VICTORIAN MUSIC DEVELOPMENT OFFICE

Consumer Insights Survey

Music is the number one passion for one in three Australians, and growing

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INTRODUCTION + KEY FINDINGS

#1

Music Is Even More Important To Australians Than Before The Pandemic

64%

Listen to Radio. Traditions Remain Though Paid Streaming Is Catching Up

46%

Say Finding New Music Is Important

+7%

Prefer Home Grown Talent (up from 2019)

59%

Under 35s Are Willing To Purchase Gig/Festival Tickets, CDs Or Merch

-11%

Overall Music Spend Is Down And Still Recovering (from 2019)

INTRODUCTION + KEY FINDINGS

It's official! In 2022 more people agree that 'music is [their] life and number one passion' than in 2019 according to VMDO and Music Victoria's Longitudinal Music Habits Survey in conjunction with Opinium.

Furthermore, radio and TV remain strong traditional consumption methods, though paid streaming is catching up as music makes its way into different parts of our lives (like exercise). Australians are also discovering more music online, where TikTok's influence in the discovery space is catching up with Facebook and Instagram. Once Australians discover something, we're adding it to and listening to our own playlists more and more, rather than to playlists from other curators - maybe in a similar way to how we've curated our own CD and record collections in the past.

U35s are the most willing to spend financially on music and also have the strongest desires for more engagement with artists on channels like YouTube, Instagram and Facebook. Australians want to support local artists and it seems gig and festival attendance is growing in the 'new normal', though growth hasn't yet translated to spending habits - recorded music spends are up though haven't yet been able to offset live music and merch spends which are down, contributing to lower spend overall compared to 2019 pre-pandemic levels. This may be reflected in Audience Outlook Monitor's Oct 2022 research that financial barriers have now overtaken covid transmission as the main barrier to concert attendance.

METHODOLOGY

This longitudinal survey results come from the participation of 2,000 Australians, aged 16+ with fieldwork dates between 21- 28 July 2022, following up from VMDO's 2019 Music Consumer Insights Study. The sample was again designed and monitored to ensure it reflects the make-up of the Australian population as a whole - including age, gender and socioeconomic factors - rather than just music lovers.

While other data sources can be strictly numerical (such as your end of year top streams count or venue ticket sales), consumer surveys tap a little deeper into the human conscience and its consideration. For example, we asked people to think about an artist or song they had come across for the first time in the past 3 months. We did not offer them any criteria beyond discovery. It could have been an old artist/song, such as Bohemian Rhapsody, that was new to them – or simply a brand-new release. We then asked them to consider how they had found out about that artist or song - the key being the method that they identified themselves with.

Not only does this help us identify how Australians consider their relationships to music, this also helps us connect the dots not only across different platforms, but also the different outlets, experiences and other consumption habits. Even more than that, surveys can help us understand what motivates a music fans' consumption habits, and how that motivation is developing as entertainment itself evolves toward the future. Knowing what happened is one thing, knowing why it happened, and being able to make it happen again, can be much more powerful.

MUSIC SENTIMENT + ATTITUDES

Music is more important to Australians than before the pandemic.

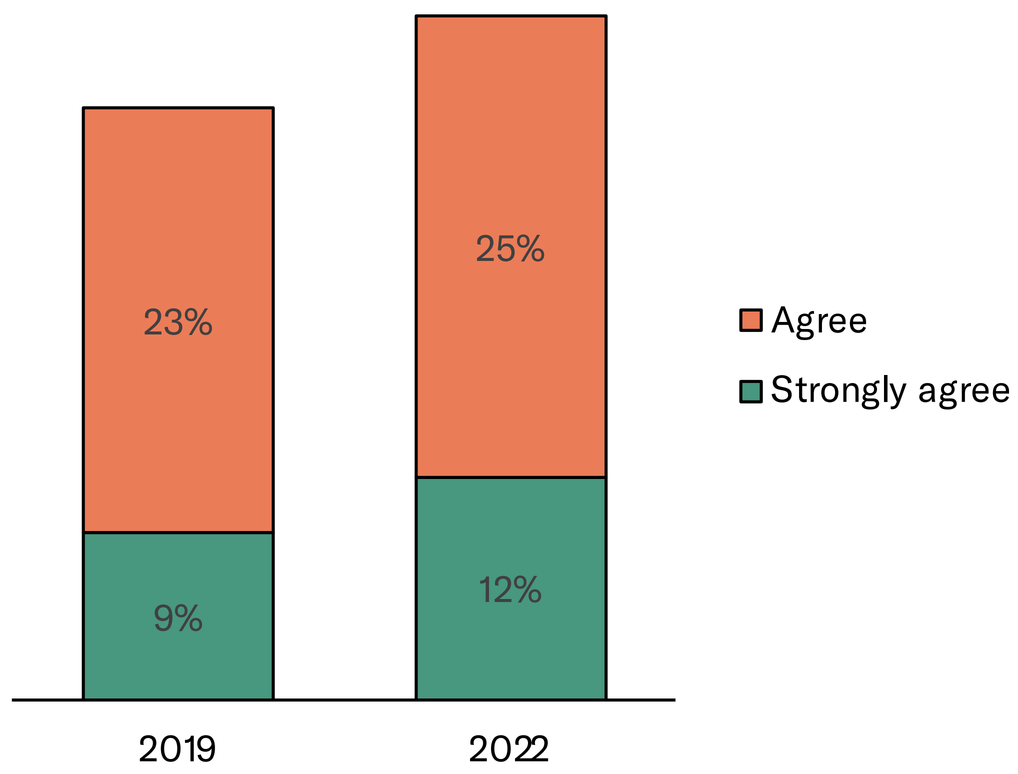
#1

And growing...

