

2017 Music Consumption

The Overall Landscape



As new ways of listening start to fuel an economic recovery for the music industry, they are also reshaping the way listeners discover and consume music, and in turn, this is impacting the way the music industry operates.

As a result, all working in music, whether it be management, publishing, broadcasting or retail, must keep their finger on the pulse of the constant changes in consumer audio consumption, understand how these changes may impact the industry as a whole, and utilize this knowledge to continue to adapt.

This report encapsulates a democratic measure of audio consumption in the US, and sees a statistically and demographically representative sample of the 16+ population answer a set questions about their listening and music consumption habits.

This leads to robust profiles, in terms of demographics and psychographics, of listeners across all formats, platforms and devices.

As a result, the report uncovers the overall music consumption landscape, how it is changing, and how these changes may impact the music industry's macroenvironment. It is, therefore, an invaluable tool for any company or person operating within music, and the creative industries at large.

In addition to this, on a granular level, audiences were also investigated across a range of topics, including: music discovery and spending, paid uptake, usage and perceptions of music streaming services, the role of playlisting in music discovery & consumption, and much more.

For the first time this year the study also included a measurement of other forms of entertainment, outside of music listening: watching live television, watching episodes/films on online video streaming (Netflix etc.) and investigating how music performs in the ever increasing competition for consumer attention.

Robert Delmonte Music Industry Lead AudienceNet robert@audiencenet.co.uk

US Sample

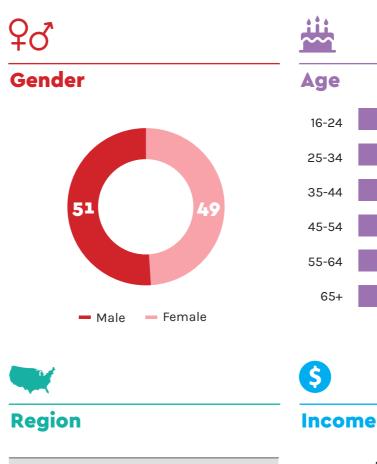
A statistically and demographically representative sample of the 16+ year old US population

To guarantee national representation, quotas were set for: Gender, Age and Geographic Region, in accordance with the 2010 US census. All respondents had online access.

Fieldwork was completed June 2017. The demographic profile of those surveyed was as follows:

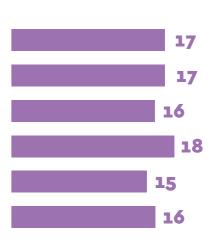


ji 3006 respondents



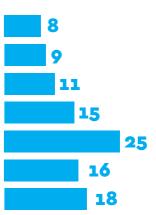
NORTHEAST	18%	41 5171
		\$15K t
MIDWEST	22%	\$25K t
SOUTH	37%	\$35K t
		\$50K t
WEST	23%	













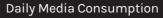
Media Consumption

- Overall Media Consumption
- Preferred Media Source
- Time on Each Source
- Share of Listening
- Weekly Reach
- Platforms

Overall Media Consumption

Listening to music was the second most popular media form at 83%, succeeded only by viewing content on social media (87%).

at 70%.



View social media content Listen to music

Watch terrestrial television

Watch episodes/movies on online video streaming platforms

Play video games

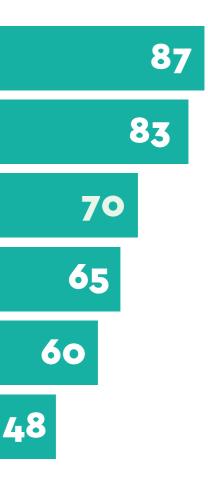
Play sport/exercise

None of the above ъ



Watching terrestrial television followed as the third most popular media source

65% had watched episodes/movies via online streaming platforms and 60% played video games, while 48% partook in sport/exercise.



Which, if any, of the following activities do you carry out on a typical day? Base: 3006 Respondents

Preferred Media Source

Overall, watching terrestrial television and episodes/ movies on online video streaming platforms (Netflix etc.) were the most preferred activities across the total sample, both with 26% shares.

Despite being one of the most popular media sources, watching terrestrial television, a more traditional format, accounted for just an 8% share of 16-24 year old preference, and this rose proportionately as respondents got older.

Modern forms of media consumption, such as watching episodes/movies via online streaming platforms and playing video games were the most popular

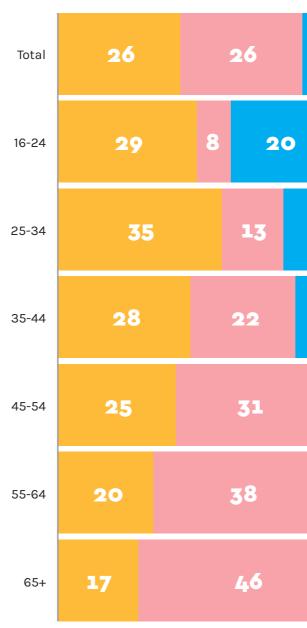
entertainment formats among younger respondents, with each taking majority shares (29% and 25% respectively) among the 16-24 age group. Preference for playing video games then decreased proportionately as respondents got older. However, before also dropping with age, watching episodes/films on online video streaming platforms peaked among 25-34 year olds (35%).

Apart from a peak among the 55-64 year olds (17% vs. 13% average), preference for listening to music was relatively consistent across the age groups. Viewing social media content was also similar across the age groups, aside from a dip among 55-64 year olds (13%), and with a peak among 16-24 year olds (20% vs 17% average).

