This study was conducted during the 2020 COVID-19 pandemic when a large majority of consumers were sheltering-in-place and non-essential businesses were closed.

U.S. Music 360 data was collected June 8th through July 6th, 2020.

Source: https://www.worldometers.info/coronavirus/country/us/
<table>
<thead>
<tr>
<th><strong>STUDY TIMING</strong></th>
<th><strong>DATA COLLECTION</strong></th>
<th><strong>SAMPLE SIZE</strong></th>
<th><strong>QUOTA BALANCING</strong></th>
<th><strong>ADDITIONAL ANALYSIS</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S. Music 360 data was collected <strong>June 8th through July 6th, 2020.</strong></td>
<td><strong>Online surveys using third-party panels</strong> were used to collect responses. The study was available in both <strong>English and Spanish.</strong></td>
<td>Interviews were conducted among a total of <strong>3,790 U.S. Gen Pop (Ages 13+).</strong></td>
<td>Data is <strong>representative of U.S. census population including age, gender, ethnicity, and region.</strong></td>
<td>Please contact us if interested in learning about <strong>additional or custom analyses</strong></td>
</tr>
</tbody>
</table>
## Key Audiences

The following audiences are explored throughout the report. Acculturation is derived from the following factors: years of U.S. residency, dominant language spoken, language of media consumption, and self-identification of culture.

<table>
<thead>
<tr>
<th>GEN POP</th>
<th>TOTAL HISPANICS</th>
<th>LOW ACCULTURATED</th>
<th>BICULTURAL</th>
<th>HIGH ACCULTURATED</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S. General Population (Ages 13+)</td>
<td>Identify as Spanish, Hispanic, or Latinx such as Mexican, Mexican-American, Chicano, Puerto Rican, Cuban, or another Spanish, Hispanic, or Latinx group.</td>
<td>Are more likely to be navigating mainly in their own culture; newer to living in the U.S; speak and consume media mostly in the Spanish language.</td>
<td>Are more likely to be navigating both Hispanic and American cultures; living in the U.S for a number of years; speak and consume media equally in Spanish and English.</td>
<td>Are more likely to be navigating mainly in American culture; living in the U.S for many years; speak and consume media mostly in the English language.</td>
</tr>
<tr>
<td>(N=3790)</td>
<td>(N=1151)</td>
<td>(N=215)</td>
<td>(N=633)</td>
<td>(N=303)</td>
</tr>
</tbody>
</table>
Music is interwoven with cultural identities

66%
(131)
Of Hispanic Music Listeners agree
“Music is tied to my cultural identity and community”

(Index to Music Listeners)

The full report explores how Hispanic consumers across different acculturation levels engage with music today. Contact us to learn more about how much time Hispanic consumers spend on music, most popular devices used for music listening, and the importance of digital outlets (i.e. social media, online video, etc.) to this consumer group.
Immersive, visual engagement is key

The full report explores which music formats (e.g. radio, streaming, CDs, etc.) Hispanic listeners prefer, their engagement with free and premium audio/video music streaming services, key touchpoints for music/artist discovery, and the importance of playlisting.

We take a close look at similarities and differences in music preferences across Hispanic acculturation levels.
Music is an integral part of life’s many moments

<table>
<thead>
<tr>
<th>Occasion</th>
<th>Percentage</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commuting</td>
<td>44%</td>
<td>134</td>
</tr>
<tr>
<td>Party</td>
<td>43%</td>
<td>123</td>
</tr>
<tr>
<td>School/Schoolwork</td>
<td>35%</td>
<td>161</td>
</tr>
</tbody>
</table>

Music is an essential part of everyday life for the Hispanic consumer. Contact us to find out more about which occasions are most popular for music listening, the importance of mood-based playlists, and which genres Hispanics prefer.

The full report includes insights on how COVID-19 has changed the music landscape for this audience.
Hungry for online music content

Of Hispanic Social Media Users engage with **music-related content** on social media

85%

(Index to Social Media Users)

Digital ways of consuming music are top-of-mind for Hispanics. Contact us to find out more about how much time listeners spend watching music through **music videos** and **short clip videos**, the role of **social media** and **short video clip sites** in music engagement, and **top platforms** utilized by Hispanics.

The full report includes which **brand activations** are most likely to resonate with Less Acculturated, Bicultural, and More Acculturated Hispanic audiences.
Big live music buffs, embracing virtual event options

Hispanics are **big live music fans** impacted by event cancellations due to the pandemic. Contact us to learn more about Hispanics' top live music events, preferences around **acceptable solutions** for cancelled events, interest in **digital and live streamed concerts**, and the **willingness to pay** for virtual events.
High Acculturated Hispanics invest big

High Acculturated Hispanic Music Listeners spend +67% more on music than the average Music Listener

The full report dives into differences among Hispanic audiences when it comes to share of dollars across music categories (e.g. streaming services, physical music, digital events, etc.), priorities for selecting music devices, and engagement with streaming music services through paid subscriptions vs. trials vs. using someone else’s account.
Bicultural Hispanics are tuned into what’s up-and-coming

The industry is going through a music and artist discovery renaissance with Hispanic consumers leading the way. Our full report explores topics such as top discovery sources, new release playlist engagement, and the role of entertainment choices in discovery among Hispanic consumers.
For Low Acculturated Hispanics, artists are center stage

Of Low Acculturated Hispanic Music Listeners’ typical monthly music spend goes to artist merchandise

13% (169)

Music artists are at the heart of music engagement for Hispanics.
Contact us to learn more about top-consuming music content online, artist engagement on video sites, attitudes around digital meet-and-greets and other ways of staying connected with their favorite artists.

All insights highlight the role of acculturation on engagement.
Spotlight on the Hispanic Consumer 2020 Report

THIS REPORT EXPLORES THE FOLLOWING KEY AREAS:

- Music Consumption and Preferences
- Music and Artist Discovery
- Technology for Music Listening
- Online Music Streaming
- Social Media & Video Clip Engagement
- Top Genres and year-over-year changes
- Live Music During Pandemic and Beyond
- Virtual Event Acceptance
- Music and Brands
- Comparison Across Acculturation levels

NEED A MORE TAILORED APPROACH?
WE CAN PROVIDE CONTEXTUALIZED ANALYSIS

- Behavior + attitudes of your target consumer
  - By demographic, genre, likely streamers, users of specific social networks and platforms, etc.
- Strategic analysis based on key business issues
- SWOT analysis for your business or competitive set

Contact the Global Music Research Team at data.research@mrcentertainment.com for all inquiries
THANK YOU!

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