YOUTH AND MUSIC
USAGE, CURATION AND DISCOVERY

DR AUDIENCE RESEARCH 2019
PETER NIEGEL, PETN@DR.DK
RASMUS KIDDE, RAKI@DR.DK
PURPOSE

• How important is music to young Danes?

• What is the infrastructure of usage?

• What affects listener habits and where does this leave radio and DR?
METHOD

Qualitative study – phase 1
- 10 in-depth interviews
- At home
- 15-30 y/o
- Nov.-Dec. 2018

Quantitative study – phase 2
- Survey 1,063 completes
- 15-39 y/o
  - The role of music
  - How do they listen?
  - Curation and music discovery
AGE IS AN IMPORTANT FACTOR

THINK NEW

Young (15-24 y/o)

STILL IN THE GAME

Young adults (25-31 y/o)

Adults (32-39 y/o)
HOW IMPORTANT IS MUSIC TO YOUNG DANES?
THE YOUNGER THEY ARE - THE MORE IMPORTANT MUSIC IS

On a scale from 1 to 10. How important is music to you?

1 – It doesn’t mean anything for me to listen to music
2 3 4 5 6 7 8 9 10 – It means a lot to listen to music
RELATIONS ARE MORE IMPORTANT TO YOUNG PEOPLE

Do you and your friends talk about music?

- We talk/share music in my group of friends
- We don't talk about music

Young (15-24 y/o) - 83%
Young adults (25-31 y/o) - 70%
Adults (32-39 y/o) - 68%
HOW AND WHEN DO YOUNG PEOPLE LISTEN TO MUSIC?
• 94% listened yesterday
• 65% spend +60 minutes listening to music

1. Smartphone with earplugs
2. External speakers (WiFi, Bluetooth etc.)
3. Radio

1. Transport
2. Domestic chores
3. Relaxing

• Music streaming on Spotify is primary use
OPPORTUNITY KNOCKS: MUSIC IN THE EVENING FOR THE YOUNG?

When did you listen to music yesterday?

- **Young (15-24 y/o)**
- **Young adults (25-31 y/o)**
- **Adults (32-39 y/o)**
STREAMING PRIMARY FOR YOUNG, RADIO FOR ADULTS

Tick all the ways you listened to music yesterday

- Young (15-24 y/o)
- Young adults (25-31 y/o)
- Adults (32-39 y/o)

Big diff. between youth and adults

1/3 of the young people listened on YouTube
YOUTUBE IS A MUSIC STREAMING SERVICE!

How do you primary listen to music on YouTube?

- I only listen to the music and do not watch the music videos
- I am actively watching the music videos while I listen to music

---

Young (15-24 y/o): 69% listen to music, 31% watch videos.
Young adults (25-31 y/o): 67% listen to music, 33% watch videos.
Adults (32-39 y/o): 66% listen to music, 34% watch videos.

….. to all ages
8 OUT OF 10 HAVE A PREMIUM ACCOUNT

Do you have a premium account on your primary streaming service?

- No
- Yes, but someone else is paying
- Yes, I pay myself (telefone subscription included)

<table>
<thead>
<tr>
<th>Age Group</th>
<th>No (%)</th>
<th>Yes, but someone else is paying (%)</th>
<th>Yes, I pay myself (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Young (15-24 y/o)</td>
<td>19%</td>
<td>27%</td>
<td>54%</td>
</tr>
<tr>
<td>Young adults (25-31 y/o)</td>
<td>23%</td>
<td>15%</td>
<td>62%</td>
</tr>
<tr>
<td>Adults (32-39 y/o)</td>
<td>20%</td>
<td>13%</td>
<td>67%</td>
</tr>
</tbody>
</table>

- Even the youngest have a premium account!

- Music must be:
  - Easy
  - Accesible
  - and is prioritized
CONVENIENCE RULES THE WORLD

Why do you primary use X compared to other music streaming services?

