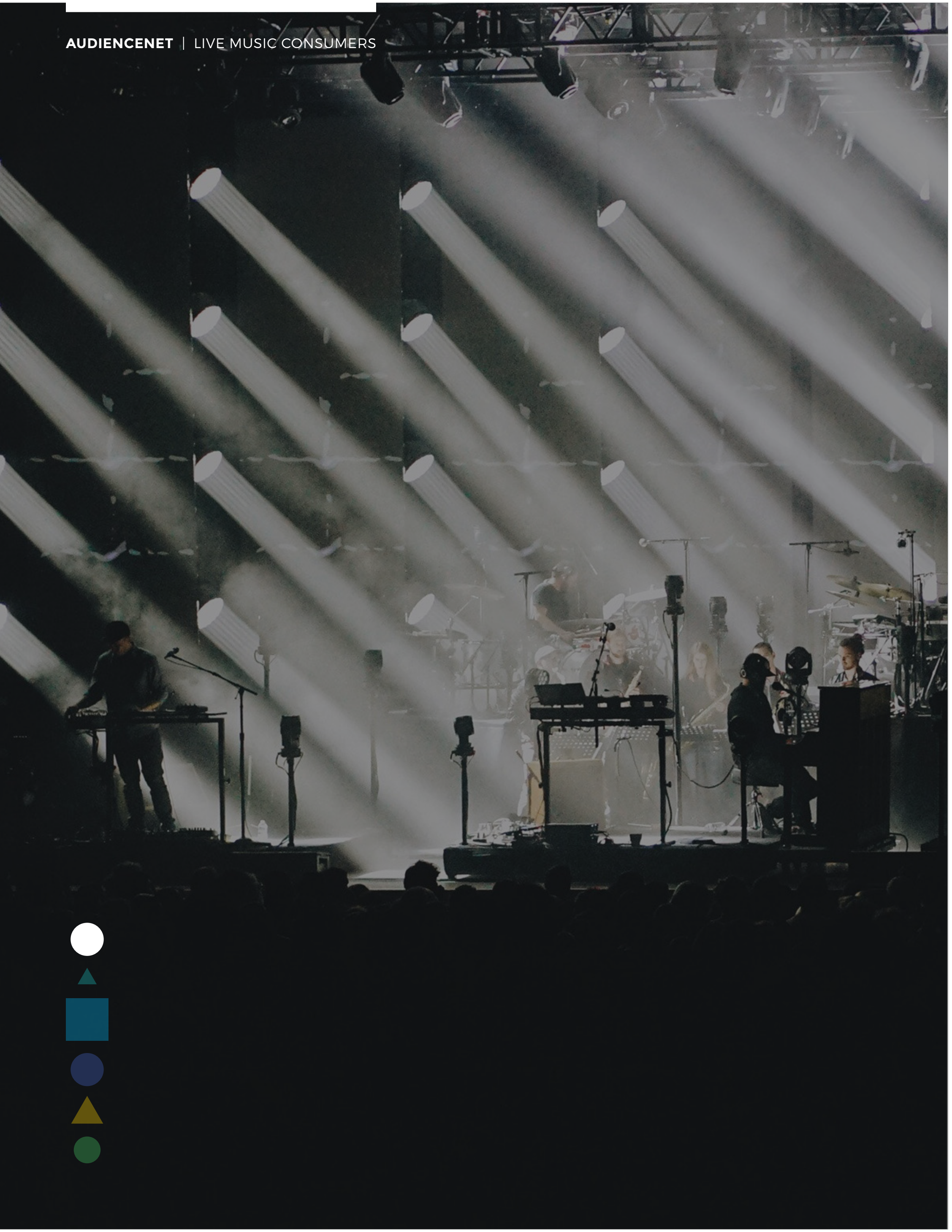
AUDIENCE NET

Live Music Consumers

Who Are They?

November 2017



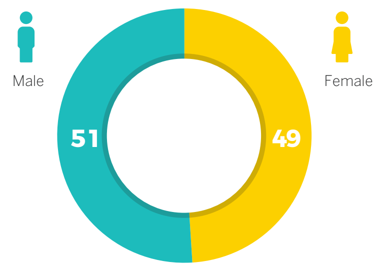
SAMPLE

3,014 Respondents

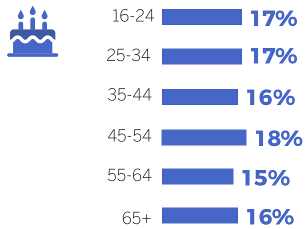
A statistically and demographically representative sample of the US population.

All respondents had online access.

GENDER



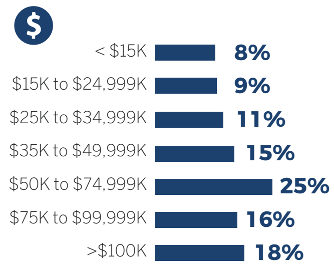
AGE



REGION

NORTHEAST	18%
MIDWEST	22%
SOUTH	37%
WEST	23%

INCOME



LIVE ATTENDEE PERSONAS

Our data revealed the following archetypes for five core musical genres

	GIG/CONCERT ATTENDEES (GIG-GOER)	MUSIC FESTIVAL ATTENDEE (FESTIVAL-GOER)	COACHELLA ATTENDEE	LOLLAPALOOZA ATTENDEE	WARPED TOUR ATTENDEE
GENDER	Both	Both	Female	Both	Female
AGE	16-44	16-34	16-24 or 35-44	16-24	16-34
LISTENS TO	Radio & On-demand streaming	On-demand streaming	YouTube, Spotify iTunes	Pandora & Spotify	Facebook, Spotify, iTunes
SOCIAL PLATFORM	Facebook & Twitter	Instagram	Instagram & Snapchat	Snapchat	Instagram & Twitter
FAVOURITE GENRES	Rock Pop Indie	Indie Hip-Hop/Rap Dance	Pop Hip-Hop/Rap EDM	Rock Singer-Songwriter Indie	Alternative Heavy Metal Punk/New Wave
ADVOCATES OF	Google Target HBO	Gatorade Playstation MTV	Apple Starbucks Nike	Facebook Samsung Adidas	Microsoft Ebay Xbox