Preferred media source | All those who carry out each activity in a 'typical' day

Watch episodes/movies on online video streaming platforms

- Watch terrestrial television
- View social media content



- Listen to music
- Play video games
- Play sport/exercise

	17	2	L3	:	L3	6			
	13		2	25					
1	8	12	2	1	6	7			
	18	1	1	1	4	6			
	1	8	1	1	9	6			
	13	5	1)	7	5	7			
		16		11	5	6			

Question: Of the activities you stated you do, which do you like to do the most? Base: 2968 Respondents

Time on each source

Respondents who carried out the tested activities were then asked how long they roughly spend doing each in a typical day. Responses were accumulated, allowing the average time listening (in minutes) to be calculated.

Overall, at 237 minutes on average, respondents spent more time watching terrestrial TV than any other activity, and time spent watching rose proportionately as respondents got older, peaking among those aged 65+ (273 minutes).

Apart from terrestrial television, 16-24 year olds spent longer consuming each media source than any other age group. More modern, digital forms of consumption: watching episodes/films on video platforms (Netflix etc.), playing video games and viewing social media content, recorded the highest usage among the youngest age group (peaking at averages of 168, 159 and 153 minutes among 16-24 year olds respectively). Time spent consuming these formats decreased as respondents got older.

Time listening to music also peaked with the youngest age group, at 180 minutes among 16-24 year olds. Time spent listening decreased through the older age groups, until reaching a low of 122 minutes listening per day among those aged 65+.

minutes Watching terrestrial TV

162 minutes Listening to music

minutes

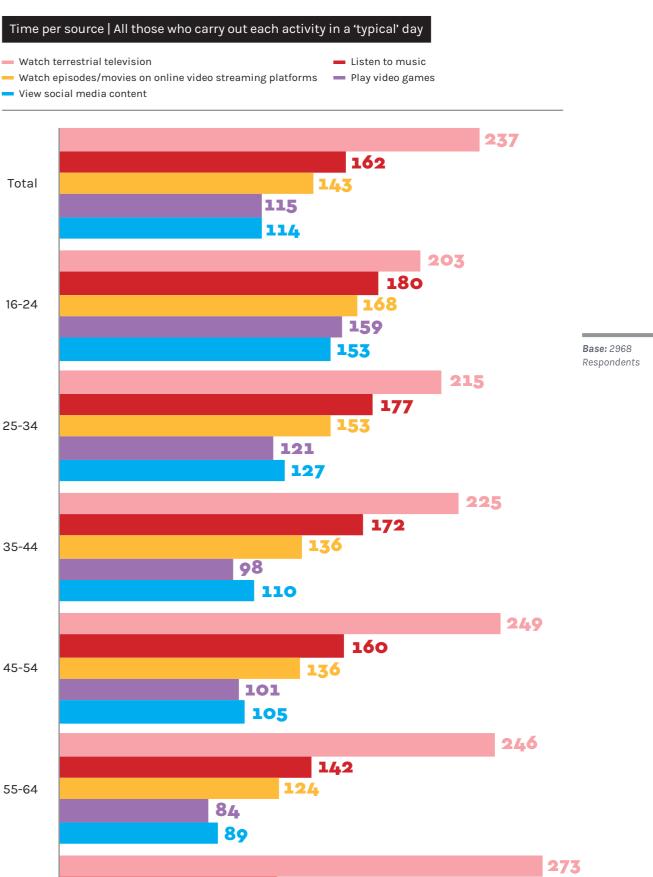
Watching episodes/films on online video platforms

115 minutes

Playing video games

114 minutes

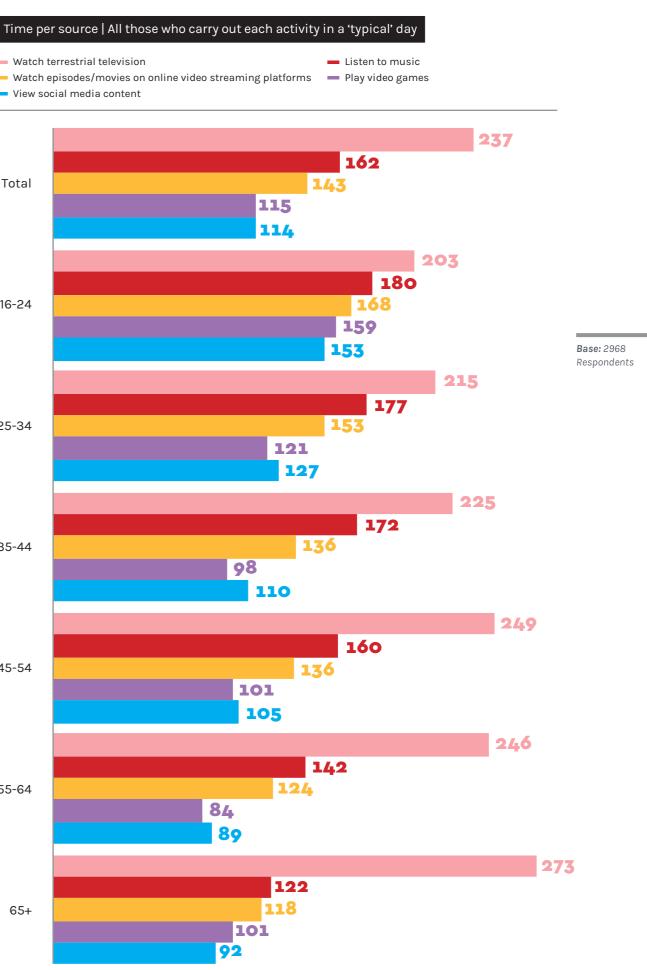
Viewing social media content











Share of Listening

AM/FM Radio captured a third of total listening time, consolidating its position as the most popular listening source in the US.

