

CONSUMPTION BY GENRE

How Different Fans Consume Music

2018



AUDIO[▲]MONITOR_▼

AUDIENCE NET

01 SAMPLE



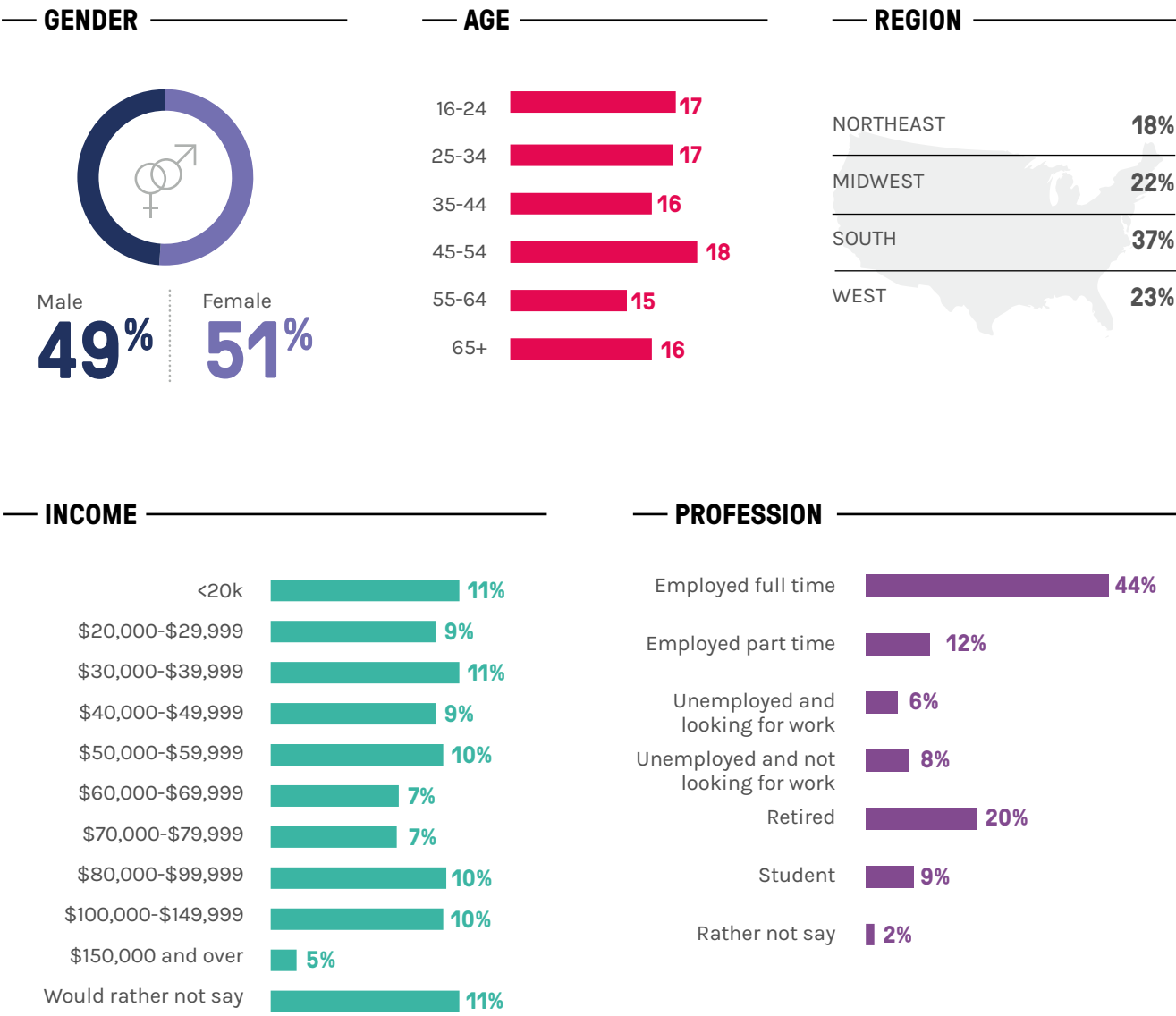
SAMPLE

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

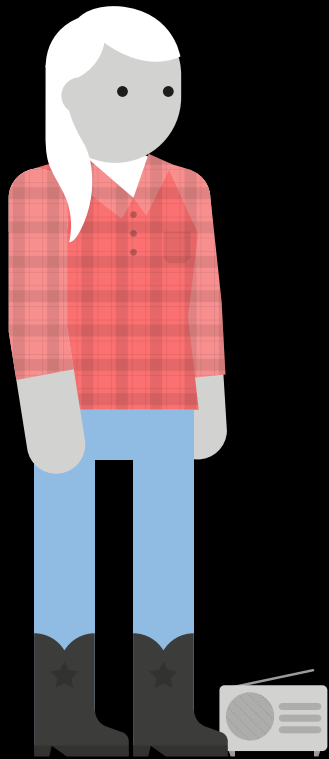
To guarantee national representation, quotas were set for: Gender, Age and Geographic Region, in accordance with the 2010 US census. All participants had online access.

Fieldwork was completed in July 2018. The demographic profile of those surveyed was as follows:

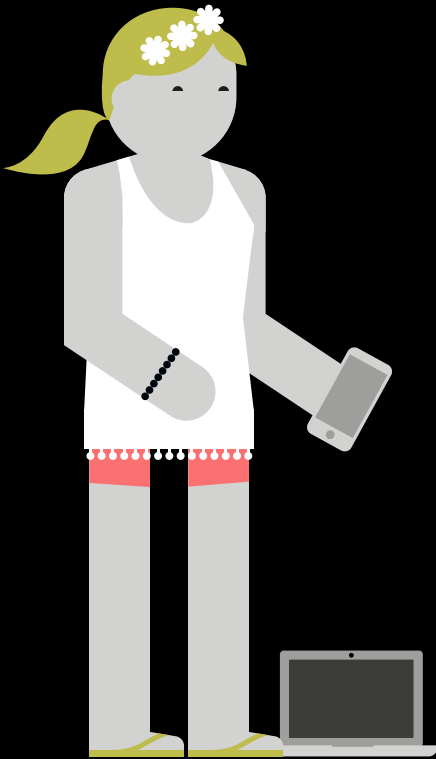
3,000 RESPONDENTS



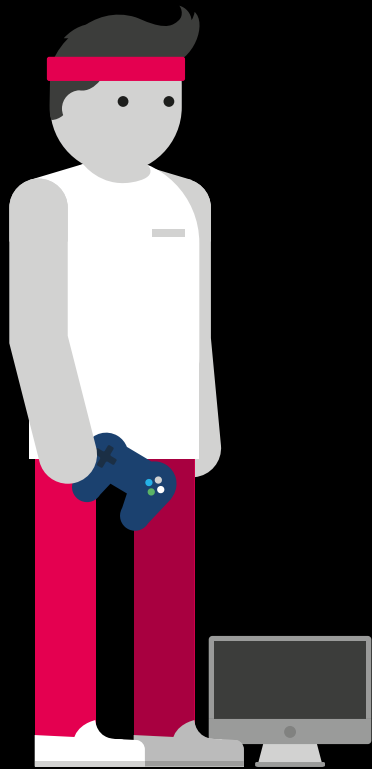
PERSONAS



MARY-ANN
COUNTRY FAN



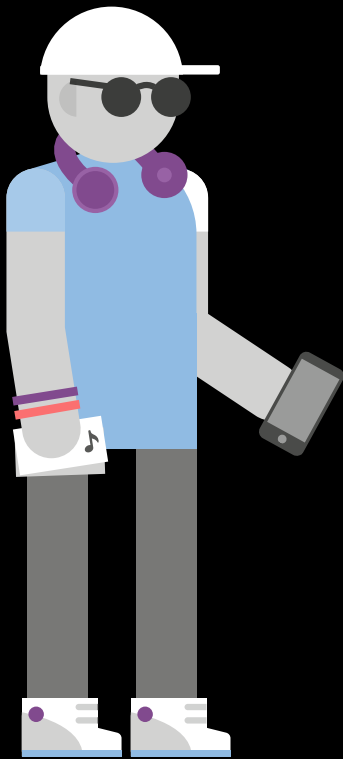
JESSICA
POP FAN



BRAD
DANCE FAN



OZZY
CLASSIC ROCK FAN



CAMERON
HIP-HOP/RAP FAN

GENDER	Female	Female
AGE	45+	16-34
LISTENS TO	FM/AM Radio	On-demand streaming & FM/AM Radio
LISTENS ON	FM/AM Receiver	FM/AM Receiver and Smartphones
SOCIAL PLATFORM	Facebook	Facebook & Twitter