SECTION 1:

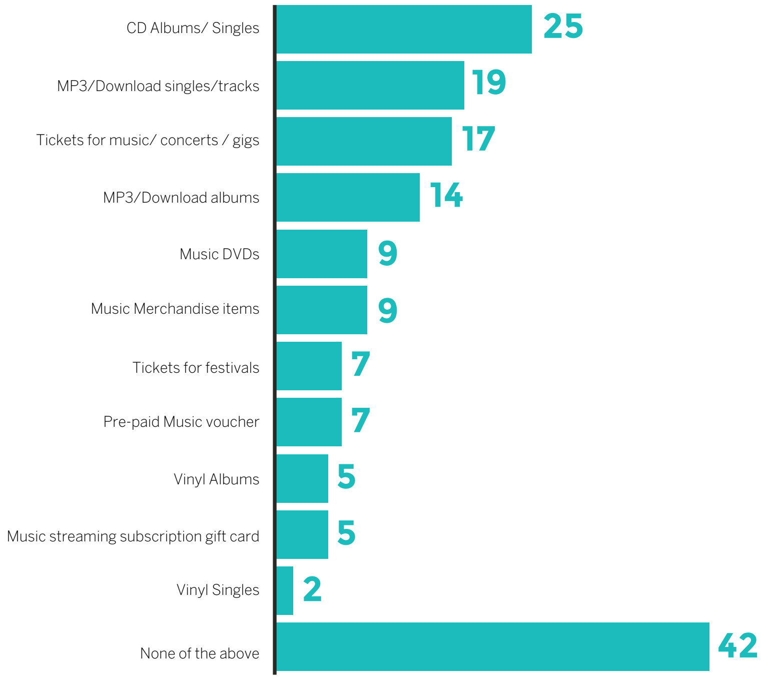
Live Music Purchasing

DEFINITIONS: PURCHASING

Tickets to concerts/gigs were the third most purchased music products at 17%, while 7% purchased a ticket to at least one festival.

All respondents were asked which, if any, music-related products they had purchased over the past 6 months.

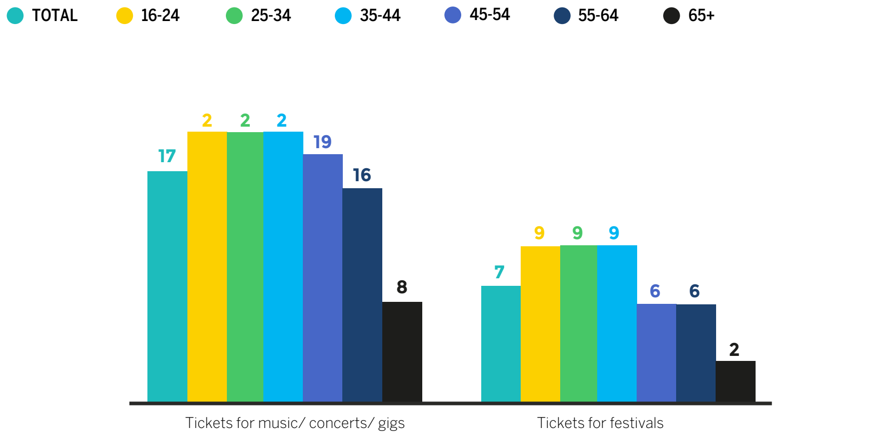
Over half of the sample (58%) had purchased or been given a music related product over the past 6 months.



Base: 3,006 Respondents

1 in 5 16-44 year olds had purchased a ticket to a music concert/gig over the past 6 months.

Ticket purchasing, for both music concerts/gigs and festivals, peaked among those aged between 16 – 44, before dropping within the older age groups.

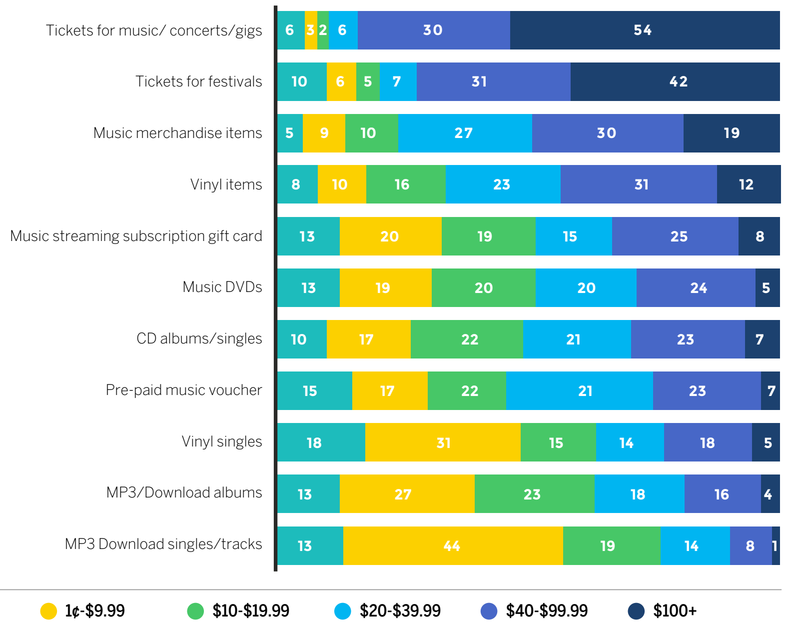


Base: 3,006 Respondents

TOTAL SPENDING

Expectantly, spending increased the more expensive the product.