- Best across devices and units: 34%
- User friendly: 33%
- Largest selection of music: 30%
- Best selection of music: 30%
- Trouble to change: 29%
- Convenience rules: 25%
- Likes music: 23%
- Likes music: 23%
- Hassle free: 20%
- Hassle free: 18%
- Hassle free: 17%
- Hassle free: 14%
- Hassle free: 10%
- Hassle free: 10%
- Hassle free: 4%
- Hassle free: 4%
- Hassle free: 3%

1-5 is convenience
Why do you primarily use X compared to other music streaming services?

- Best across devices and units: 34%
- User friendly: 33%
- Largest selection of music: 30%
- Best selection of music: 30%
- Troublesome to change: 29%
- Inspires me to new music: 25%
- Other: 23%
- 20%
- 18%
- 17%
- 14%
- 10%
- 10%
- 4%
- 4%
- 3%

1-5 is convenience
6th is inspiration
CONVENIENCE RULES THE WORLD

Why do you primarily use X compared to other music streaming services?

- Best across devices and units: 34%
- User friendly: 33%
- Largest selection of music: 30%
- Best selection of music: 30%
- Trouble some to change: 29%
- Inspires me to new music: 25%
- Best sound quality: 23%
- 6th is inspiration: 18%
- 14th: 14%
- 10th: 10%
- 4th: 4%
- 3rd: 3%

1-5 is convenience.
EVERYBODY USES PLAYLISTS, ADULTS ALSO RADIO

When you listen to music, what do you listen to then?

- Young (15-24 y/ o)
- Young adults (25-31 y/ o)
- Adults (32-39 y/ o)

2/3 never listens to albums
4 IMPORTANT FINDINGS ABOUT PLAYLISTS

You put together your own playlists

….and go hunting for inspiration on others’ lists

The young are playlist experts

….and can easily juggle around 10+ playlists a week

Durability is the back bone of lists

You love every song and can play it over and over again

They are constructed around mood

The concept of a mood?

….also genre
72% LIKE TO LISTEN TO NEW MUSIC

Which of the following statements describes your attitude towards new music?

- I like new music, but I don't look for it: 36%
- I actively search for new music: 36%
- I don't care about new music: 28%

The youth are more proactive than adults.
# 3 IMPORTANT FINDINGS ABOUT MUSIC DISCOVERY

<table>
<thead>
<tr>
<th>Four main ways to music discovery</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Radio</td>
</tr>
<tr>
<td>2. Streaming services</td>
</tr>
<tr>
<td>3. Friends/relations</td>
</tr>
<tr>
<td>4. Playlists</td>
</tr>
</tbody>
</table>

## A broad definition of new music
- Music you haven’t listened to before
- Not only about release date

## Facts/background/experts is not important
- Play music, more than talking about it
- Who you are, not what you know
MUSIC DISCOVERY IS EVERYWHERE

- **From:** Music discovery in a certain time and place ex. Magazines, radio shows, record stores

- **To:** Music discovery are everywhere and all the time from a number of different sources: Shazam, Netflix, gaming, social media, streaming services, radio, relations
HOW IMPORTANT IS MUSIC TO YOUNG DANES?

• Music is perceived as essential

• Music is prioritized: 80% have a premium-account

• New music is new music for the listener, not release date

• Music discovery is everywhere and all the time

• Music curation is more about who you are, than what you know
WHAT IS THE INFRASTRUCTURE OF USAGE?

• Music streaming = Spotify
• Radio is young adults and adults
• Convenience is top priority
• YouTube is a music streaming service
• Smart phone with earplugs is the most used music device
• Music podcasts is used on a very limited scale
• You use own mood-based playlists
THINK NEW

Young

STILL IN THE GAME

Young adults
Adults
WHAT NOW?
TAKEAWAYS

1. Music is key if we want to reach young people

2. Expand our position of strength within music discovery

3. We must supplement radio with streaming and playlists
   • BBC Sounds?
TAKEAWAYS

4. Our music curation must support mood management

5. Expand our understanding of ”new” music

6. We must be more convenient in order to reach the young

7. There is an opportunity to reach young people in the afternoon/evening with specialized music offerings
THANKS!

petn@dr.dk
raki@dr.dk

DR Audience Research