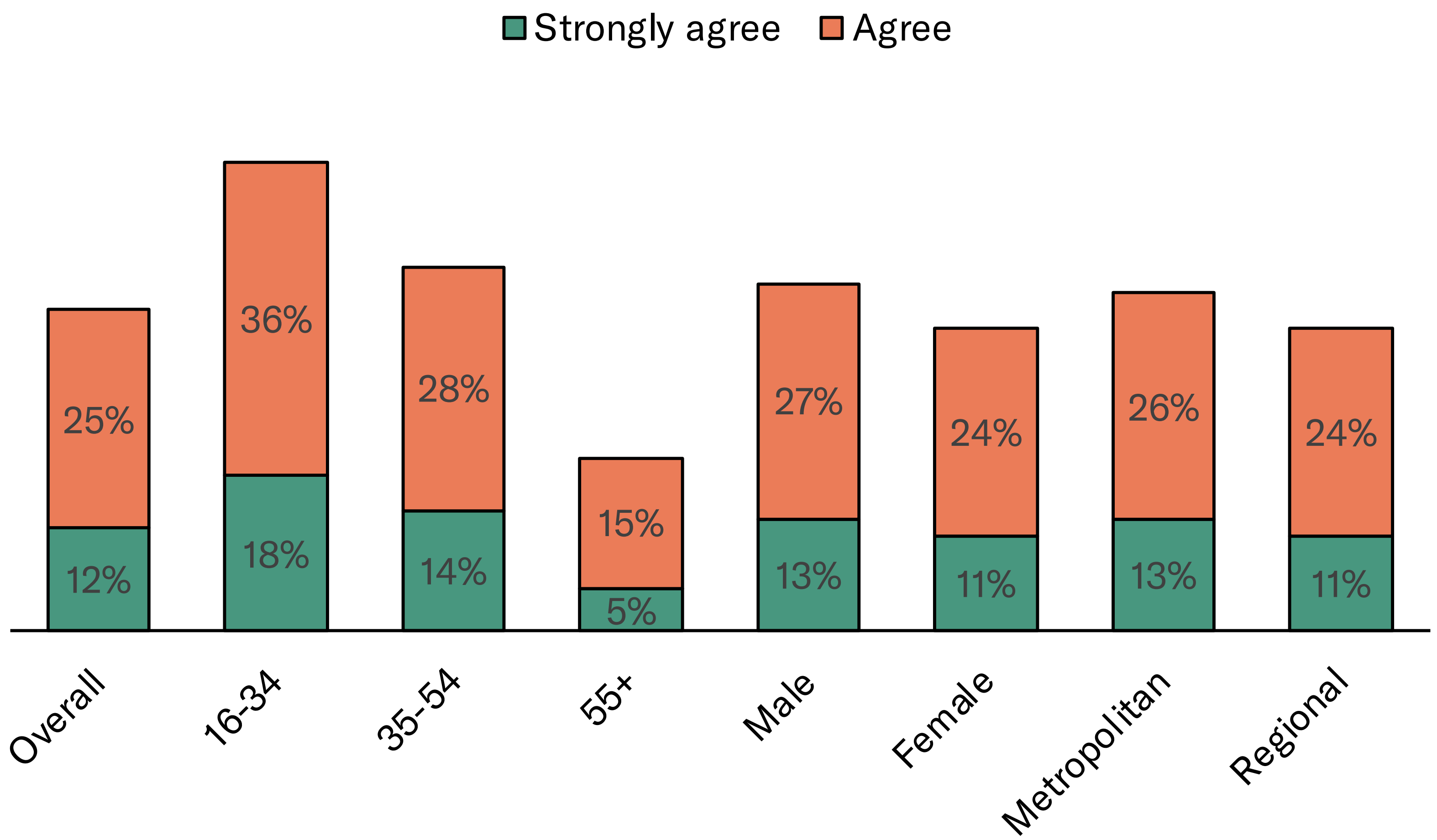
During the last three years, Australians have realised more and more that 'music is [their] life and number one passion' in comparison with the previous consumer insights study undertaken in 2019. Whilst 2019 saw 23% agree with the statement, and 9% strongly agree, this year those figures are up to 25% and 12% respectively. This is particularly the case among those in the age groups 25-34, and 35-44. However, all ages noticed an uptick, except those 55+.

The split is as follows:

2019 vs 2022
'MUSIC IS MY LIFE AND NUMBER ONE PASSION'



‘MUSIC IS MY LIFE AND NUMBER ONE PASSION’



AGE GROUP	2019	2022
16-24	Strongly Agree: 18% Agree: 33%	Strongly Agree: 19% (+1%) Agree: 34% (+1%)
25-34	Strongly Agree: 17% Agree: 27%	Strongly Agree: 17% (N/C) Agree: 37% (+10%)
35-44	Strongly Agree: 6% Agree: 27%	Strongly Agree: 17% (+11%) Agree: 32% (+5%)
45-54	Strongly Agree: 6% Agree: 22%	Strongly Agree: 10% (+4%) Agree: 23% (+1%)
55+	Strongly Agree: 5% Agree: 15%	Strongly Agree: 5% (N/C) Agree: 15% (N/C)