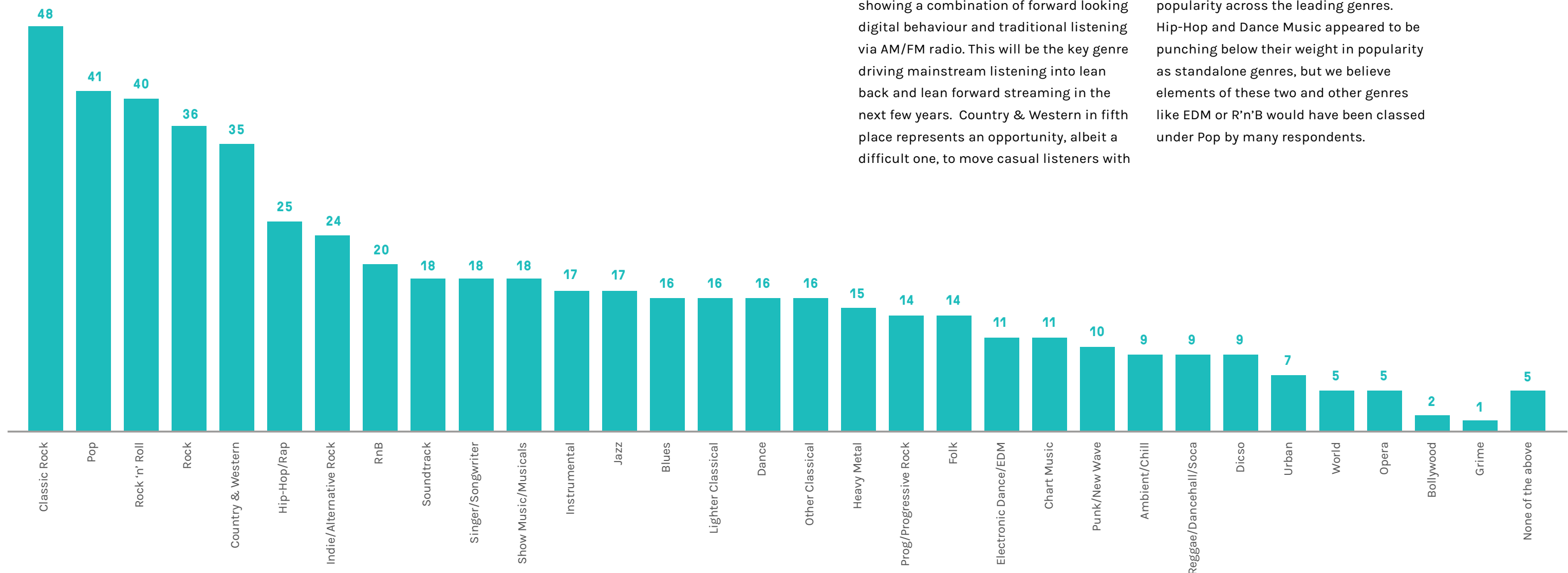
Male	Both	Both
15-34	35+	15-34
Spotify & YouTube	AM/FM Radio	Spotify & Pandora
Laptops & Smartphones	CD Players, standalone & in-car	Smartphones
Snapchat, YouTube & Instagram	Facebook & YouTube	Instagram & YouTube

02 GENRES LIKED



CLASSIC ROCK CONTINUES TO REIGN

Three genres stood out with 40% or more listeners citing them as preferred genres – Classic Rock (48%), Pop (41%) and Rock ‘n’ Roll (40%). Rock (36%) and Country/Western (35%) followed with over a third of the sample also showing preference.

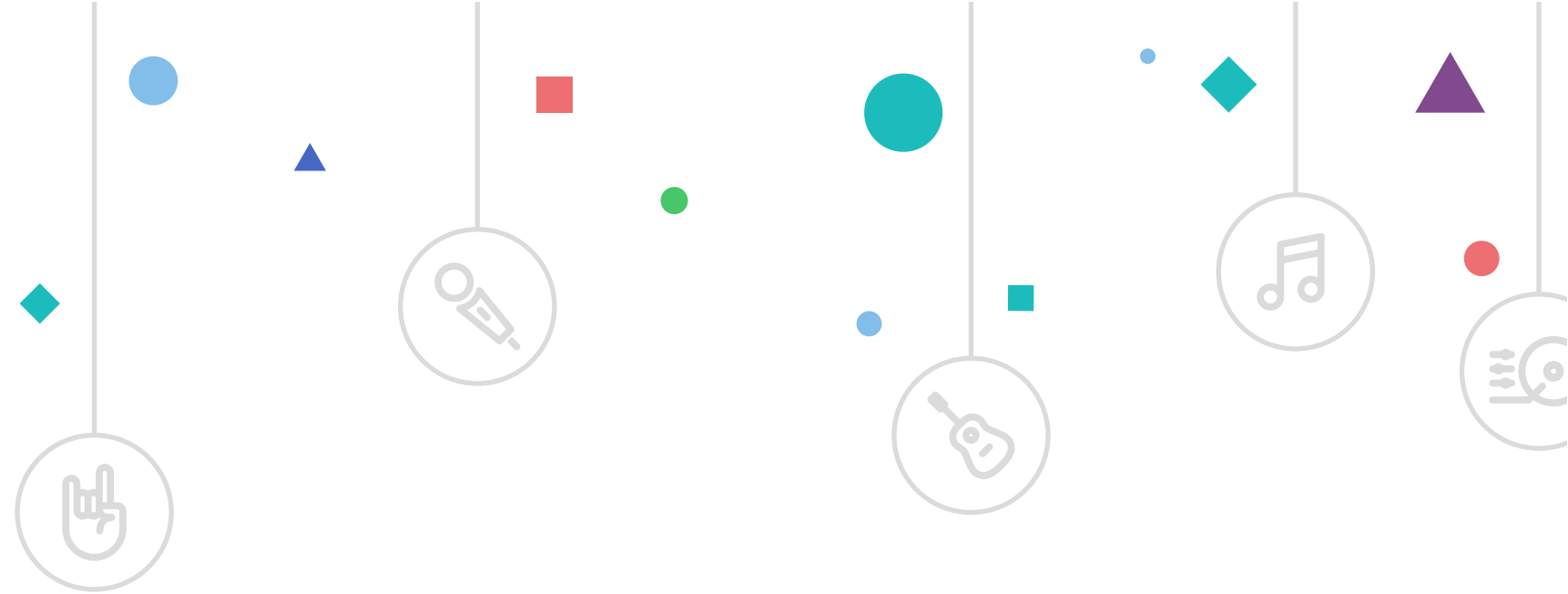


These five represented a broad spread of listeners, with traditional channels like radio playing an important part in listening and driving popularity.

In terms of consumption, Pop Music was the ‘transitional genre’ in second place – skewing younger than it’s top peers – and showing a combination of forward looking digital behaviour and traditional listening via AM/FM radio. This will be the key genre driving mainstream listening into lean back and lean forward streaming in the next few years. Country & Western in fifth 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.



TOP GENRES BY GENDER

Out of the top genres, Females were more likely to say that they enjoy Pop, Country & Western and show music/ musicals.

Males were more likely to select Rock, Classic Rock, and Electronic Dance/EDM.



