U.S. MUSIC 360: Sneak Preview
2021

MRC Data
## METHODOLOGY: U.S. MUSIC 360 2021

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<th>STUDY TIMING</th>
<th>DATA COLLECTION</th>
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<td>U.S. Music 360 data was collected July 12th through July 27th, 2021.</td>
<td>Online surveys using third-party panels were used to collect responses. The study was available in English and Spanish.</td>
<td>Interviews were conducted among a total of 4,041 U.S. Gen Pop (Ages 13+).</td>
<td>Data is representative of the U.S. census population including age, gender, ethnicity, and region.</td>
<td>Please contact us if interested in learning about additional or custom analyses.</td>
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Some data throughout the report was tested for statistical significance at 90% confidence between 2020 and 2021. Data should be read as follows:

In 2020, 72% of the U.S. General Population listened to music. In 2021, 75% of the U.S. General Population listens to music. This represents a 3% growth in Music Listenership and will be denoted like this: \(+3\%\).
INSIGHT CATEGORIES

MUSIC BEHAVIORS & PREFERENCES
- Time spent with music
- Activities engaged with
- Music listening locations/activities
- Music and mood setting
- Industry offerings
- Health and wellness
- Platforms for wellness
- Music listening by format
- Share of music time by formats
- Annual music spend

MUSIC FORMATS
- Physical and digital music purchasing
- Music purchases by generation
- Factors to music format choice
- Vinyl sales growth

MUSIC & ARTIST DISCOVERY
- Music discovery sources
- Discovery sources by generation
- Playlists
- Music discovery intent

GENRE LISTENERSHIP
- Top genres
- Genre listenership by generation
- Consumption growth of top genres

AUDIO & VIDEO STREAMING
- Top music streaming service usage
- Free vs. paid subscriptions
- Paid subscription type
- Streaming service satisfaction
- Barriers to subscribing
- Commencement of paid subscriptions by life stage
- Future subscription opportunity
- Top streaming service features
- Video streaming
### INSIGHT CATEGORIES (Cont.)

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<td>• Barriers to live stream viewership</td>
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MUSIC IS ESSENTIAL TO LIFE...

**MUSIC LISTENERSHIP**
Among Total Respondents

Of Respondents Listen To Music
(Past 12 Months)

75% +3%

**MUSIC AND MOOD**
Among Music Listeners

Music listeners use music to feel...

Happy  Calm  Energetic

(Statistically significant from 2020)
...AND STREAMING TAKES CENTER STAGE

MONTHLY MUSIC FORMAT USE

Among Music Listeners

- Streaming music videos online: 62%
- Streaming audio songs and playlists: 61%
- AM/FM "over the air" radio: 59%

MUSIC DISCOVERY

Among Music Listeners

- Radio (Including AM/FM radio, satellite radio, and online broadcast radio): #1
- Video and/or audio streaming services: #2
- Friends/relatives: #3
MUSIC GOES VISUAL...

TOP STREAMING SITE (BRAND USAGE)
Among Total Respondents

LIVE STREAMING
Among Total Respondents

1-in-20 Have attended a virtual concert / live streamed performance in the past year

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(Statistically significant from 2020)
...AND SOCIAL

SOCIAL SITE USAGE
Among Total Respondents

64% Of Gen Pop engage on social media websites/apps
59% Of Gen Pop stream videos on short video clip sites

TOP GROWTH SOCIAL PLATFORMS
Among Social Media/Short Video Clip Site Users

TikTok
↑ +10%
LIVE MUSIC TO COME BACK...

LIVE MUSIC EVENT ATTENDANCE
Among Total Respondents

14% HAVE ATTENDED A LIVE MUSIC EVENT IN THE PAST YEAR
-7%

16% PLAN TO ATTEND A LIVE MUSIC EVENT IN THE UPCOMING YEAR

(Statistically significant from 2020)
...WITH SUSTAINED VIRTUAL ATTENDANCE

LIVE STREAM EVENT ATTENDANCE
Among Total Respondents

5%
Have attended a virtual concert / live streamed performance in the past year

5%
Plan to attend a virtual concert / live streamed performance in the upcoming year

REASONS FOR NOT WATCHING
Among Non-Live Streamers

I choose to spend my time with other forms of entertainment

I did not want to pay for a virtual concert

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(Statistically significant from 2020)
YOUNG GENS RECYCLE & SET NEW TRENDS

**PHYSICAL MUSIC USE**

*Among Music Listeners*

Gen Z are more likely than the average music listener to have purchased vinyl records in the past year.

**DISCOVERY INTENT**

*Among Music Listeners*

“I am interested in discovering new and emerging artists”

**VIDEO GAMES**

*Among Total Respondents*

- 69% (135) have played video games
  - -5% (Statistically significant from 2020)

(MRC Data U.S. Music 360 2021)
Beyond the topline highlights offered here, the full U.S. Music 360 report explores:

- The music landscape in U.S. among online consumers
- Generational differences on key behaviors
- Key insights around how this audience engages with music, including format preferences, discovery, occasions, time and money spent on music
- Online music streaming usage, including playlisting, subscriptions, and intent to subscribe
- The return of live music events and interaction with live streaming
- Genre preferences
- Role of technology in music listening
- Social media and short video clip usage for music content
- Top brand activations

To purchase the full report or commission an analysis to gain deeper insights into your specific business needs please contact us.