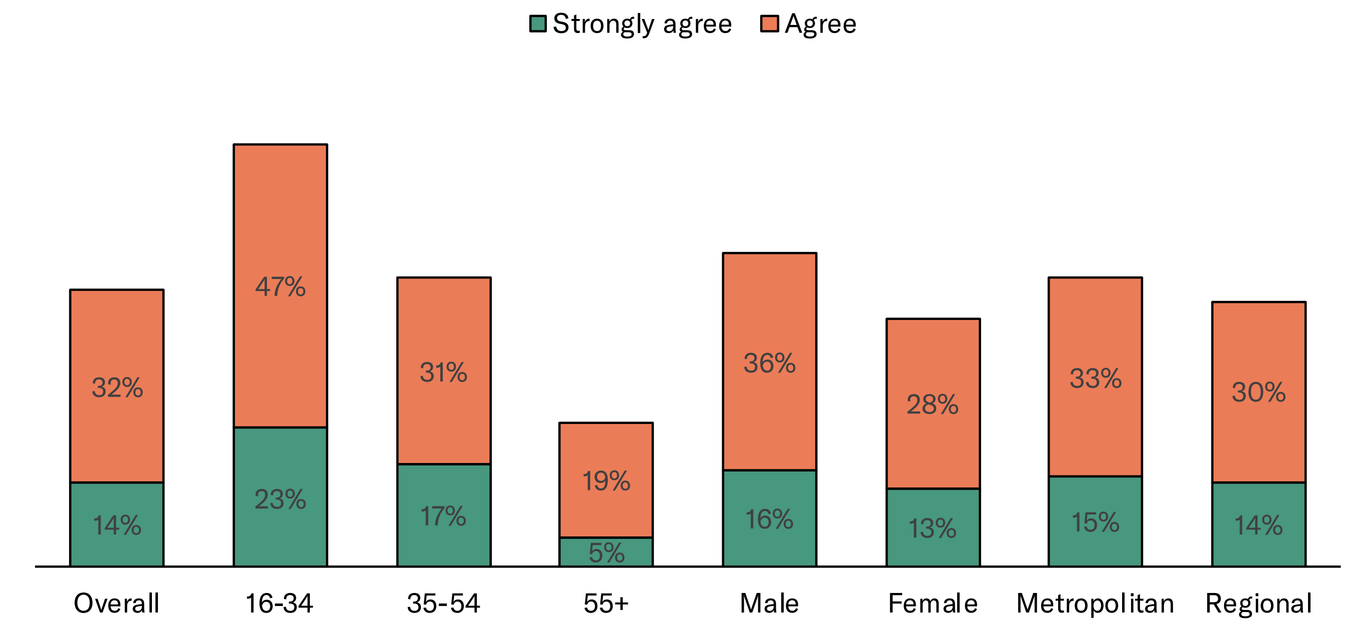
37%

Music is my life, my #1 passion

This graph shows that over a third (37%) of Australians agree (albeit to differing extents) that music is their life, their number one passion. That is especially the case amongst younger generations – but less so for those over 55. Over half (54%) of under 35s agreed that music was a central passion – with almost a fifth (18%) strongly agreeing that it is their life. However, only one in five over 55s agreed with the statement, and only 5% strongly agreed.

Australians want to discover more music.

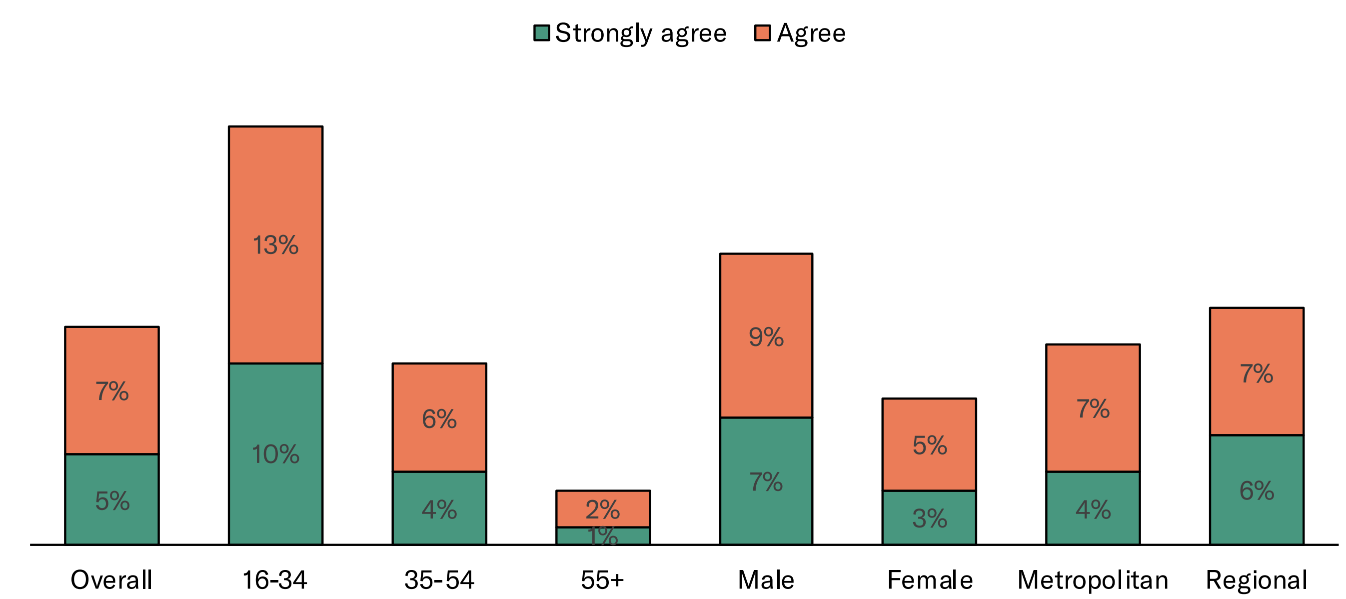
‘FINDING NEW MUSIC IS IMPORTANT TO ME’



It is also abundantly clear there is also a strong culture of music discovery amongst Australians. Almost half (46%) claim finding new music is important to them, with that figure up to 70% for under 35s.