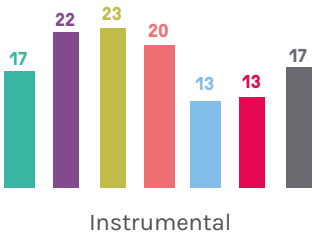
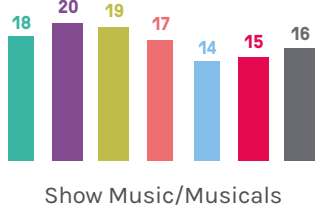
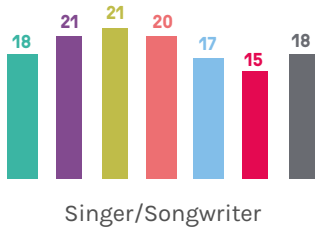
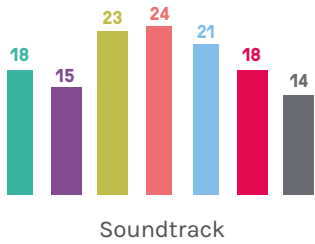
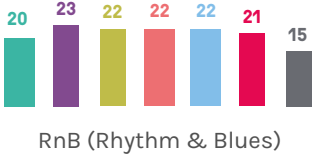
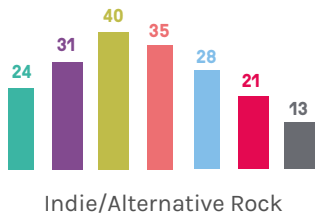
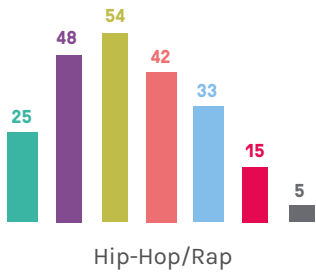
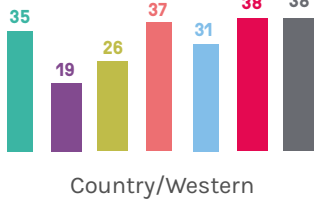
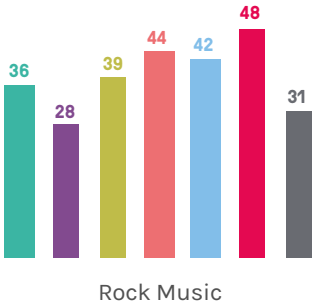
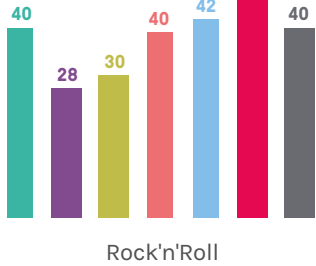
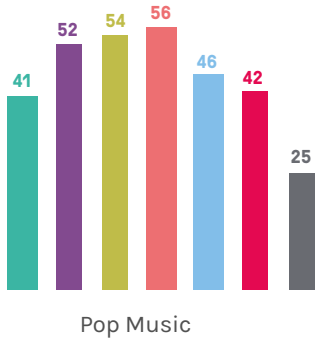
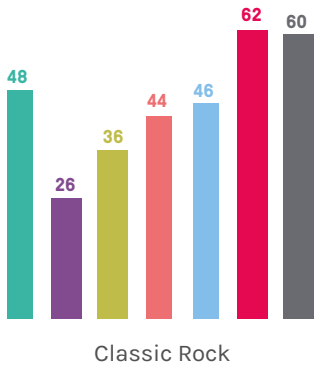
TOP GENRES BY AGE

Classic Rock, Rock, and Rock’n’Roll all skewed older, with preference generally increasing with age.

Pop and Hip-Hop/Rap and Indie/Alternative, by contrast, had a younger bias, with preference peaking among those aged 16-34 before dropping off proportionately with age.

TOP GENRES BY AGE

- Total
- 16-19
- 20-24
- 25-34
- 35-44
- 45-44
- 55-64



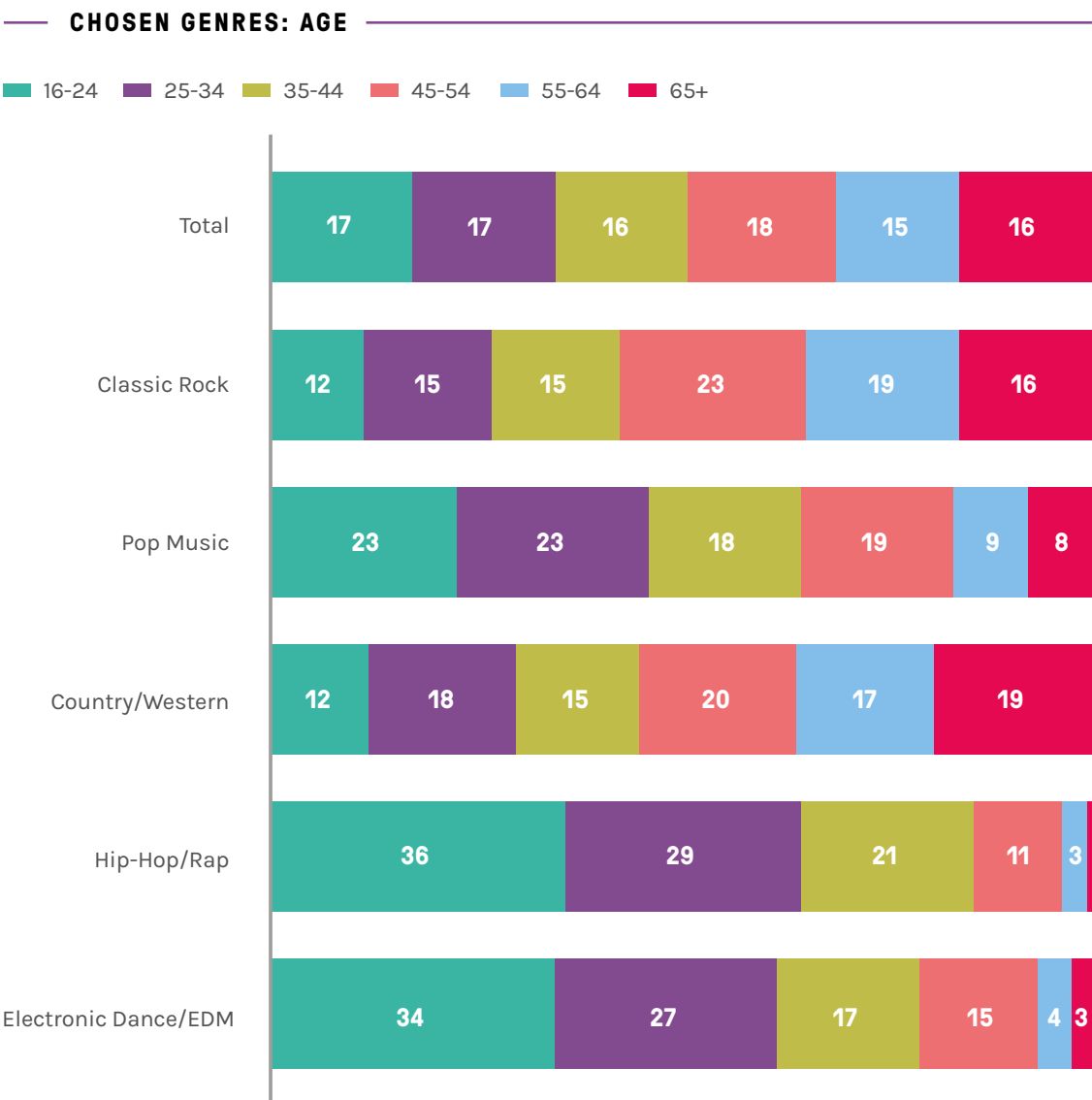
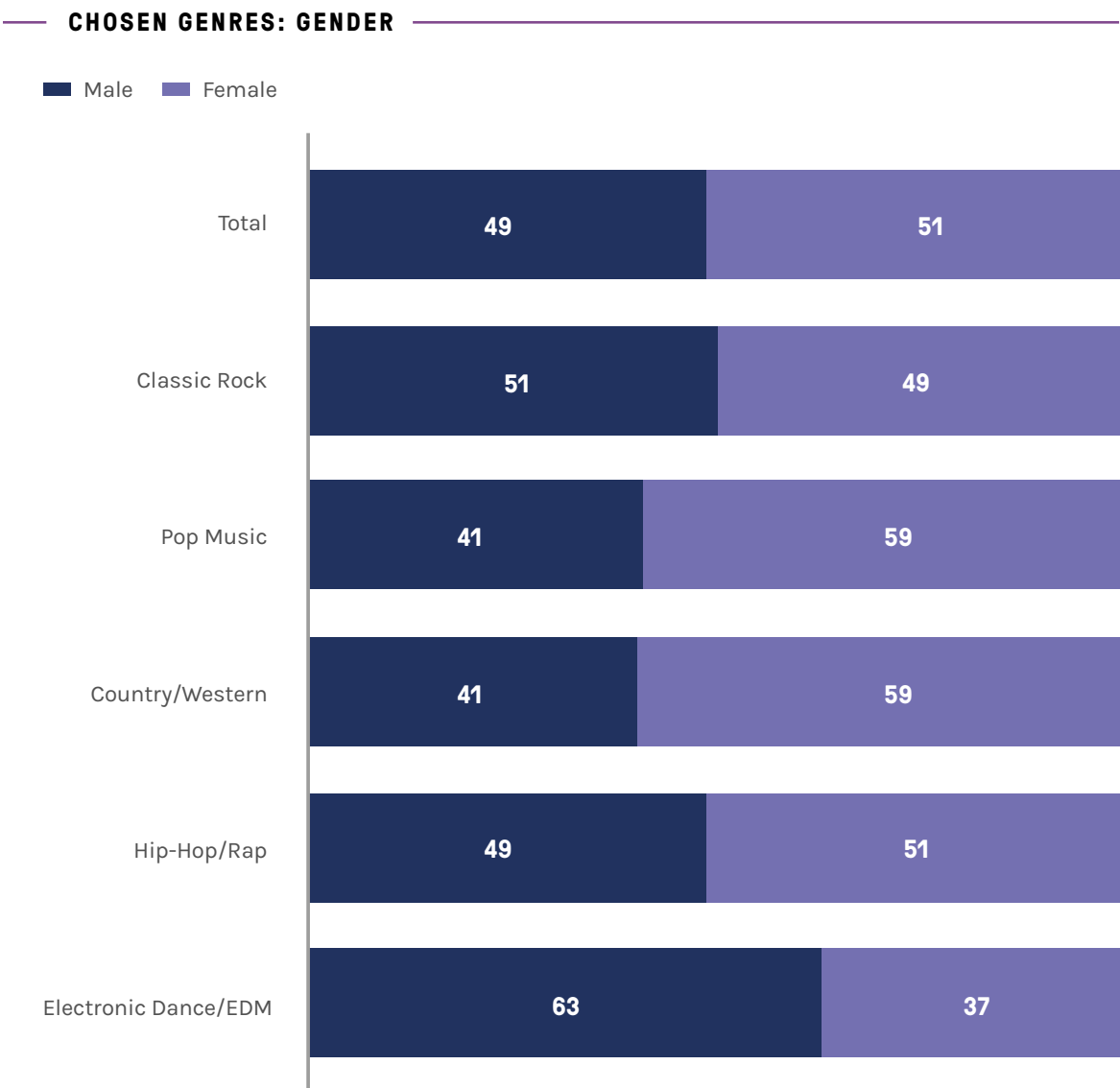
Question: Which of the following types of music do you generally like?

