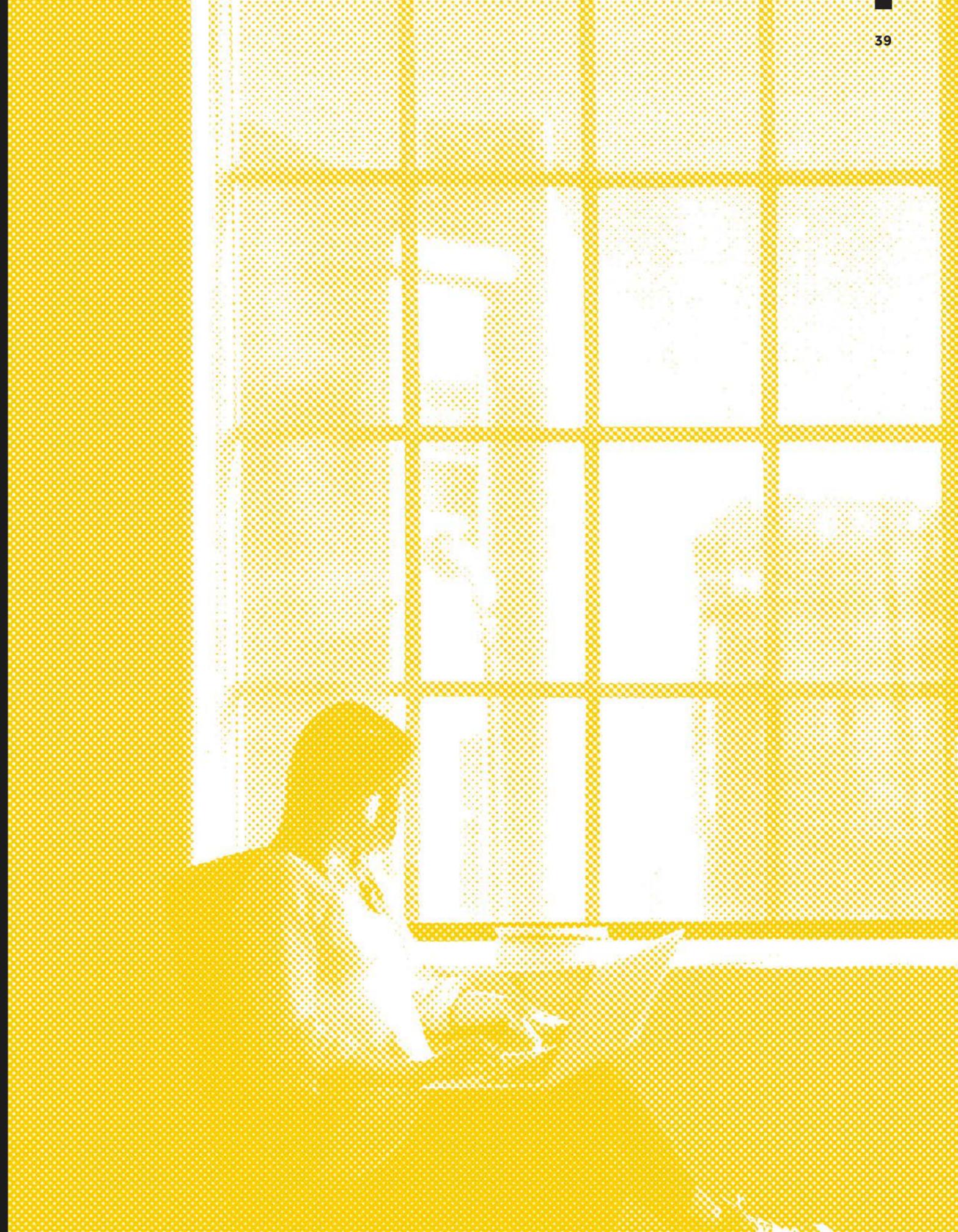
	BitTorrent	Cyberlocker sites	Stream ripping sites and software	Other free sites	None of these
TOTAL	8%	7%	15%	2%	76%
COUNTRY	7%	6%	13%	2%	80%
POP	8%	6%	18%	2%	75%
DANCE	19%	15%	27%	3%	57%
ROCK	8%	6%	16%	3%	76%
HIP-HOP	11%	8%	22%	2%	69%

Over the past 6 months, have you download music from any of the following?
 Base: 3014 Respondents



SECTION 5:

Social Media Usage



DANCE, POP & HIP-HOP FANS ARE SOCIAL MEDIA HEAVYWEIGHTS

Social Media Usage

Pop, Dance and Hip-Hop fans used social media platforms much more regularly than the general population. Dance fans in particular heavily over-indexed on usage of YouTube, with 55% fans using the platform everyday (compared to 18% amongst the general population). Meanwhile, Hip-Hop fans exhibited a preference for using Instagram and Snap chat, much higher than the survey average.