Almost everyone likes music.

‘I DON’T LIKE MUSIC AT ALL’



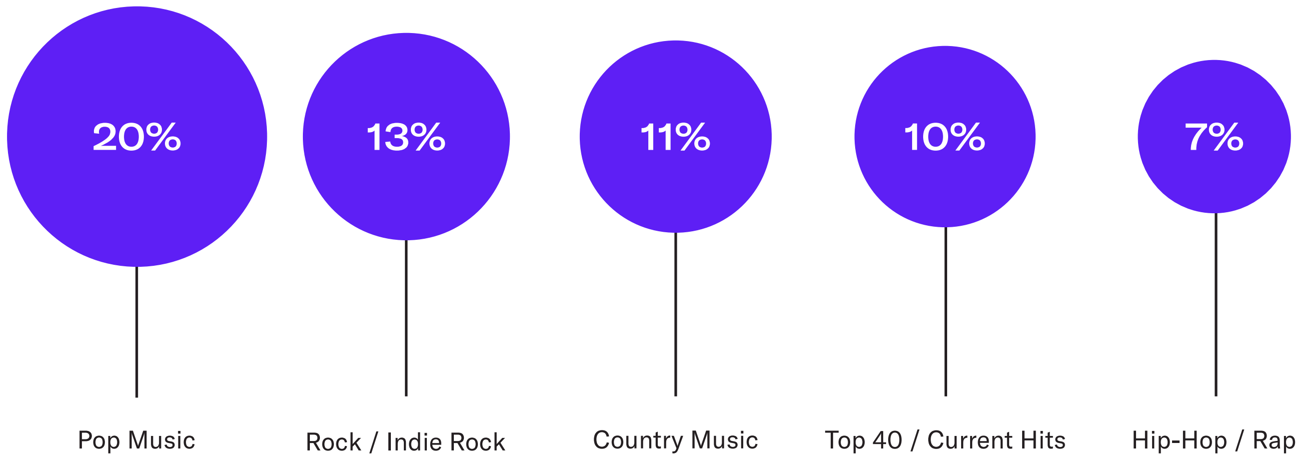
When it comes to negativity around music, with the statement ‘I don’t like music at all,’ there is certainly only minor agreement. Just a tenth (12%) of Australians agree to some extent.

46%

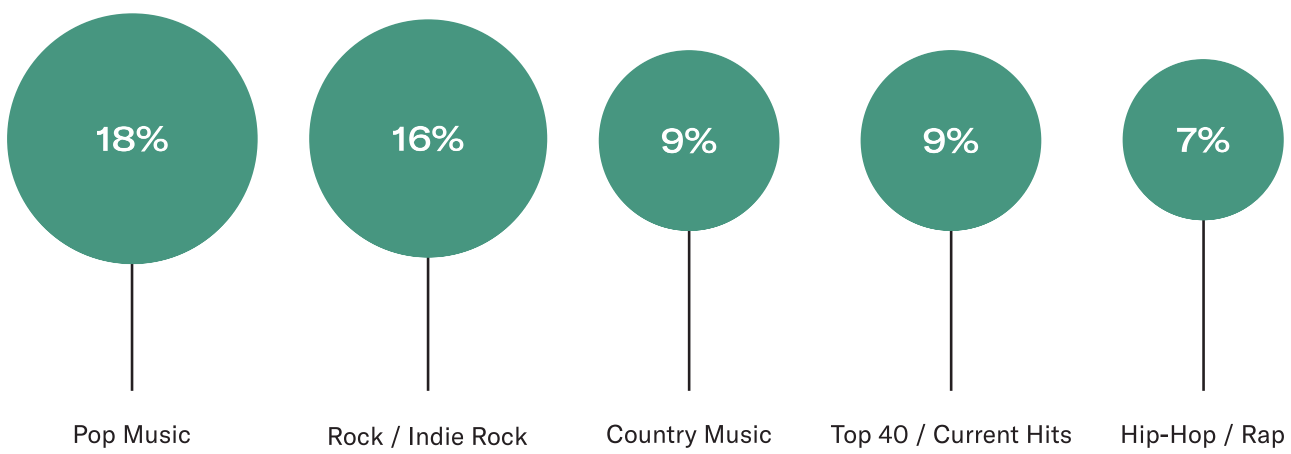
of Australians say finding new music is important

Pop Music = popular music. It's Australia's favourite genre.