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 .



Question: Roughly how much have you personally spent on the following in the past 6 months?
Base: Various – those who bought each product

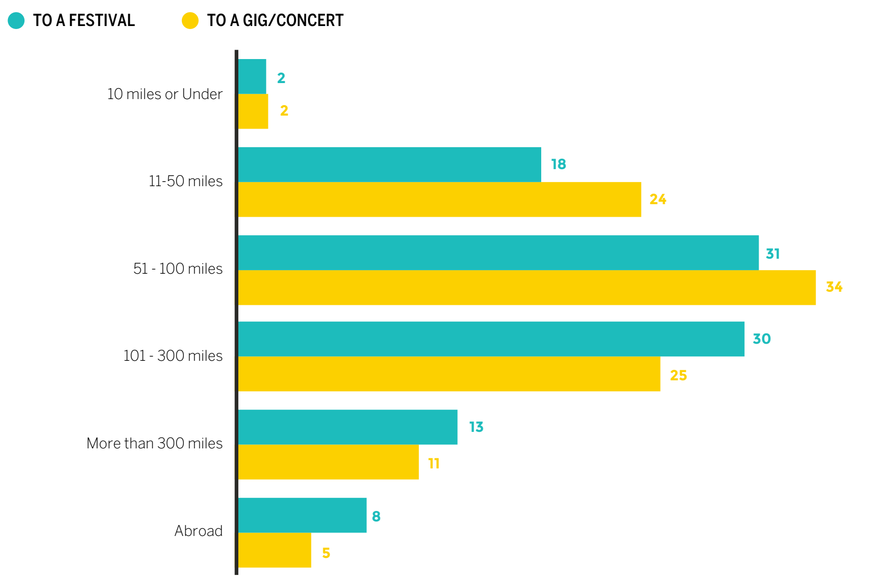
DISTANCE WILLING TO TRAVEL

Festival and music gig/concert ticket purchasers were then asked how far they were willing to travel to attend their chosen event.

Over half of festival ticket purchasers (51%) were willing to travel over 100 miles to attend their chosen festival. Of this, a fifth (21%) were willing to travel over 300 miles.

By comparison, gig/concert ticket attendees were less willing to travel long distances, with 40% travelling over 100 miles.

LIVE MUSIC ATTENDEES (%)



Question: In general. How far are you willing to travel to attend a music concert /gig? In general, how far are you willing to travel to attend a music festival? | **Base:** 522 Concert/gig attendees. 205 festival attendees

SECTION 2:

Live Music Attendees

ATTENDEES ARE HEAVILY ENGAGED

Live music attendees, to both gigs/concerts and festivals, were considerably more engaged with music than the national population, over-indexing on agreement with each of the tested statements.

Here respondents were asked whether they agree or disagree with a range a statements relating to the role music plays in their lives. These were then used to determine the level of engagement each respondent had with music.

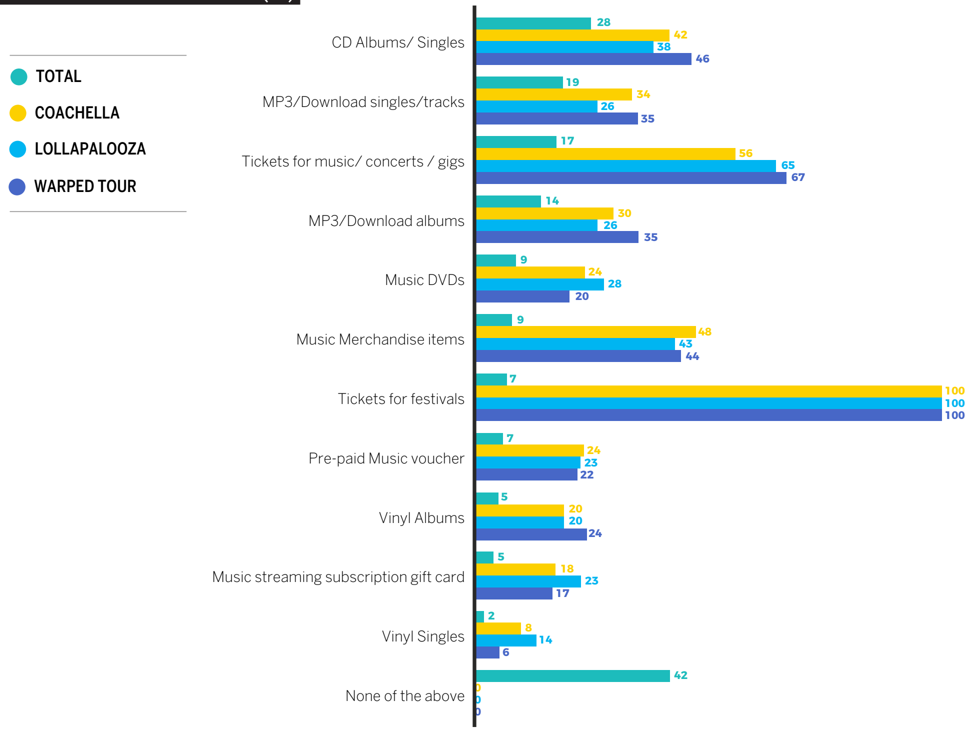
	Total	Gig Goers	Festival Goers
MY FRIENDS OFTEN ASK ME ABOUT NEW MUSIC	27%	41%	47%
MUSIC IS CENTRAL TO MY LIFE	40%	58%	53%
I KNOW MORE ABOUT MUSIC THAN MOST PEOPLE I KNOW	31%	47%	55%
MUSIC IS MY FAVORITE KIND OF ENTERTAINMENT	38%	50%	49%
I ACTIVELY SEARCH FOR NEW MUSIC	35%	50%	49%

AND THEY ARE HEAVY MUSIC PURCHASERS

Reflective of their higher engagement with music, festival attendee segments were more likely to have purchased a music related product.