Base: 3,000

CHOSEN GENRES: GENDER & AGE

Both Country/Western and Pop fans skewed Female (59% each) whilst EDM fans skewed heavily male (63%).

The audiences of Pop, Country/Wester and Electronic Dance/EDM skewed young, whilst fans of Classic Rock and Country/Western tended to be over the age of 35.



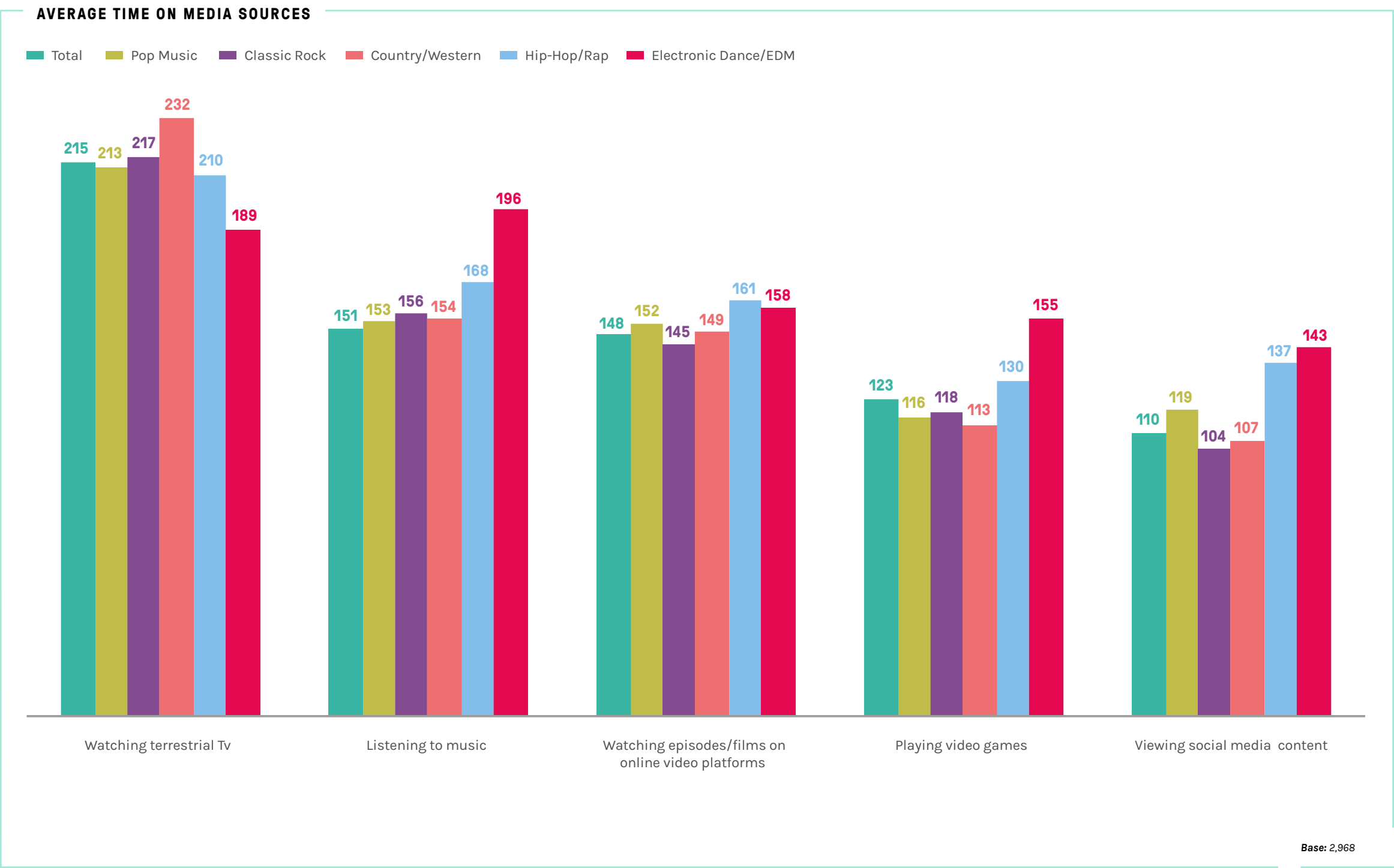
03 CONSUMPTION HABITS



HIP-HOP AND EDM FANS ARE HEAVY DIGITAL CONSUMERS

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.

In terms of listening to music, Hip-Hop/Rap and EDM fans were the most engaged, in comparison to the other fan segments. Hip-Hop/Rap listened for an average of 161 mins a day, whilst EDM fans listened for 196 mins, a significant over-index on the national average of 151 mins.