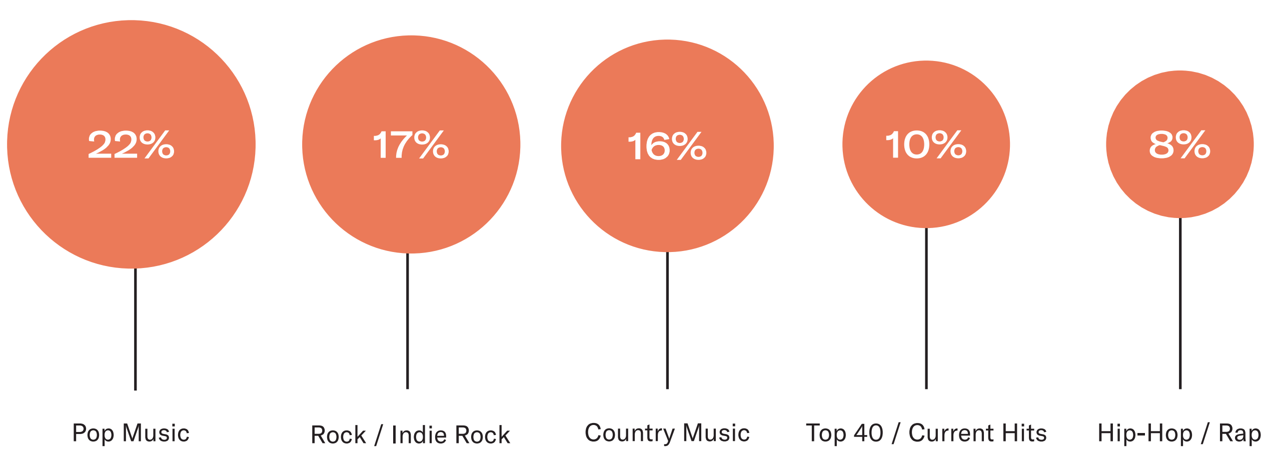
OVERALL



UNDER 34s



OVER 55s



Living up to its name, Pop Music is clearly the most popular music genre in Australia.

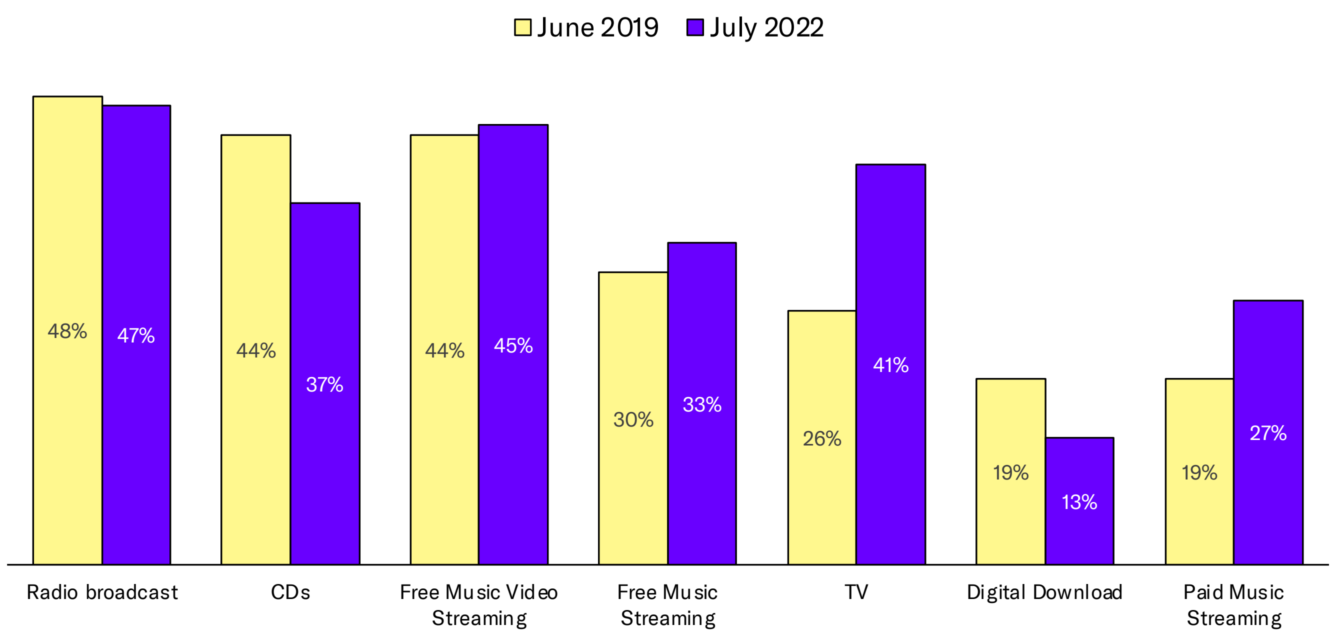
Whilst three fifths (59%) of Australian adults say they regularly listen to Pop Music, a fifth (20%) claim it is their favourite genre. This is the case amongst all decade age-groups, except 16-24s who marginally prefer hip-hop/rap (22%). There also appears to be a gender split – 23% of women say Pop Music is their favourite genre, with only 16% of men saying the same.

Australia's next most popular genres are rock/indie rock (13%) and country music (11%). The former is considerably more popular among men than women (16% vs 11%), whilst country music has a solid base in the regions compared to metro (14% vs 9%).

MUSIC CONSUMPTION

Radio and TV remain tradition, paid streaming is catching up.

OVERALL CONSUMPTION METHODS TRACKED (JUN '19 – JUL '22)