On demand streaming accounted for twice as much listening time than Digital Downloads, and over four times as much as CDs. After AM/FM Radio, On demand streaming was the second most listened to source, accounting for 26% of daily listening, double that of Digital Downloads (13%) and over four times that of CDs (6%).

Internet Radio sources (Pandora etc.) accounted for 10% of listening time, while Satellite Radio accounted for 6%, and AM/FM Radio stations streamed online accounted for 3%.

'Share of listening' can be defined as: the portion, or share, of respondents' total listening time each format accounted for.

Share of listening 2017 vs 2016 0: -1% AM/FM Radio 26% **+2%** On demand streaming 13% 1 1 +1% Digital downloads/files 10% 3 0% 0: Other internet radio 6% 0 -1% CDs 6% $\mathcal{K}_{\mathcal{Y}}$ 0% Satellite Radio 3% 5 -1% AM/FM Radio Stations streamed online 1% 0% -Vinyl

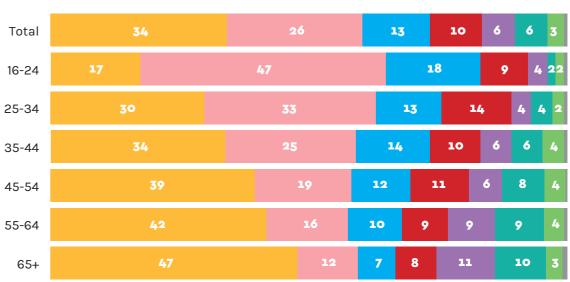
To the nearest 15 minutes, how is your music listening time normally split between the following sources? **2016 Base:** 2808 Respondents **2017 Base:** 2494 Respondents

A huge disconnect in format preference is apparent between age demographics indicative of changing consumption habits, as younger generations shun traditional methods of listening, opting instead to use digital methods of consumption.

Despite being the most popular format overall, time spent listening to AM/FM Radio was very low among the youngest demographic. AM/FM Radio accounted for jus 17% of 16-24 year olds' listening, approximately half that the national average (36%). Radio usage is instead drive by older demographics, with the format's listening share

Share of listening by age





ce	growing proportionately as respondents
s,	got older, until peaking among 65+ year
•	olds (47%). Satellite Radio and CDs showed
	similar patterns, dipping among younger
	age groups before growing as respondents
۱g	got older and peaking among those aged
	65+.Younger generations instead dedicated
	the majority of their listening to On
	demand streaming. Streaming accounted
	for almost half (47%) of 16-24 year olds'
ne	music consumption, a significant over-
st	index compared to the national average
at of	(26%), and for a third (33%) of 25-34 year
ven	olds' listening, another significant over
are	index.

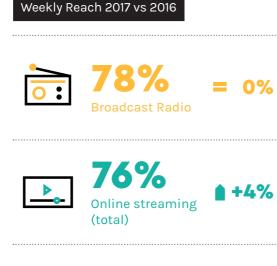
Question: To the nearest 15 minutes, how is your music listening time normally split between the following sources? **Base:** 2494 Respondents

Weekly Reach

Broadcast radio leads weekly reach, albeit slightly at 78%; overall online streaming followed closely at 76%, predominantly driven by On demand streaming (69%).

Internet radio, Digital Downloads and Physical formats slip. Reach of internet radio suffered the harshest dip, falling by 10%, from 43% to 33%, YOY. Digital Downloads and Physical formats also fell, but only by 3%, from 33% to 30% and 23% to 20% respectively.

'Weekly reach' can be defined as: used at least once, for five minutes or more, over a weekly period. Please note: 'Online Streaming (Total)' is the net of 'On demand streaming' and 'Internet radio', and 'Physical' is the net of 'CD' and 'Vinyl'.



59% On demand streaming

+8%



30% -3% Î **Digital Downloads**

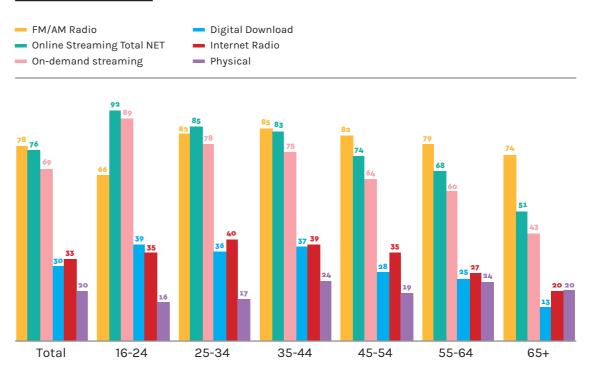
20% -3% 0 Physical

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: 2016: 3014 Respondents Base 2017: 3006 Respondents

FM/AM radio is still reaching two third of 16-24 year olds, despite low share of listening.