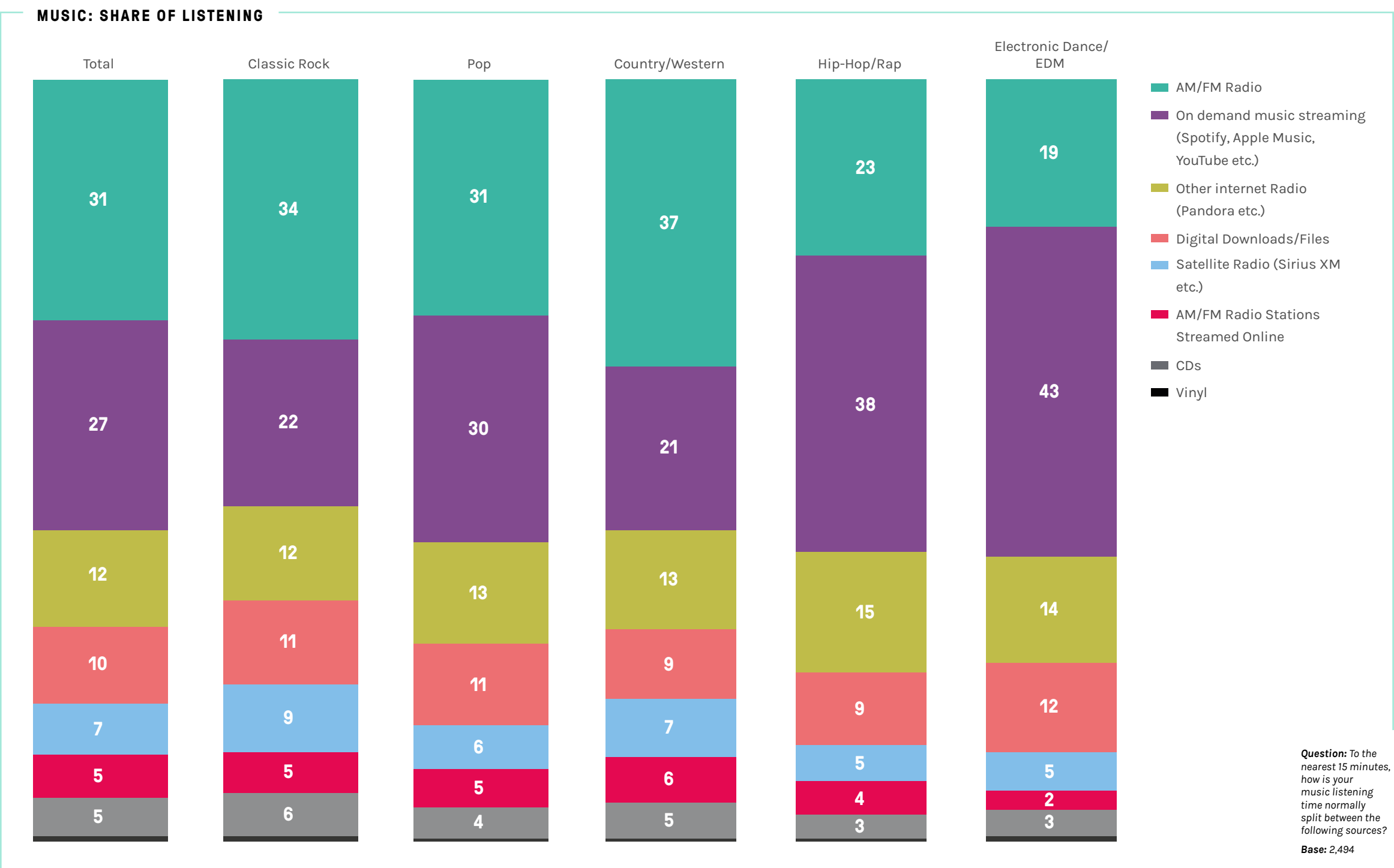
HIP-HOP & EDM FANS ARE EAGER STREAMERS

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

Online platforms accounted for 43% of EDM fan’s listening time, and 38% of Hip-Hop fans’ listening time, whilst the national average was 27%.

Country and Classic Rock fans meanwhile under-indexed at 21% and 22% respectively.

This higher uptake of online services has come at the expense of AM/FM Radio - whilst the format accounted for 31% of the general population listening time, it took a share of just 19% of Dance fans total listening time, and 23% of Hip-Hop fan listening time. Country and Classic Rock fans meanwhile over- indexed on radio listenership at 37% and 34% respectively.

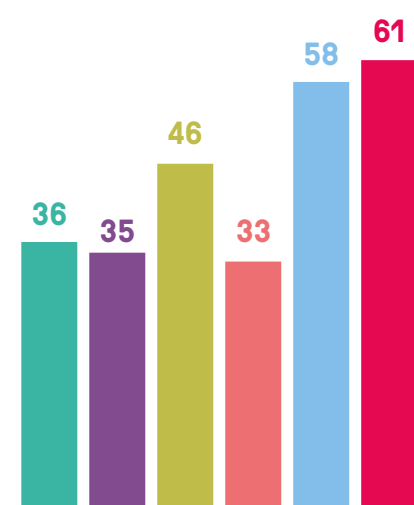


HIGH DIGITAL CONSUMPTION AMONG POP, HIP-HOP & EDM FANS

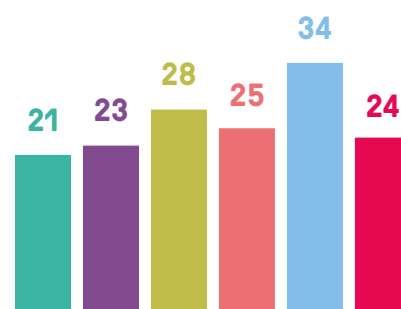
Reflective of their preference for online streaming, Hip-Hop, Pop and Dance fans over-indexed on usage of digital platforms, particularly: YouTube, Pandora, Spotify, iTunes, Facebook, Apple Music and SoundCloud.

PLATFORM REACH

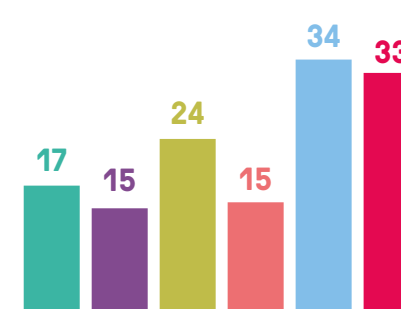
■ Total ■ Pop Music ■ Classic Rock ■ Country/Western ■ Hip-Hop/Rap ■ Electronic Dance/EDM



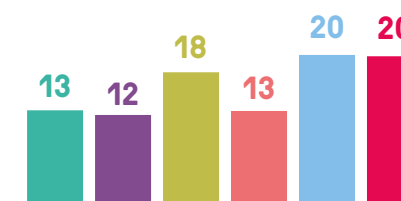
YouTube



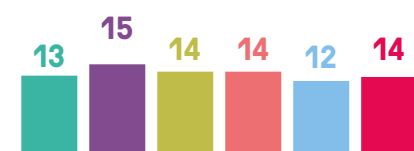
Pandora



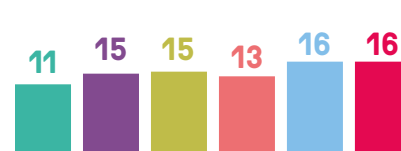
Spotify



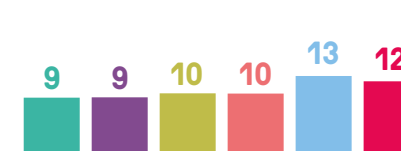
iTunes



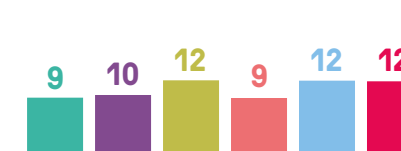
CD



iHeart Radio



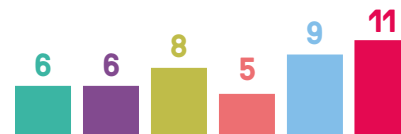
Facebook



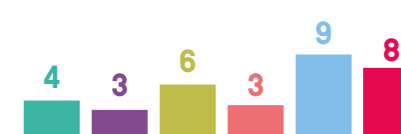
Amazon Prime Music



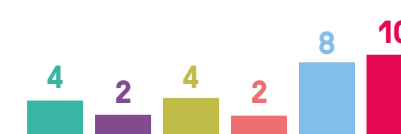
Music as digital files



Podcast(s)



Apple Music
(Streaming music, not iTunes)