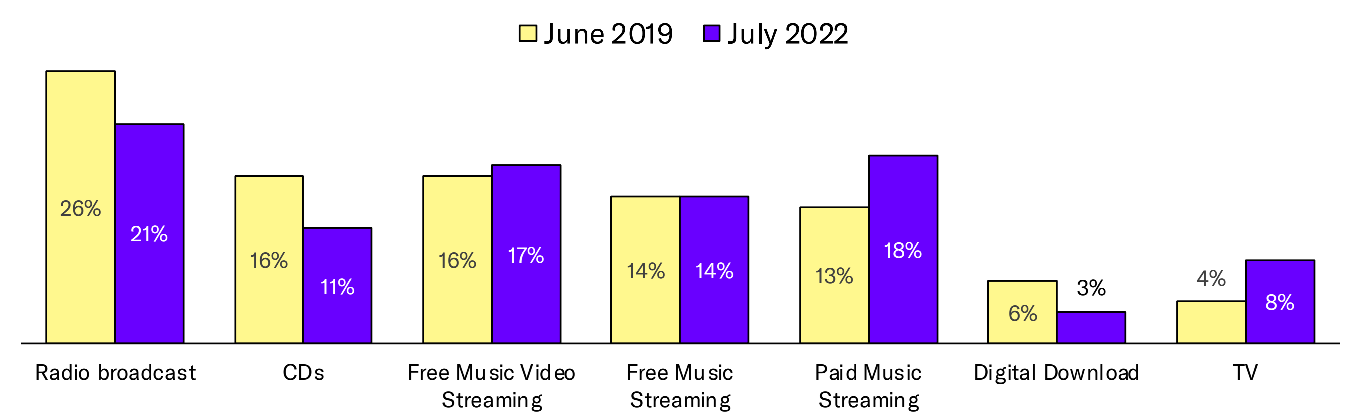
Tracking data from the last report conducted by Music Victoria, in June 2019, we are able to understand how music consumption has developed over time. Three years is a long time in the digital age, and this data shows exactly that.

Notably, radio broadcast (a combination of both commercial and community) has maintained its position as number one consumption method – witnessing a consistent consumption since 2019 and again reflecting the strong presence of community stations like Triple R and PBS. Similarly steady trends can be seen for free streaming services – with free music video streaming up a percent, whilst specifically free music streaming up 3%.

The largest data jumps are in TV and paid music streaming. Two fifths (41%) of Australian adults consume the former, representing a 15% jump on June 2019. Over a quarter (27%) now say they consume music via paid music streaming, up 8% on three years ago.

Once seen as the modern evolution from vinyl, CDs are the subject of a decisive decline in consumption, down 7% on three years ago. That being said, CDs are still the 4th most consumed music format, behind radio, free music video streaming, and TV. The successor to CDs, digital downloads, is also witnessing a demise – whereas a fifth (19%) of the population consumed them three years ago, this now sits at 13% (-6%).

MAIN CONSUMPTION METHODS TRACKED (JUN '19 – JUL '22)



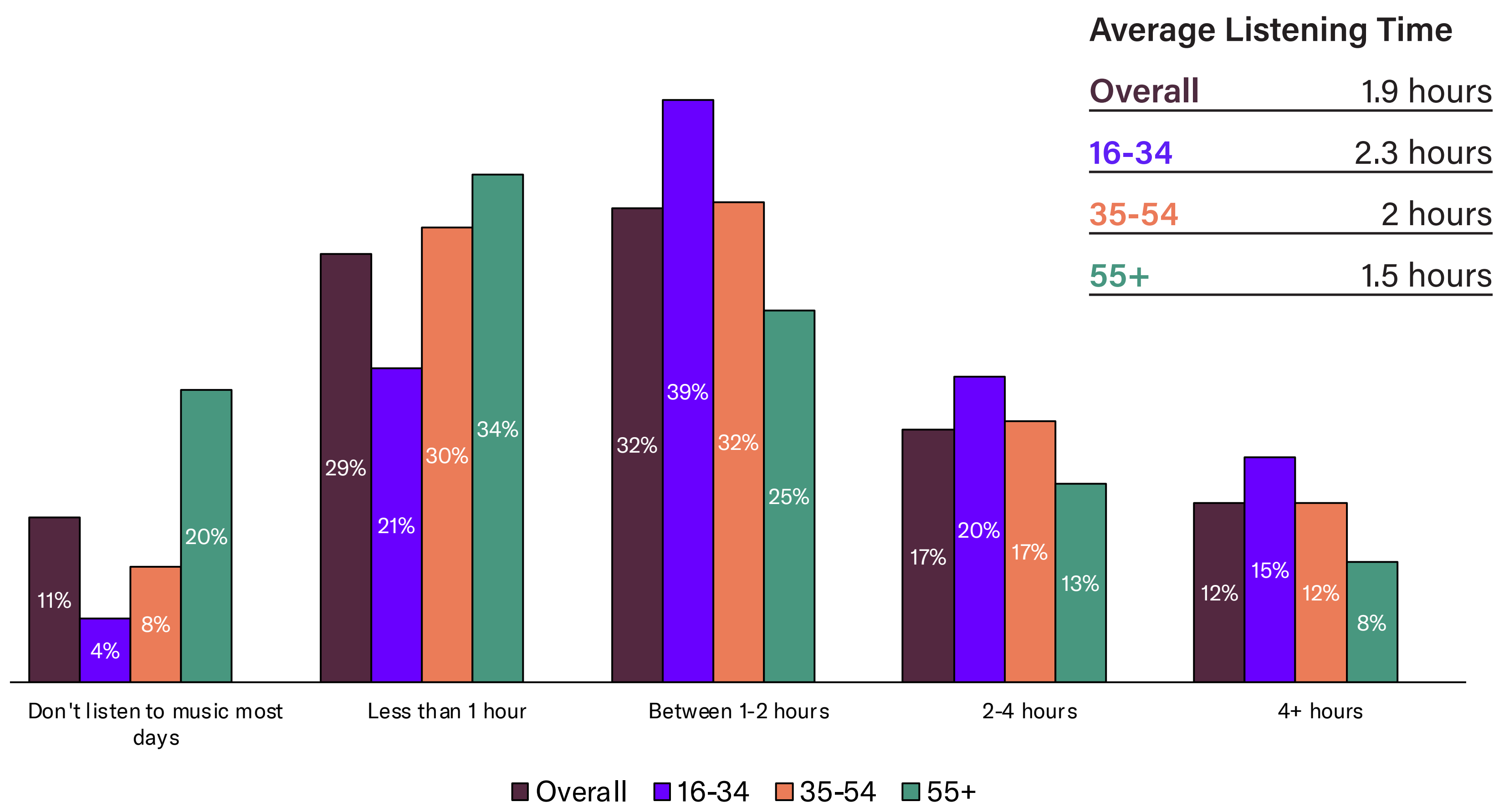
Looking away from general consumption trends, and specifically at peoples' favourite/main consumption methods, streaming has solidified its place in the eyes of Australia. Taken together, 49% of Australians say streaming of free music, free music video, or paid music, is their preferred method – up 6% on three years ago.