In terms of reach (listened to for at least five minutes in the last seven days), FM/AM radio was relatively high and similar across the age groups, except, importantly among 16-24 year olds, where it fell to 66%. Despite this lower reach, it is important to note that the format is s reaching two thirds of 16-24 year olds. However, when comparing this to radio's low share of listening (share time spent listening, slide: 10) among the same segment, it is clear that a disconnect is apparent within the youngest age group.

Weekly Reach by age



ds	While radio succeeds in reaching the
F	majority of younger respondents, it is
I	failing to engage them, reflective in the
	minimal time they spend listening to the
	format, which is instead dedicated to
h	online formats.
Ι,	Online streaming reach peaks among
S	younger age groups and falls with age.
till	9 in 10 (92%) 16-24 year olds listened
	to an online streaming source over a
of	weekly period. This fell proportionately as
ent,	respondents got older, to just 51% among

those age 65+.

15_Music Consumption

Which, if any, of the following have you used in order to lister to audio content (music or speech) for five minutes or more at any one time during the last seven days? Online Streaming (Overall) = On demand streaming + Internet radio (NET) Base: 3006 Respondents

Platforms Platforms Platforms

YouTube and Spotify take the majority shares of On demand listening, with 33% and 26% respectively.

What Spotify lacks in reach, it makes up in time spent listening. Despite YouTube's weekly reach doubling that of Spotify's (see slide: 18), the gap between the two platforms' share of listening was somewhat less dramatic (just 7%). This indicates that while YouTube reaches more people over a weekly period, Spotify users spend a lot more time listening to Spotify, than YouTube users do to YouTube. As a result, it can be determined those who listen to Spotify are much more engaged with Spotify, than YouTube users are with YouTube. The gap between YouTube and Spotify closes among younger listeners. Around a third (35%) of 16-24 year olds' On demand streaming time was dedicated to Spotify, almost closing the gap to streaming leader YouTube (37%). Looking at the older age groups, uptake of Amazon music services (Prime and Unlimited) was highest among the older age groups (between 14-16% among 45-64 year olds).

On der	mand st	treamin	g: Platfo	rm shai	res
		Music =	Apple N Amazo Google Other N	n Music U Play Mus	
TOTAL	16-24	25-34	35-44	45-54	55-64
33	37	32	26	32	36

25

9

9

7

4 5

35

5

16

11

6 6

6

26

11

8

6

4

21

14

8

5

7

6

22

15

7

5

7

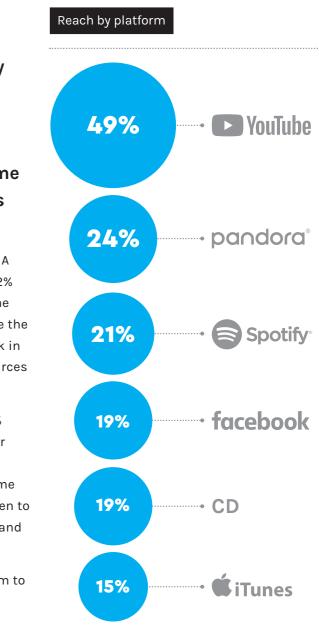
2

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:** 3006 Respondents YouTube has the highest penetration in terms of weekly reach. With almost half (49%) of respondents stating they listened to music on YouTube for five minutes or more at least once a week, the video streaming platform was the leading source of music access by some margin; almost double the reach of its biggest competitor, Pandora (24%).

CD falls below Spotify for the first time, albeit slightly. A 3% decrease in weekly reach of CDs since 2016 from 22% to 19%, sees Spotify (21%) close the gap and surpass the physical format for the first time, if only by 2%. Despite the minimal difference, this is another notable benchmark in consumers' increased adoption of online listening sources over traditional formats.

Facebook rises, outperforming iTunes. Since 2016, a 7% growth for Facebook (from 12% to 19%), and a 3% fall for iTunes (from 18% to 15%), saw Facebook replace iTunes as the 4th most accessed audio platform. Amazon Prime Music equalled iTunes' reach at 15%, being used to listen to music more than iHeartRadio (12%), digital files (10%) and Podcasts (8%).

No more than 7% of the sample used any other platform to listen to music over a weekly period.



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:** 3006 Respondents

Platform Reach

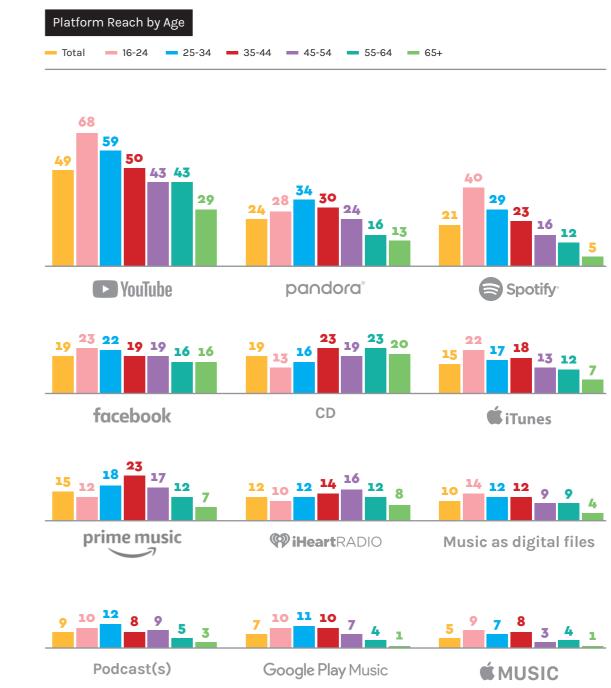
Somewhat expectantly, given the aforementioned share of listening and topline reach figures, younger generations are driving the overall reach numbers of popular On demand streaming platforms: YouTube and Spotify.