Soundcloud/
SoundCloud Go

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: 3,000

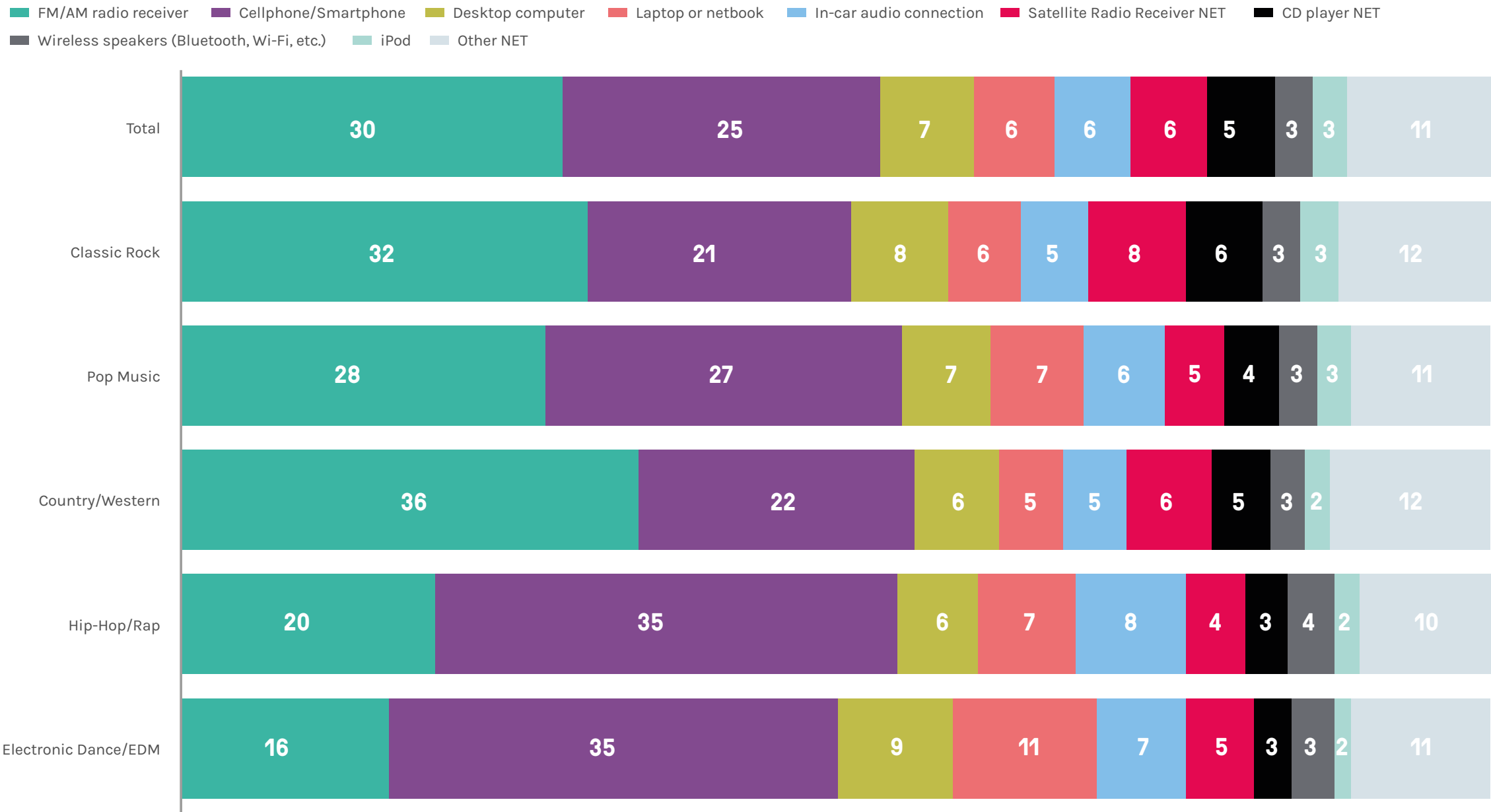
DEVICE LISTENING REFLECTS FORMAT CONSUMPTION

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

Hip-Hop, Pop and Dance fans dedicated most of their listening time to Smartphone/ Cellphones - the device accounted for 35% of both Dance fans’ and Hip-Hop fans’ listening time - whilst the national average was 25%.

Country fans over-indexed on listening to the FM/AM Radio receiver, dedicating 36% of their total listening time to the device (compared to the 30% national average). Simultaneously, Hip-Hop and Dance fans under-indexed on listening to the same device.

SHARE OF LISTENING: TOP DEVICES



Question: To the nearest 15 minutes, how is your music split between the following devices?
*Other NET includes: 'Other', Tablet, Television, Vinyl Player, PlayStation, Voice activated Smart Speaker, Xbox and Smartwatch
Base: 2,494

POP FANS DISCOVER MUSIC THROUGH YOUTUBE AND RADIO

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 (playlists/similar artists etc.), and music videos shared on Facebook recommendations by an artist/celebrity.