Particularly popular items included tickets for music/concerts/gigs (between 50%-70%), Music Merchandise (between 40%-50%) and Vinyl Albums (around 20%).

MUSIC PRODUCT PURCHASING (%)



Question: Which of the following music products have you acquired for yourself in the past 6 months?
Base: 3,006 Respondents

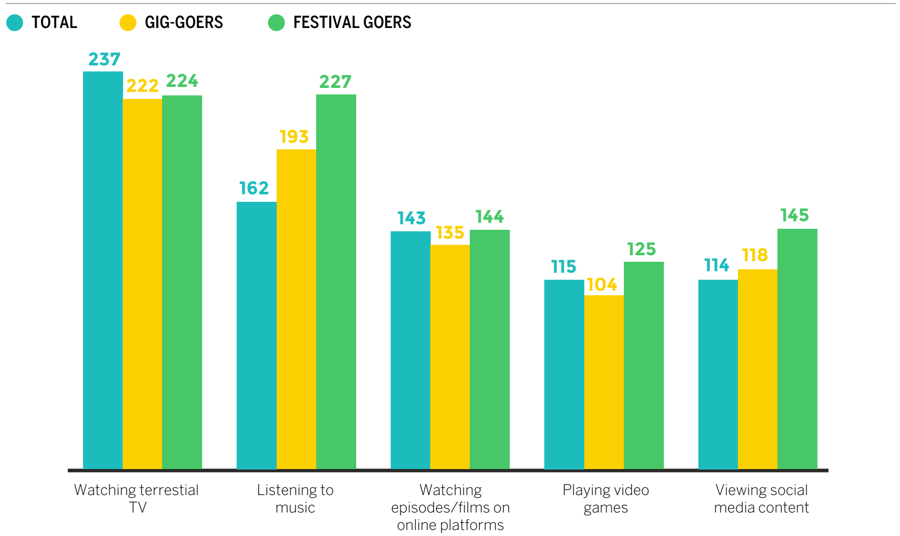
FESTIVAL GOERS ARE MEDIA HUNGRY

Respondents who carried out each 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.

Both gig and festival attendees spend longer listening to music than the average American. While the average American listens to music for an average 162 minutes a day, gig/concert attendees listened for 192 minutes and festival attendees listened for 227 minutes, both significant over-indexes.

With the exception of 'terrestrial' television, festival attendees spent longer consuming all media types in a typical day. Over-indexing on time spent watching episodes/films on online video platforms, playing video games and v viewing social media content.

AVERAGE TIME SPENT ON EACH ACTIVITY (%)



All those who carry out each activity in a 'typical' day
Base: 2,968 Respondents

ATTENDEES ARE BIG LISTENERS

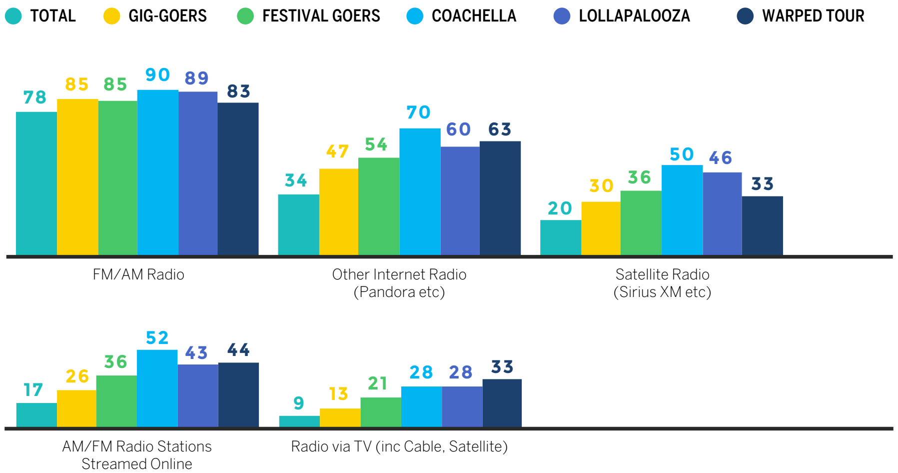
Given their aforementioned increased engagement with music, gig and festival attendees were more likely to listen to each radio format, over a weekly period*, than the national population.

'Weekly reach' can be defined as: used at least once, for five minutes or more, over a weekly period.

Key stand-outs were AM/FM Radio stations streamed online and other internet radio (Pandora etc.), where over-indexes were the most prominent.

In terms of individual attendee segments, Coachella attendants were the heaviest users, recording the peak usage levels across all radio formats, except Radio via TV, where Warped Tour attendees reined.