YouTube is the dominant source of millennial music access. 68% of 16-24 year olds and 59% of 25-34 year olds used the platform to listen to music for at least five minutes over a weekly period; both significant over-indexes.

Spotify reach doubled among 16-24 year olds. Spotify skewed young, reaching 40% of 16-24 year olds over a weekly period, twice that of the national average (21%). The 25-34 age group also showed a significant over-index (29%). Pandora peaked among 25-34 year olds, and Amazon Prime Music among 35-44 year olds. Pandora grew through the younger age groups, peaking at 34% among those aged 25-34, before dropping proportionately as respondents got older. Amazon Prime Music showed a similar pattern, growing through the younger age groups, but peaked slightly older at 23% among those aged 35-44.

Fewer younger users are listening to CDs; just 13% of 16-24 year olds listened to a CD over a weekly period, an underindex in comparison to the national average (19%).

40% of 16-24 year olds used Spotify over a weekly period



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: 3006 Respondents





- Share of Listening by Device
- Device Listening by Age
- Device Ownership

Share of Listening by Device_

When netting all tested radio receivers (FM/AM, in-car FM/ AM, Satellite Receiver, incar Satellite Receiver), radio devices took the majority share of total time spent listening at 35%.

On an individual level, the Mobile/ Smartphone was the most listened to device. At 19%, time spent listening to the mobile/smartphone is roughly the equivalent to the combined listening across laptops and desktop computers (9% each), which accumulates to 18%.

Aside from the in-car and standalone CD players, (6% accumulated), no other device accounted for more than 5% of total time spent listening.

*Share of listening by device can be defined as: the portion, or share, of respondents' total listening time across each device accounted for.

9

Lapt 9

Desk

6



Share of Listening by Device

Cellph

Smar

19

ione/ phone		In-car FM/AM Radio 17						
4 Radio /er	p a c	h-car hone udio onne- tion	Ipod 3		Tak IPa etc			
op uter	s li R		CD Play 3	er		s eak		
p/Netbook		elevisi	on					
		n-car C layer						

To the nearest 15 minutes. how is your music listening normally split between the following devices? Base: 2494 Respondents

Device Listening by Age_

Radio receivers and CD players go relatively unused by younger generations.

As a further reflection on younger generations' disengagement with traditional formats, listenership to radio receivers (both FM/AM & DAB) and CD players was very low among 16-24 year olds and grew in linear fashion as respondents got older, peaking among those age 65+.

Instead, the Smartphone dominates younger listening. Conversely, Smartphone listening peaked among the youngest age group, 16-24 year olds, accounting for over a third their listening time at 34%. Smartphone listening was also equal to FM/AM Radio among 25-34 year olds (24% each), before falling gradually with age, to just 4% among those aged 65+.

Please note: in-car and standalone FM/AM, DAB devices and CD player devices have been netted here.

Device **Ownership**

Smartphone leads ownership. 87% of respondents said that they owned a smartphone, the highest ownership level of all tested devices.

Television held strong. The television was the 3rd most owned device at 76%, succeeded very slightly by Laptop/ netbooks at 78%, It is however, holding on to an older audience, with only 60% of 16-24 year olds owning one; a significant under-index in comparison to the national average (76%).

Top Devices by Age

22_Devices

- FM/AM Radio receiver NET
- Desktop computer
- CD Player NET
- Cellphone or Smartphone Laptop or netbook
- In-car phone audio connection Satellite Radio Receiver NET

Tablet (iPad etc.)

- Other NET*

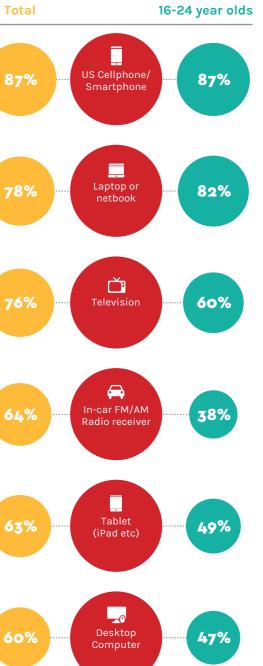
iPod

15 minutes, how is your music split between the following devices? *Other NET includes: 'Other', Television, Wireless speakers, Vinyl Player, PlayStation, Amazon Echo. Xbox, Google Home and Smartwatch Base: 2494 Respondents

To the nearest

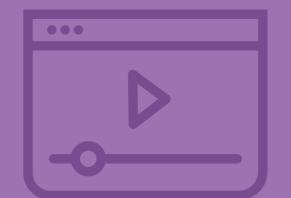
Total		29			19			9	9	6	6	5	4	4	10
16-24	13		3	4			9		1	6	22	7	5	3	9
25-34	2	24		1	24			9	9	4	5	6	3 4		12
35-44		30			20	•		9	7	6	5	6	3	4	10
45-54		34			1	5		11	7	7	7	8	3 4	4	8
55-64		36			9		10	6	9		9	3	4	4	11
65+		42				4	8	6	1	2	8	4	3	4	11

Device Ownership



Which, if any, of the following devices do you own? Base: 3006 Respondents

23 _Devices



Streaming Uptake & Perceptions_

Paid/Premium Music Streaming Subscriptions_

24% of US respondents initially stated that they have a premium subscription to a streaming service.