TOP MEANS OF DISCOVERY

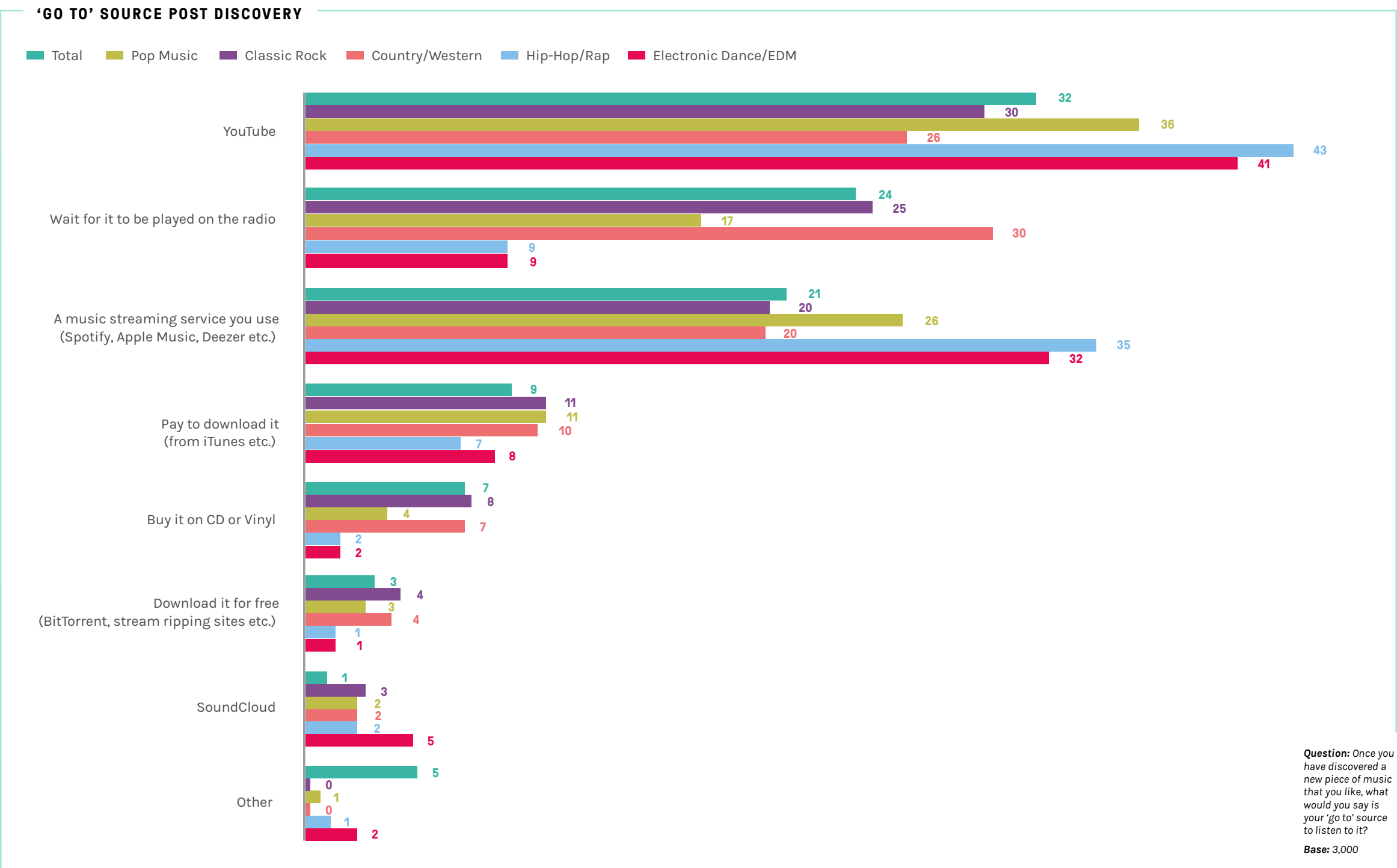


Question: How do you typically discover music?
Base: 3,000

YOUTUBE & STREAMING SERVICES MAIN ‘GO-TO’ SOURCES POST DISCOVERY

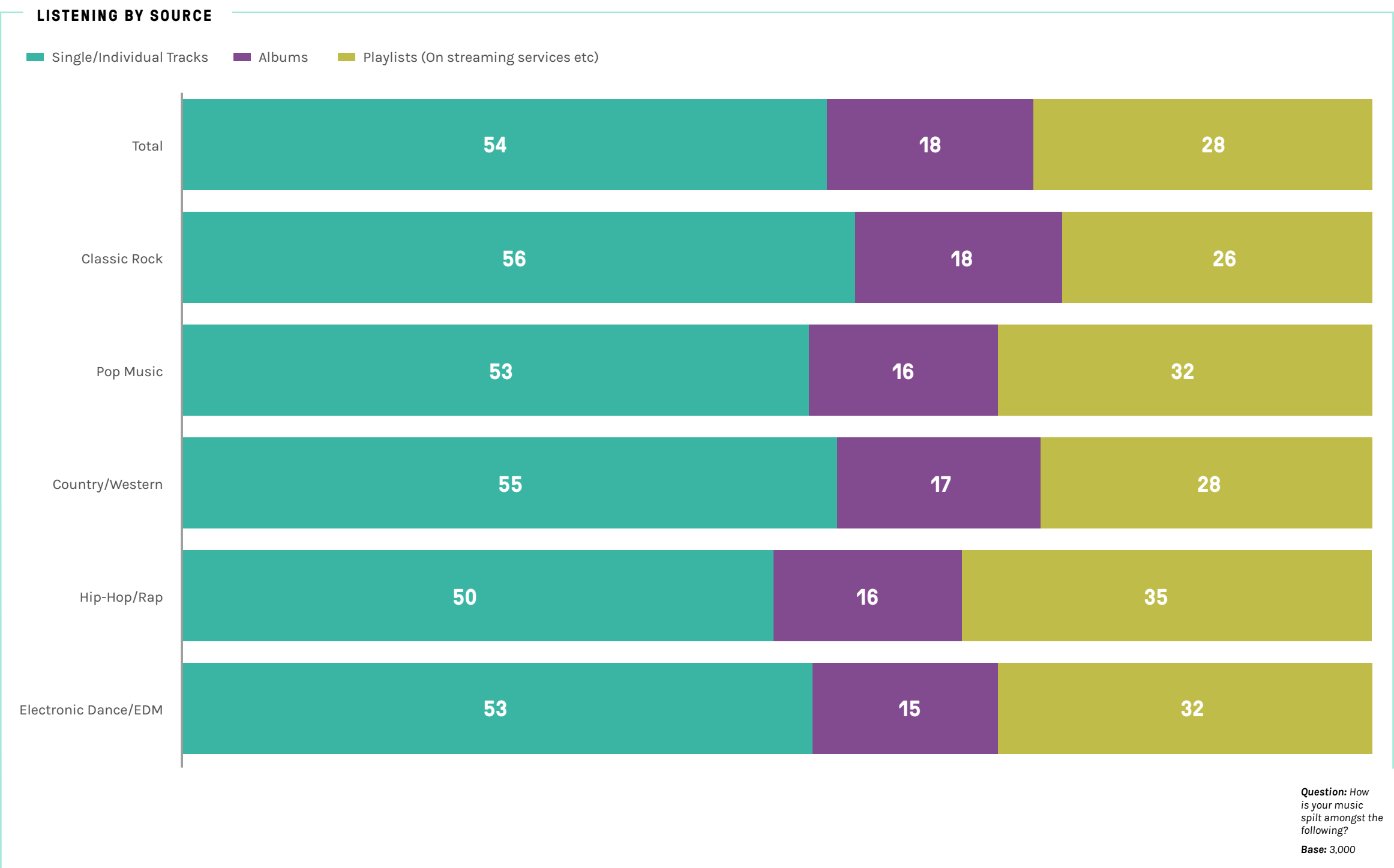
Respondents were then asked, once they had discovered a new piece of music they like, what their ‘go to’ source was to listen to it. Respondents could choose one option only.

Main ‘go to’ post-discovery sources were, tellingly, largely reflective of the overall music consumption habits of different genre fans. Dance and Hip-Hop fans, being more digitally inclined, over indexed significantly on YouTube (41% and 43% respectively) and a music streaming service they subscribe to (32% and 35%). Whereas, Country fans were much more inclined to wait for it to be played on the radio (30% compared to the 24% national average).



SINGLES, ALBUMS OR PLAYLISTS?

Apart from an under-index among Hip-Hop fans, Listening to singles remained similar across the different genre fans. EDM and Hip-Hop fans under-indexed on listening to albums, whilst significantly over-indexing on listening to playlists.

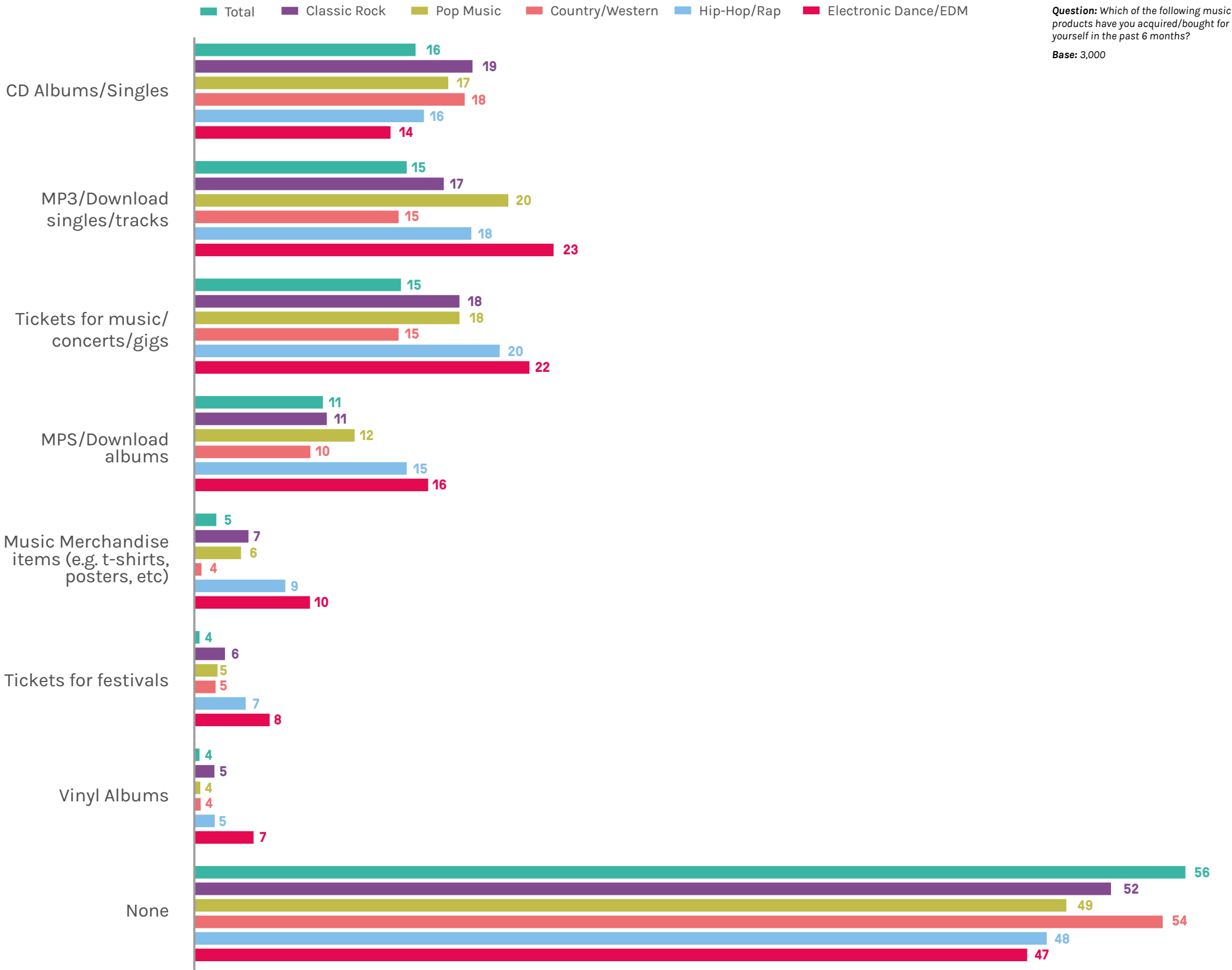


HIP-HOP & EDM FANS ARE BIG SPENDERS

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

Dance fans and Hip-Hop fans bought the most music related products out of the genres tested - whilst 44% of the total sample had purchased a music related product over the past 6 months, 53% of Dance fans and 52% of Hip-Hop fans did the same.