Radio is still a favourite music consumption method (21%), despite being down 5% on three years ago. Physical music consumption, in the format of CDs, has seen a similar decline in favouritism – down 5%, to 11%, on the last survey.

1.9

Listening hours every day.

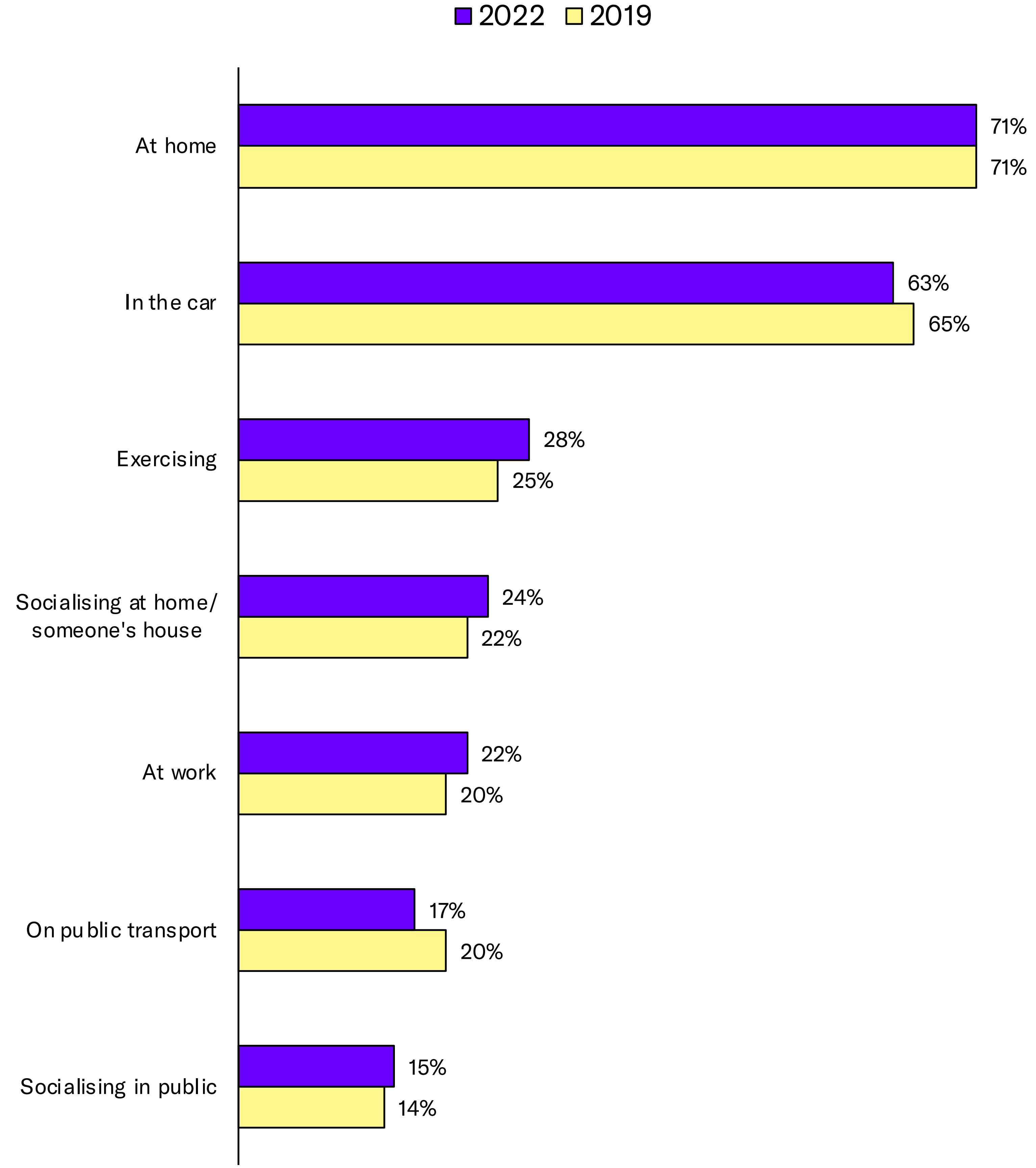
DAILY MUSIC LISTENING TIME



There is a clear inverse relationship between age and daily music consumption. Whilst at an average level, an Australian level listens to 1.9 hours of music every day, this shifts dependent on age. Those under 34 listen to an average of 2.3 hours of music a day, with 15% listening to more than 4 hours. Those over 55, however, are less frequent consumers – with an average of 1.5 hours. A fifth (20%) of over 55s say they don't even listen to music most days.

Music is making its way into more spaces.

WHERE DO YOU LISTEN TO RECORDED MUSIC?