However, upon filtering, 19% actually paid for a service, while 5% used a service on free tiers (e.g. a free trial, bundle deal, or accessing premium tiers through someone else's account/family bundle). Paid subscriptions were prevalent among millennials and skewed male. 3 in 10 16-24 and 25-34 year olds had a paid subscription to a streaming service, overindexing significantly at 30% each (in comparison the general population at 19%). Paid subscribers also tended to be male, with 22% of men stating they paid for a premium subscription, compared to 16% of women.

Paid/Premium Music Streaming Subscriptions



Question: Do you pay for a premium subscription to a music streaming service? Base: 3006 Respondents

Paid Streamers

'Free trial' emerged as the most effective conversion method. The leading option which converted users to paid subscriptions was liking a free trial and deciding to pay for a fully paid tier (41%). The following 3 most popular options (each around 30%) also mentioned using free trials and then subscribing to receive additional benefits (removing adverts, offline music access etc.).

Offline mobile access was fundamental to young subscribers. Offline mobile access to music was key to 16-24 year olds, rising to 39% from the 27% national average, making it the top option among the age group. Paying for other additional benefits was also important to 16-24 year olds – 35% paid to remove advertisements, while 34% paid to listen to tracks they can specifically choose.

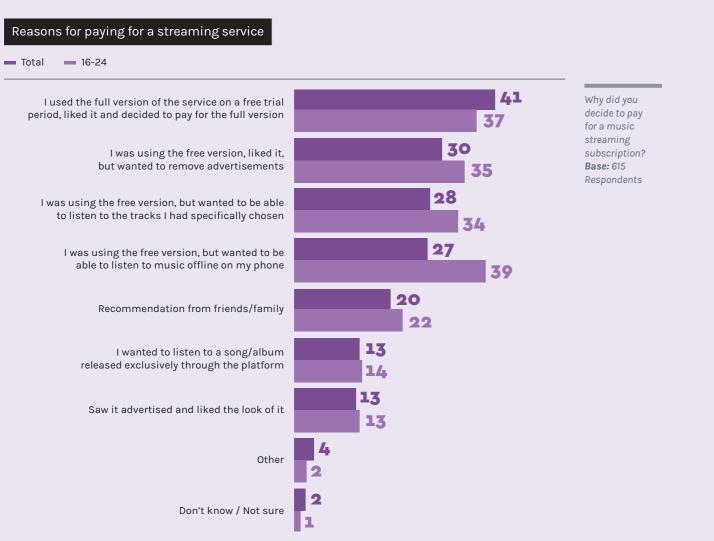
Exclusives have little conversion weight. Only 13% of respondents decided to pay to listen to a song/album released exclusively through the platform; the least commonly selected reason among all tested, alongside 'saw it advertised and liked the look of it' (also 13%).

Unpaid Streamers

While the free trial served as a key driver amongst Paid subscribers, free tiers are enough for some, especially among younger respondents.

This highlights a conversion issue, questioning whether the freemium model is sufficient enough in funnelling free users into paying subscribers; almost half (46%) of those without a paid subscription were happy using the free version with adverts. However, the satisfaction with free tiers means users are less likely to pay for a premium service, and in an attention, access driven economy, this is cause for concern. This figure is also higher among those aged 16-24 at 53%.

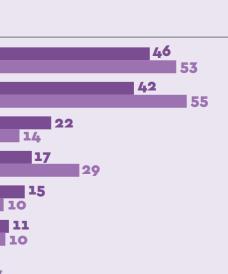
Expense and YouTube are major deterrents among the youngest age group. 42% of respondents stated they had not subscribed to a music streaming subscription service because it was 'too expensive/ they can't afford it,' and this rose to 55% among 16-24 year olds, perhaps reflective of their lower purchasing power. Furthermore, almost 3 in 10 16-24 year olds prefer listening to YouTube to paying for a music streaming subscription (29% compared to the 17% national average), thus rendering the service a prominent deterrent in converting younger listeners to paid subscribers, particularly if the option of free tiers was to be removed.



Reasons for not paying for a streaming service

Total **—** 16-24 I'm happy using the free version with adverts It's too expensive/I can't afford it I prefer to listen to music in a different way I prefer listening to music on YouTube I already have too many monthly subscriptions Music isn't that important to me The music I want to listen to isn't available There's just too much music (hard to choose what to listen to) I don't understand/feel comfortable with the technology The personalisation/recommendations aren't good enough The audio quality isn't good enough Other Don't know / Not sure

03



Question: Why have you not subscribed to a music streaming service? **Base:** 2291 Respondents



Music Discovery_

52 8-8 8+

- Music Discovery
- 'Go To' Source Post Discovery
- Singles, Albums & Playlists
- Playlists Listened To

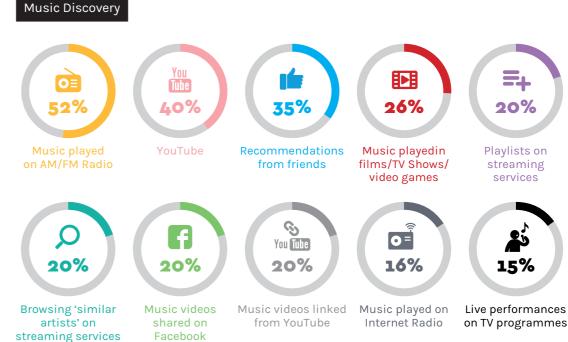
Music **Discovery**

FM/AM Radio leads music discovery.