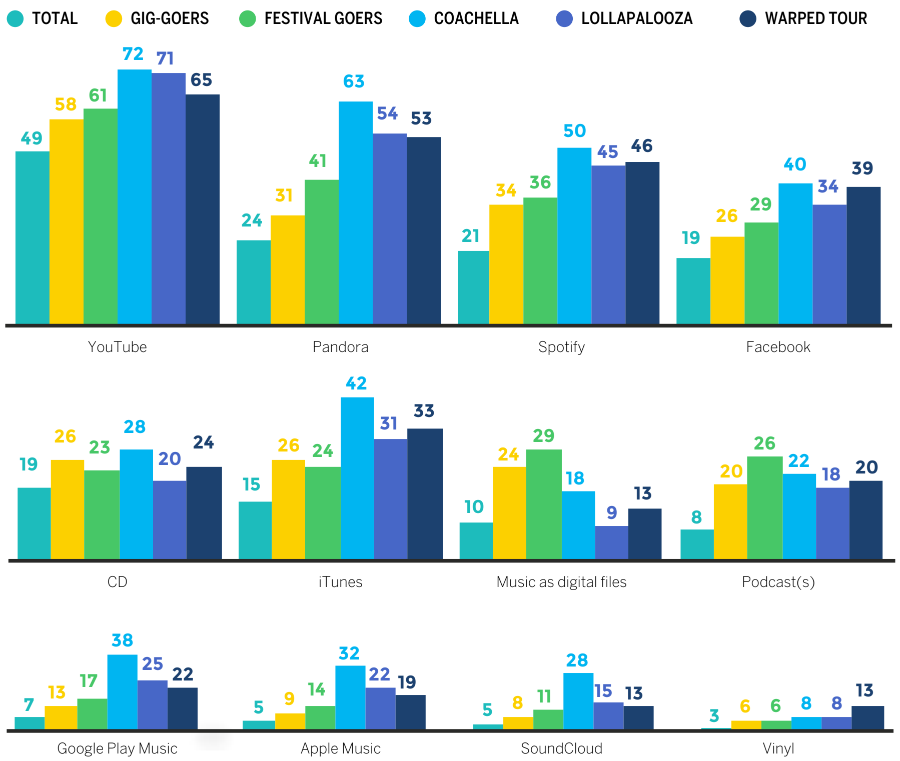
WEEKLY REACH (%)



Question: 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:** 3,006 Respondents

Again, given their aforementioned increased engagement with music, attendees were more likely to listen to online platforms, than the average American.

YouTube, Spotify, iTunes and Podcast(s) recorded the most significant over-indexes amongst both gig-goers and festival-goers, as well as Pandora amongst latter segment. Although wider gig-goers and festival-goers recorded higher usage levels of digital files, usage dropped amongst the individual segments (Coachella, Lollapalooza etc.). Here, Coachella attendees were again the heaviest users, with their usage peaking across most platforms. The exception being Vinyl, which was particularly popular amongst Warped Tour attendees (13% vs 3%).



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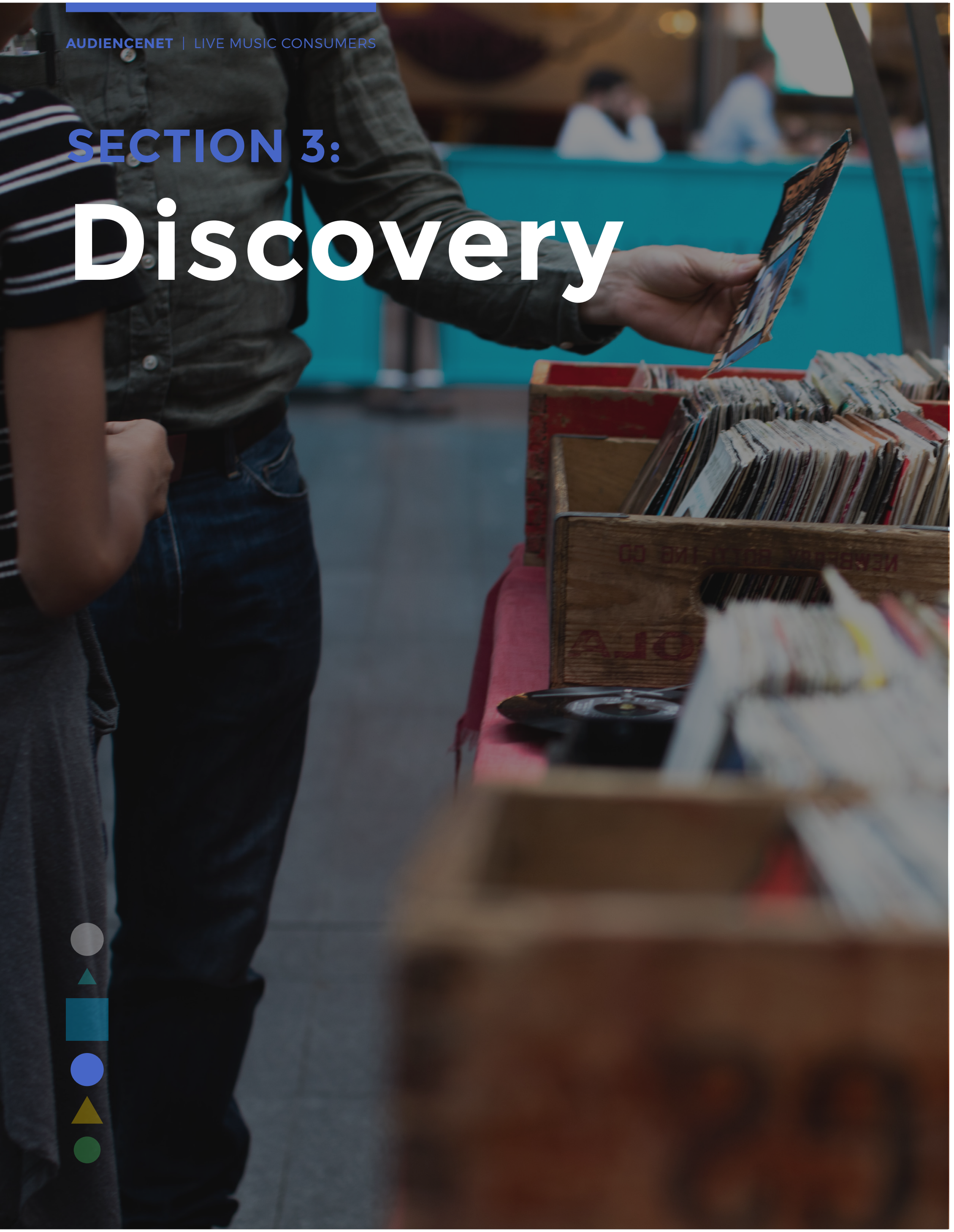