SERVICE USAGE REGULARITY & AWARENESS

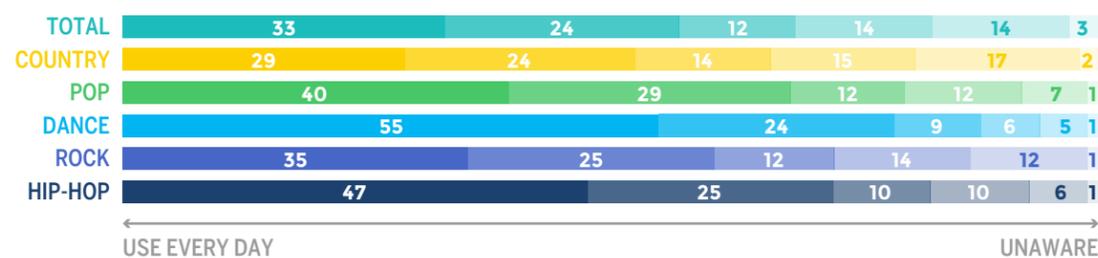
SCALE:



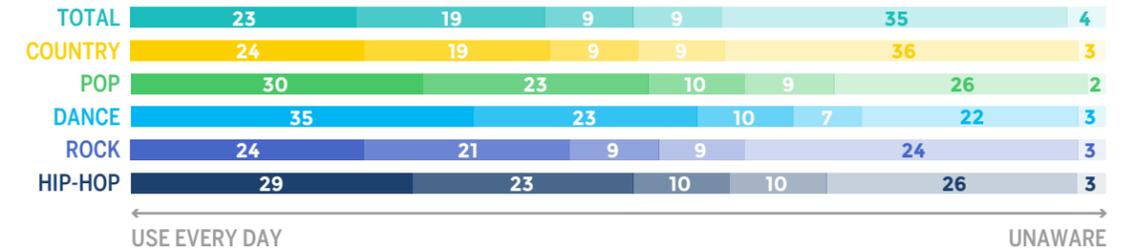
facebook



YouTube



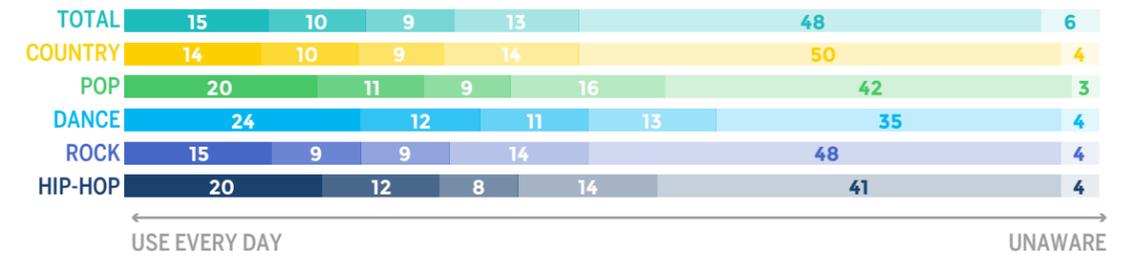
NETFLIX



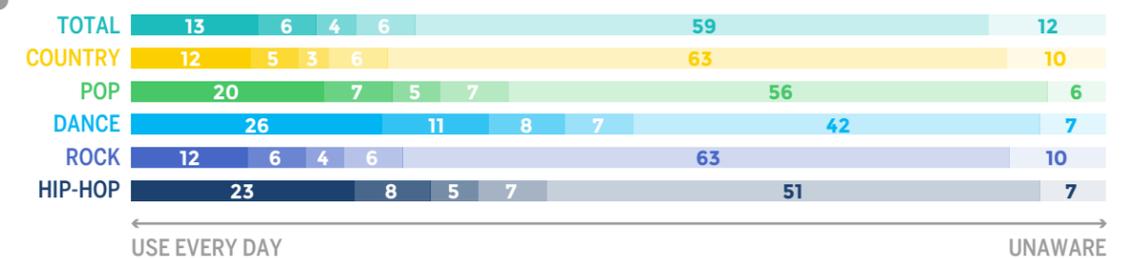
Instagram



Twitter



Snapchat



Question: Which of the following statements best describes you in relation to each of the following web-based services?
 Base: 3014 Respondents