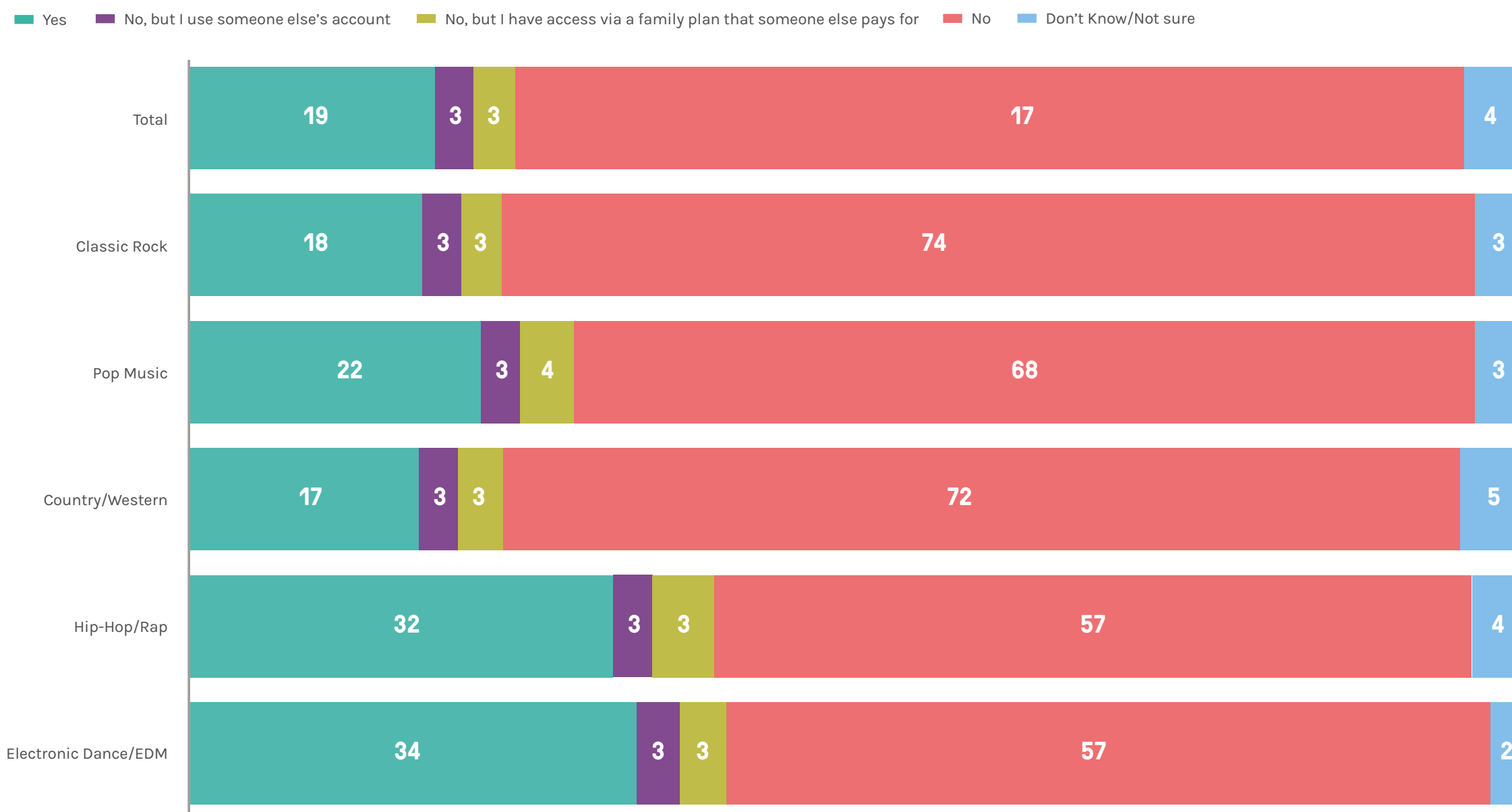
MUSIC SPENDING



A THIRD OF HIP-HOP & EDM FANS HAD A PAID SUBSCRIPTION

Reflective of their higher spend, approximately a third of EDM and Hip-Hop/Rap fans had a paid subscription to a music streaming service. A significant over-index in comparison to the national average (19%).

PAID/PREMIUM MUSIC STREAMING SUBSCRIPTIONS



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

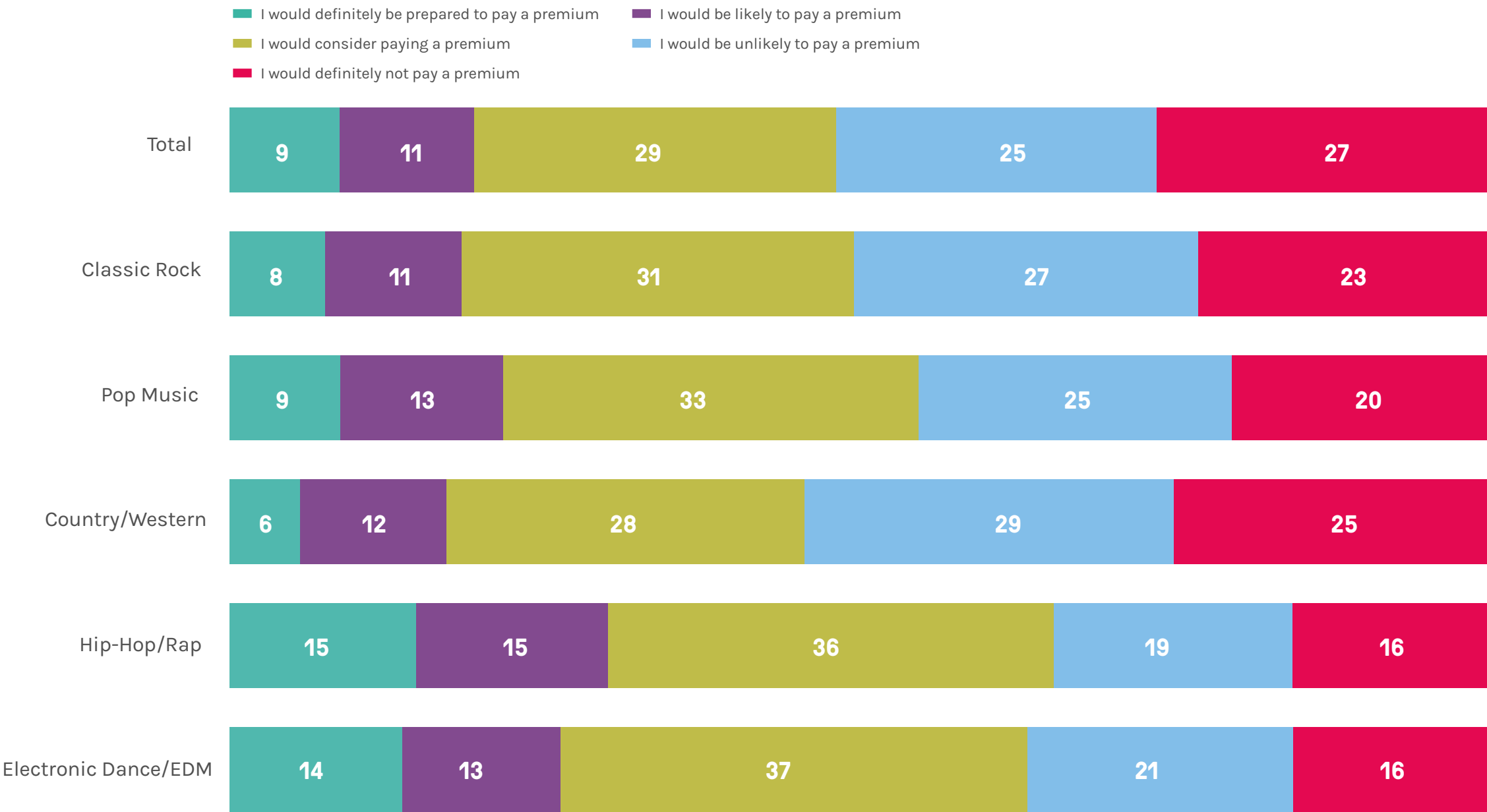
Base: 3,000

CLASSIC ROCK, POP & COUNTRY

FANS UNSURE ABOUT HI-RES

27% of dance fans and 30% of Hip-Hop fans said they would be at least likely to pay a premium for music of a superior sound quality, much higher than the survey average (20%).

LIKELINESS TO PAY FOR HIGH-RESOLUTION AUDIO



Base: 3,000

THANK YOU

For more information on this report, questions or data queries, please contact our Music and Entertainment Research Lead at robert@audiencenet.co.uk

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