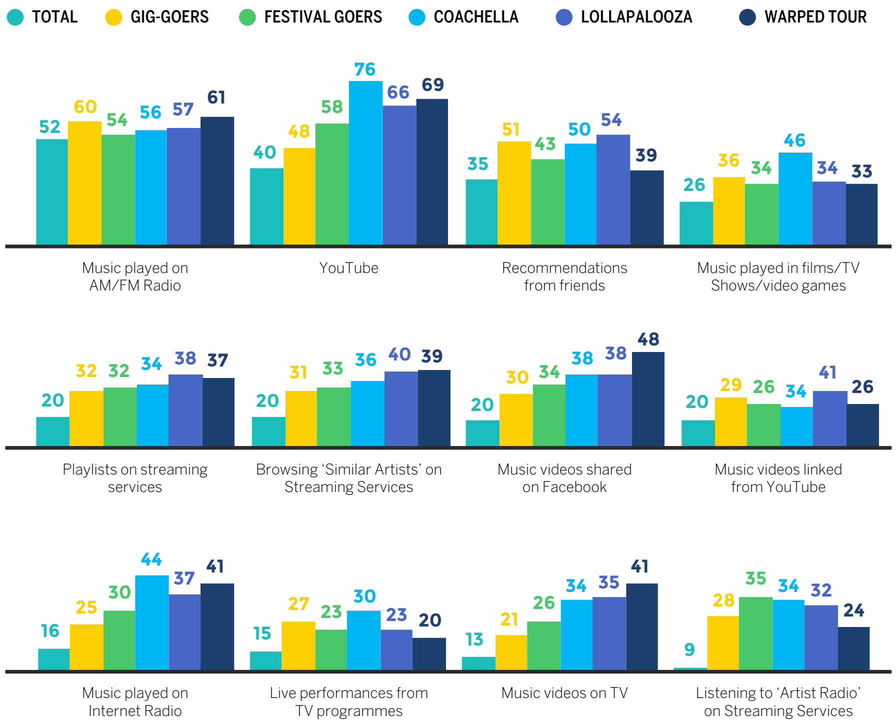
SECTION 3: Discovery

AND BIG MUSIC EXPLORERS

Attendees discovered more music through all tested channels that the national population, especially digital platforms.

As more active music consumers, attendees naturally discovered more music through each listening method than the national average. Digital discovery methods particularly stood out, such as YouTube, and features on streaming services, such as: 'Artist Radio', playlists, and browsing 'Similar Artists'. ecommendations from friends and live performances were also key stand outs amongst gig-goers.

MUSIC DISCOVERY METHODS (%)



Question: How do you typically discover music?
Base: 3,006 Respondents

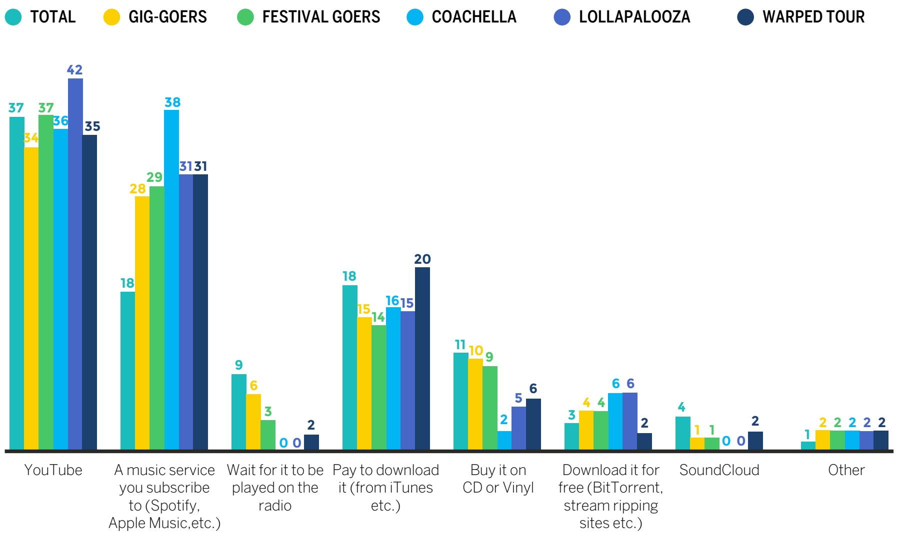
'GO TO' SOURCE POST DISCOVERY

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.

Given engagement with music was high among event attendees, it has so far been difficult to determine their main source of music listening, given they over-index on most, if not all, radio and online sources. Here however, as respondents were allowed to choose only one method of consumption, they were forced to weigh each method against one another, thus revealing their utmost preferred source.

Among attendee segments, a music service a respondent had subscribed to (Spotify, Apple Music, Deezer etc.) was the clear winner here, recording the most significant over-indexes of the options tested (between 28%-38% compared to 18% amongst the national population).