SECTION 6:
Brand Advocacy

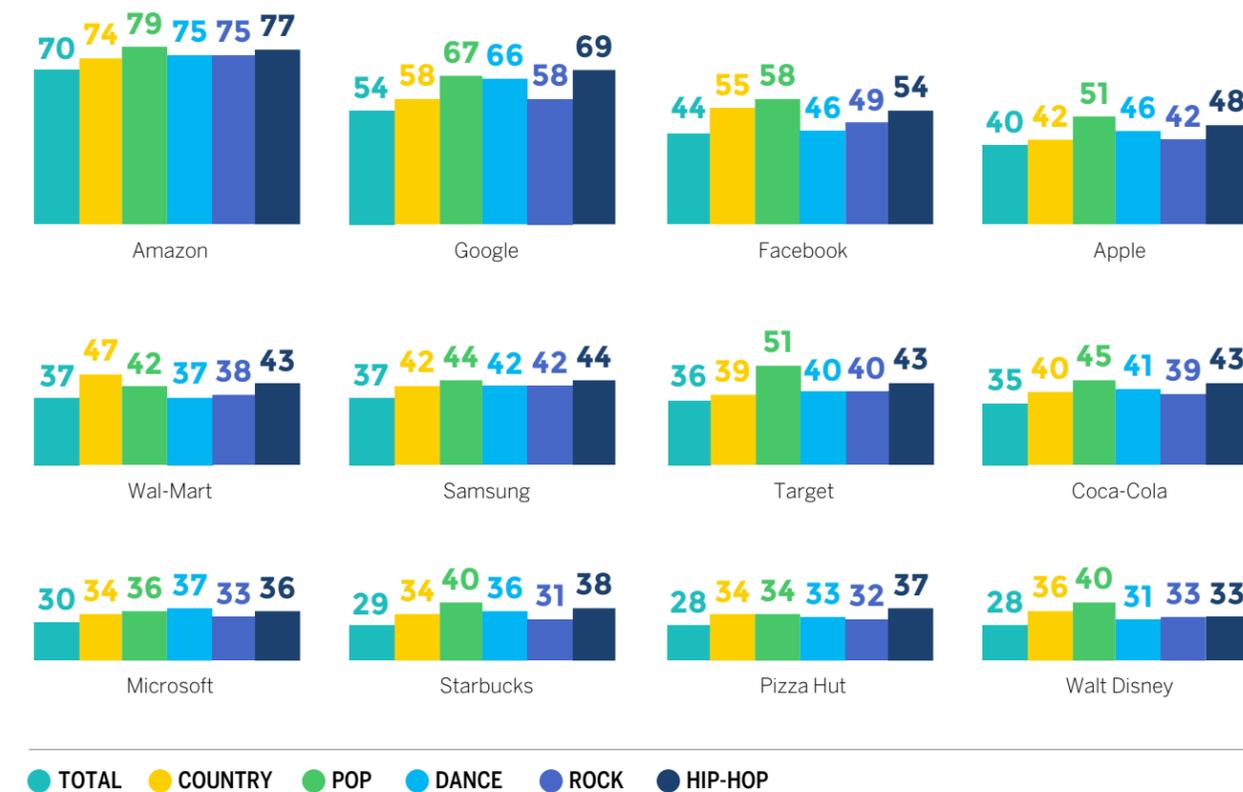
DIFFERENT FANS' BRAND ADVOCACY

Total Sample

All of the five genre categories over-indexed on most of the tested brands, compared to the total sample. Pop fans would be more likely to recommend Amazon, Facebook, Apple, Target and Coca Cola. Dance fans were more likely to recommend Microsoft, Samsung, Facebook and Starbucks. Meanwhile, Hip-Hop fans showed high advocacy for Google, Pizza Hut and Starbucks, whilst Country fans were likely to recommend Wal-Mart.

Please note: 70+ brand comparisons are available upon request.

TOP BRANDS BY MUSIC TASTE



Which, if any, of the following brands products/services would you recommend to others?
Base: 3014 Respondents

Thank You

For any questions about this report,
please contact our Music Industry Lead:

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