The only options selected by more than a quarter of the sample were: FM/AM radio (52%), YouTube (40%), which leads online discovery, recommendations from friends (35%), which fell below YouTube for the first time this year, and music played in films/ TV shows/video games (26%).

Online discovery grows in importance. In terms of online discovery, YouTube leads at 40%, as well as 20% discovering music through videos linked through the platform (recommended page, through the sidebar etc.). Streaming services (Spotify,

platform.



Apple Music etc.), rose in prominence this year with a fifth of the total sample discovering new music through playlists on streaming services and through using the 'browse similar artists' feature on such services (20% each); a major indication of the influence these services are starting to have on music discovery. Facebook was also equal to these methods, with 20% discovering new music through the

Aside from Internet Radio (16%), live performance on TV (15%) and music videos on TV (13%), no more than 10% discovered music through any other method than the ones mentioned here.

> How do you typically discover music? Respondents were asked how they 'typically' discover new music: music didn't have to be new in terms of release date, just new to the respondent. Base: 3006 Respondents

26% Music playedin Playlists on films/TV Shows/ video games 0= 16%

Internet Radio

=+ 20%

> streaming services



on TV programmes

Music Discovery by Age

Online sources lead discovery among younger generations.

Approximately half of 16-24 (54%) and 25-34 (47%) year olds discovered new music through YouTube, both over-indexes on national average (40%).

Additionally, discovery through playlists on music streaming services was popular among those aged 16-44 years (16-24: 26%, 25-34: 28%, 35-44: 27%), in comparison

to the national average (20%), as well as browsing 'similar artists' on streaming services which showed a very similar pattern.

In contrast, radio and live TV performances were major discovery methods among older age groups. Music played on FM/AM Radio and live performances on TV were more influential among older age groups, with peaks among those aged 45-65+.

Browsing "Similar Artists"

on Streaming Services



Music played in films/

TV shows/video games

30_Music Discovery

Total 16-24 **=** 25-34 **=** 35-44 **=** 45-54 55-64 65+ **Ouestion: How** do you typically 56 58 58 discover music? 54 Base: 3006 52 50 47 Respondents 38 37 36 35 37 37 YouTube Music played on Recommendations FM/AM Radio from friends 26 ²⁸ 26 28 27 25 27 27 26 13

Playlists on

streaming services

'Go To' Source **Post Discovery**

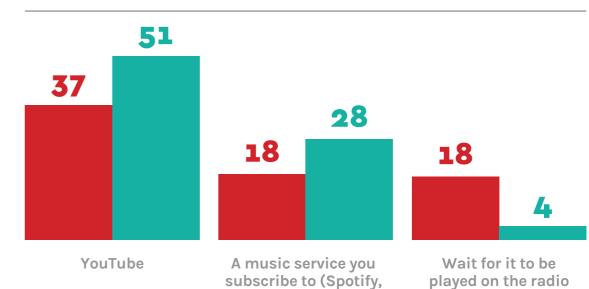
Respondents were then asked, once they had discovered a new piece of music they like, what their 'go to' source was to listen to it.

Respondents could choose one option only. YouTube was the most commonly selected source among the total sample at 37%, followed by listening through a music service they subscribe to and waiting to hear it on the radio (both 18%). Aside from paying to download it (from iTunes etc.) (11%), no other option accounted for more than 9% of the sample's post discovery listening.

— 16-24

Reflective of their overall music consumption habits, main 'go to' postdiscovery sources among 16-24 year olds were YouTube and a music service they subscribe to (Spotify etc.), which accounted for 79% of new music listening (51% and 28% respectively) among the age group. Just 4% would wait for it to be played on the radio, and 12% would download new music, either from iTunes, or illegally on stream ripping sites such as BitTorrent (6% each). The remaining 5% would buy new music on CD/Vinyl (3%) or listen to new music on SoundCloud (2%).





Apple Music, Deezer etc.)



31_Music Discovery

Total

16-2

Ouestion: Once you have discovered a new piece of music that you like, what would you say is your 'go to' source to listen to it? Base: 3006 Respondents

Singles, albums & playlists

Single/Individual tracks are still the most popular music listening format while playlists hold the gap on albums after overtaking last year.

Single/individual track listening remains the dominant listening format, accounting for 52% of total listening time. Playlists (on streaming services),

Singles, Albums or Playlists?

- Single tracks - Albums - Playlists

meanwhile, account for 28%, retaining their lead on albums, which account for just 20%.

In contrast, the older the respondent the more they tend to listen to albums. Album listening shares grew as respondents got older, peaking at 24% among those aged 65+.

Playlists, on the other hand, were most popular among 25-34 year olds, accounting for 33% of their listening.

Playlists Listened To

1/3 of playlist listening time is dedicated to those created by streaming platforms.

Those who stated that they listen to playlists were asked how their listening is split across different playlist sources.

Playlists created by respondents themselves were the most popular, accounting for 54% of playlist listening. Importantly, playlists created by platforms they listen on (e.g. Spotify Discover, New Music Friday etc.) accounted for 33% of playlist listening, a major indication of how influential these playlists are becoming to music consumption and curation.

Playlists created by someone else (friends etc.) accounted for just 13% of playlist listening.