'GO TO' SOURCES POST DISCOVERY (%)



Question: 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: 3,006 Respondents

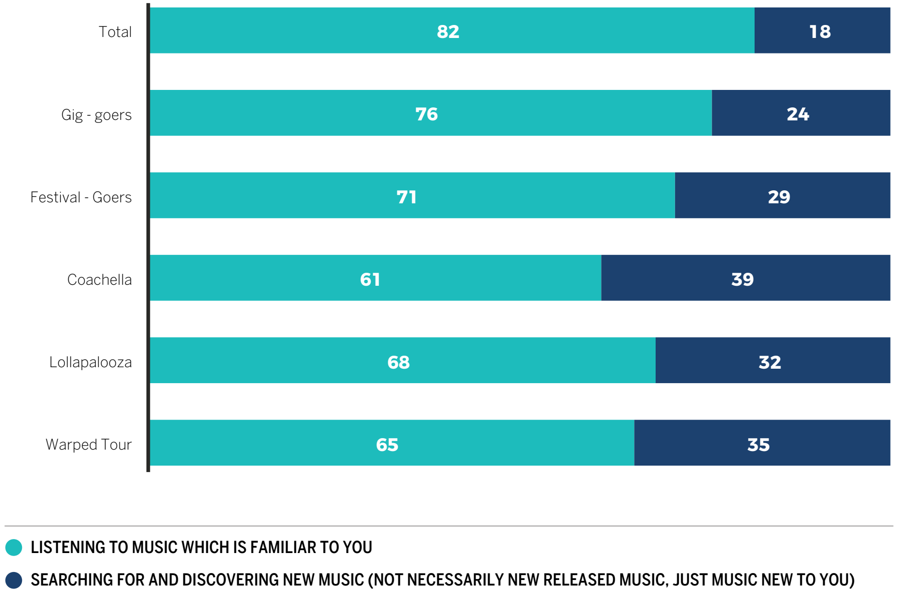
ATTENDEES MORE LIKELY TO SEARCH FOR NEW MUSIC

Respondents were asked how they split their listening time between listening to music familiar to them, or searching and discovering new music.

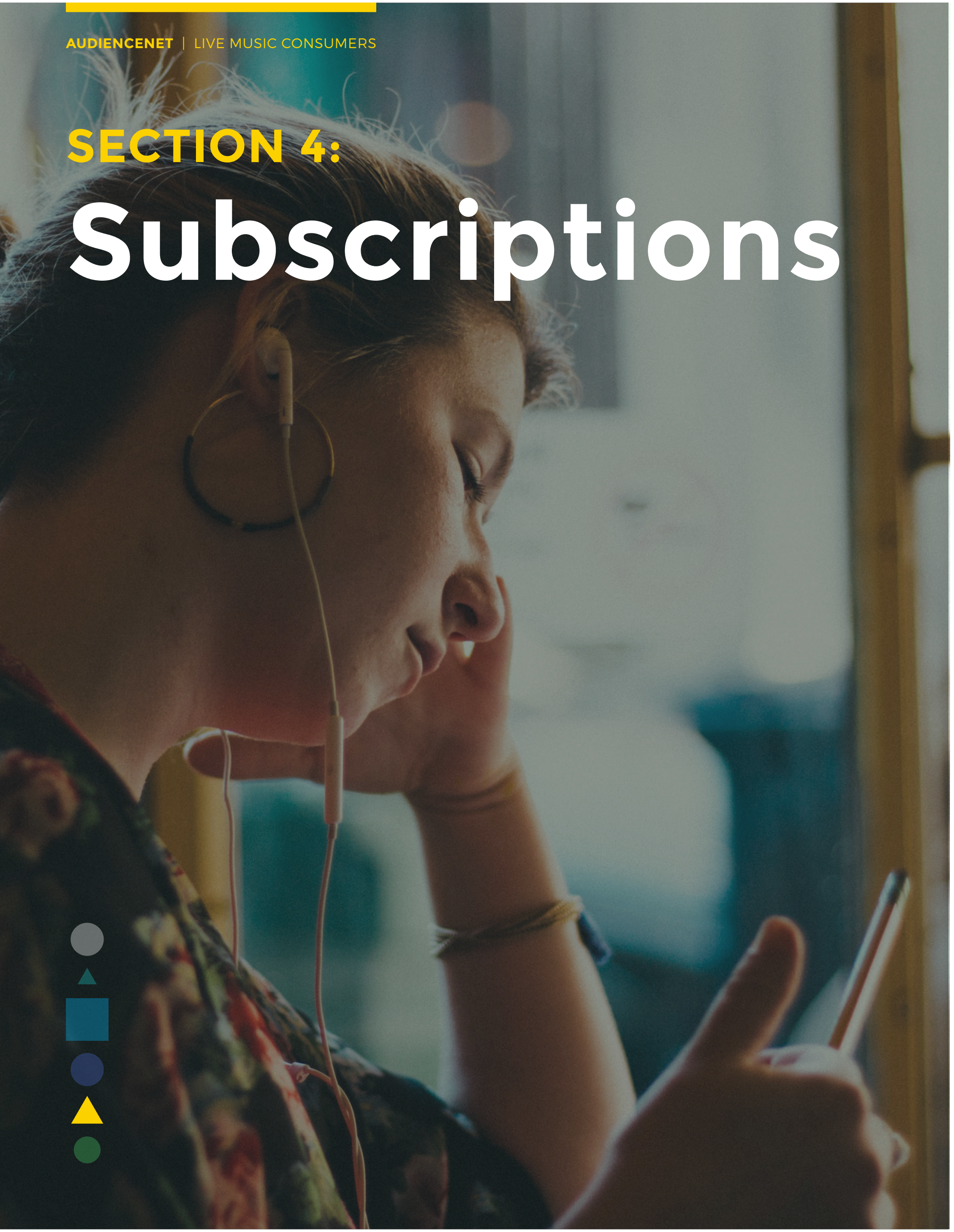
All attendee segments spent around or over a quarter of their listening time searching for a discovering new music, again reflective of their engagement with the media form.

Of the individual attendee segments, Coachella attendees with the most likely to seek out new music at 39%.

FAMILIAR MUSIC VS DISCOVERING SOMETHING NEW (%)



Question: How is your music listening split between the following?
Base: 3,006 Respondents



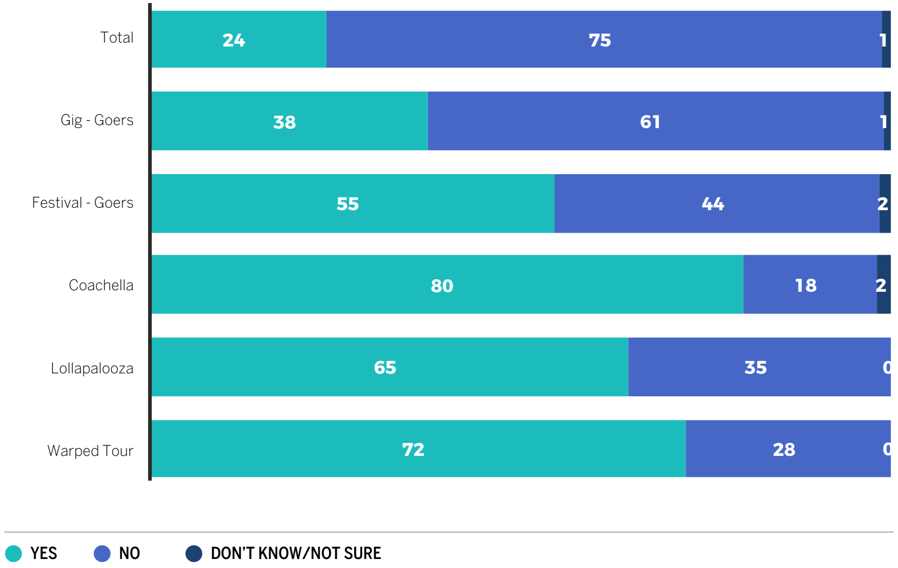
SECTION 4: Subscriptions

AND ARE MORE LIKELY TO BE PAID SUBSCRIBERS

Attendees were much more likely to have a paid subscription to a music streaming service than the average American. Over a third of gig-goers (38%), and over a half of festival-goers (55%), stated they paid for a subscription, both significant over-indexes, which are again reflective of their increased engagement with music.

Out of the individual festival attendees, Coachella attendants were the most likely to pay for streaming at 80%. Followed by Warped Tour attendants (72%) and Lollapalooza attendants (65%).

PAID SUBSCRIPTION UPTAKE (%)



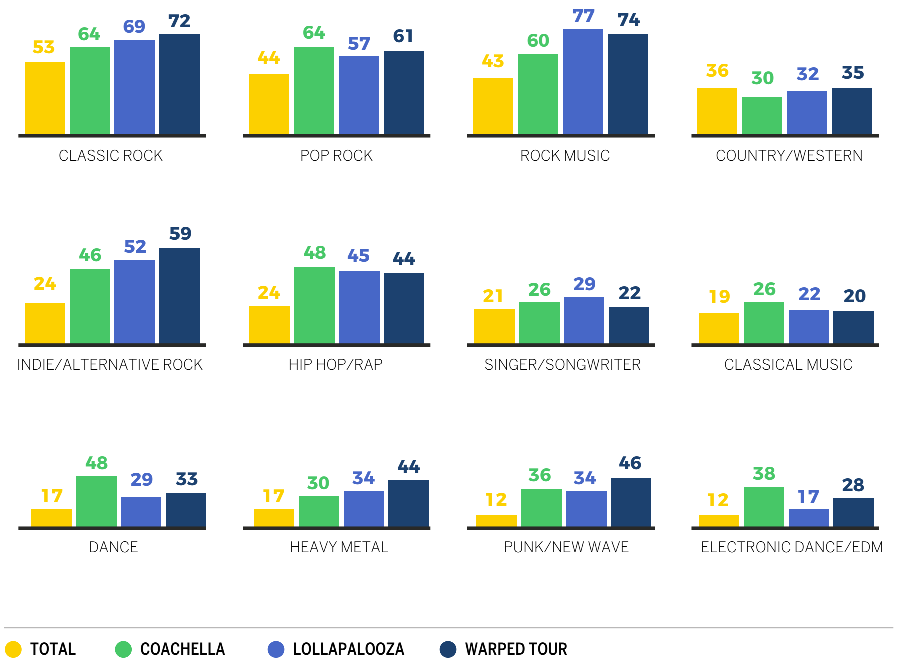
Question: Do you pay for a premium subscription to a music streaming service?
Base: 3,006 Respondents

SECTION 5:
Genres

TOP GENRES

With the exception of country/western, all live music attendees over-indexed on liking each of the tested genres.

Key standouts for Coachella attendants were Pop, Hip-Hop/Rap, Dance and EDM. Lollpalooza fans preferred Rock and Singer/Songwriter, whist Warped Tour attendants favored Classic Rock, Indie/Alternative, Heavy Metal and Punk/New Wave.



Question: Which of the following types of music do you generally like?
Base: 3,006 Respondents

Festival Sponsorship

80%

of US millennials state that brand sponsorship enhances the festival experience

36%

state that brand sponsorship enhances the festival experience to a great extent

CHOSEN BRANDS

- Apple
- Google
- Starbucks
- Amazon
- Coca-Cola
- Dominos
- Walt Disney
- Gatorade
- McDonalds
- Nike
- Target
- Playstation
- Walmart
- Xbox
- Nintendo

Artist Clusters & Brands

Coldplay
Arctic Monkeys
Daft Punk
Imagine Dragons
Bastille

Google
Nintendo
TARGET

Taylor Swift
Beyoncé
Iggy Azalea
Katy Perry
Lorde
One Direction

Disney

Rihanna
Jay Z
Kanye West
Drake
Eminem

NIKE
GATORADE

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