52 20 28 Total 51 19 30 16-24 18 49 33 25-34 **48** 20 32 35-44 17 55 29 45-54 21 55-64 55 24 56 24 20 65+

How is your music spilt amongst the following? Base: 3006 Respondents



Question: Of the playlists that you listen to, what percentage are: Base: 1845 Respondents



Playlists created by someone else (Friends, Experts you follow etc.)



Playlists created by the platform I listen on (e.g. Today's Top Hits, New Music Friday, Spotify Discover etc.)



Music Spending_

- Music Spending
- Amount Spent
- Music Genres

Music Spending

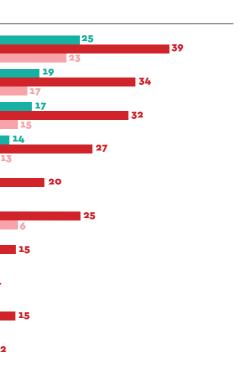
Over half of US respondents (58%) had purchased or been given a music related product over the past 6 months.

Despite its low share of listening and use overall, the CD was the most commonly purchased music product. The CD was the most popular music purchase at 25%, Mp3 singles/tracks followed at 19%. Tickets to concerts/gigs were the third most purchased music products at 17%, and Mp3 downloads were 4th at 14%. No more than 9% had purchased or been gifted the remaining music related products tested.

Music enthusiasts purchased more music products. Those highly engaged with music were more likely to have purchased or been gifted music related products, with 81% having done so over the past 6 months.

Music Spending

Total — High Engagement — Low Engagement
CD Albums/Singles
MP3/Download singles/tracks
Tickets for music/concerts/gigs
MP3/Download albums
Music DVDs
9
Music DVDs
9
Music Merchandise items
9
Music for festivals
6
Pre-paid Music voucher
5
Vinyl Albums
4
Vinyl Singles
2
None of the above



Question: Which of the following music products have you acquired for yourself or been given as a present in the past 6 months? **Base:** 3006 Respondents

Amount Spent

Expensive items such as gig tickets and festival tickets attracted the highest amount of spending.

84% had spent at least \$40 on gig tickets, and importantly, of that 84%, 54% had spent over \$100. Festival tickets showed a similar, yet slightly reduced, trend; 73% had spent at least \$40, and of that 73%, 42% had spent over \$100.

High spending among merchandise and vinyl buyers. Approximately half (49%) of those who purchased music merchandise spent over \$40 on these items over the past 6 months. Vinyl buyers had a similar, albeit slightly lower, level of purchase with 43% having spent over \$40 on vinyl albums within the past 6 months.

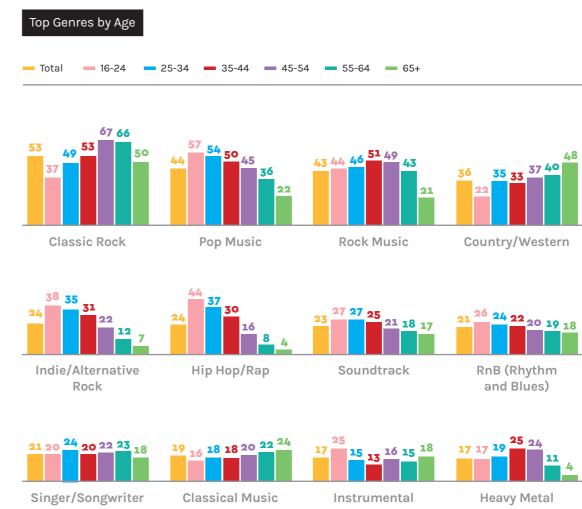
Total Music Spending

Nothing 1¢ - \$9.99	— \$10	- \$19.99	\$20 - \$39	.99 🗕 \$	40 - \$99.99	— \$100)+		
Tickets for Music Concerts/Gigs	6 3 <mark>2</mark>	6	30			54			Question: Roughly how much have
Tickets for Festivals	10	6 5	7	31			42		you personally spent on the
Music Merchandise Items	59	10	27		3	50	3	19	following in the past 6 months Those who had
Vinyl Albums	8	10	16	23		31		12	purchased a music-related product were
Music Streaming Subscription Gift Card	13	20		19	15		25	8	then asked how much they had spent on each
Music DVDs	13	19	-	20	20		24	5	over a 6 month period.
CD Albums/Singles	10	17	22		21		23	7	Base: Various – those who bought each
Pre-paid Music Voucher	15	15	16		29		22	4	product
Vinyl Singles	18		31		15	14	18	5	
MP3 Download Albums	13		27	23	5	18	16	4	
MP3 Download Singles/Tracks	13		44			19	14	8 1	

Music Genres

Classic Rock, Country and Classical all skewed older, with preference generally increasing with age.

Pop, Indie/Alternative Rock, Hip-Hop/Rap and R'n'B, by contrast, had a younger bias, with preference peaking among those aged 16-24 before dropping off proportionately with age.



Which of the following types of music do you generally like? Base: 3006 Respondents

Contact Us_

This report is based on AudienceNet's Audiomonitor US report. The full report provides:



If you have any questions about this report, or for more information about joining the Audiomonitor syndicate please contact: robert@audiencenet.co.uk





Get in Touch:

AudienceNet | 65-67 Leonard Street Shoreditch | London | EC2A 4QS +44 (0)207 729 8059 audiencenet.co.uk @AudienceNet