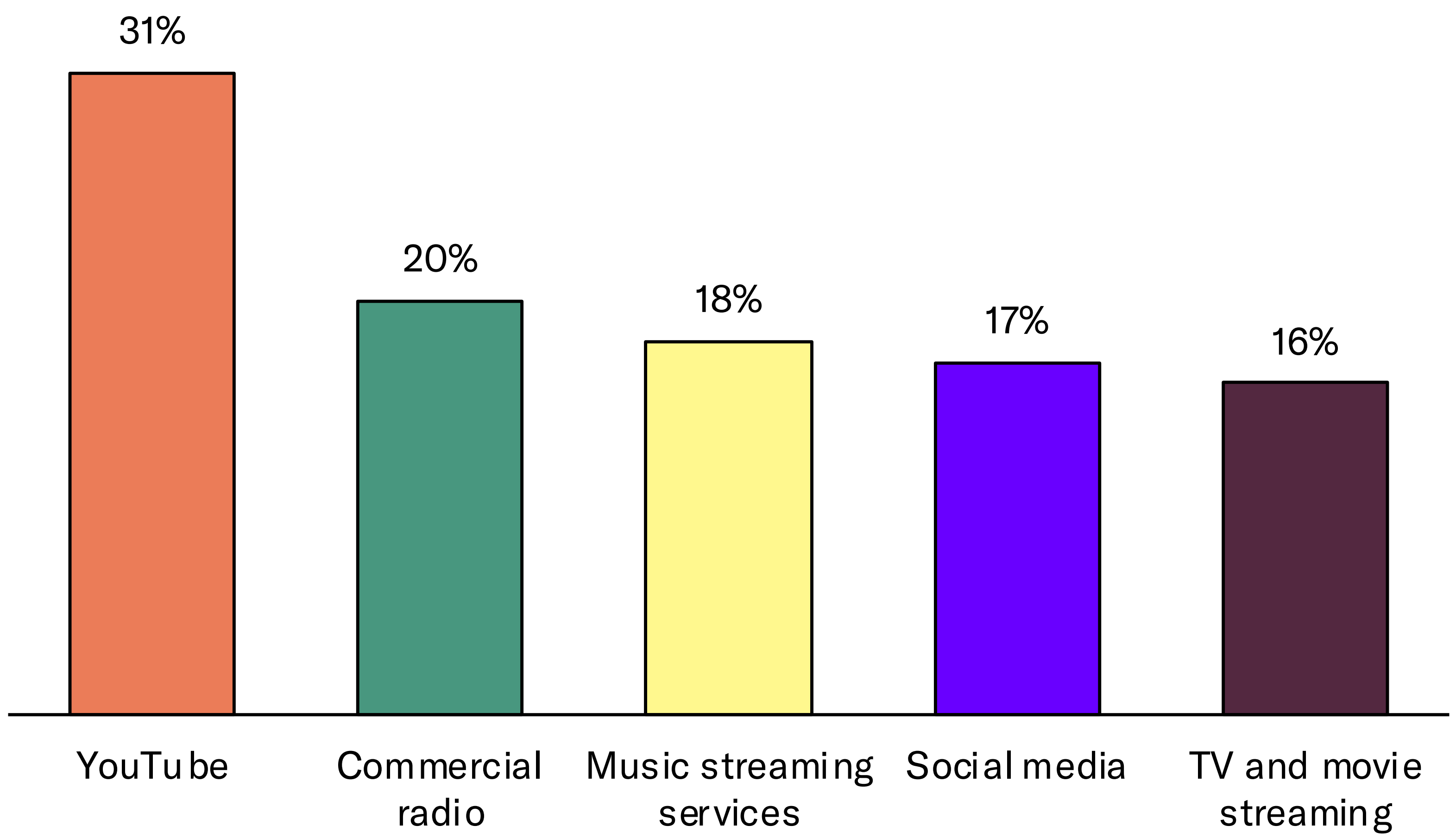


Unsurprisingly, the vast majority listen to recorded music either at home (71%) or in the car (63%). Easier access to improving technologies could also explain why music is making its way into different parts of our lives. Whilst 28% say they also listen to recorded music when exercising, this does shoot up amongst under 35s (44%).

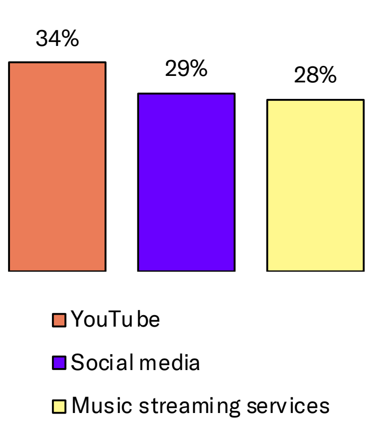
These figures are roughly in line with pre-pandemic levels, although we are witnessing a small uptick of exercise-based music consumption (+3%) and a slight reduction in public transport consumption (-3%).

MUSIC DISCOVERY

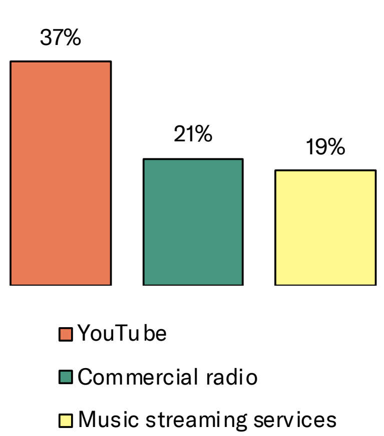
OVERALL: TOP MUSIC DISCOVERY METHODS - PAST 3 MONTHS



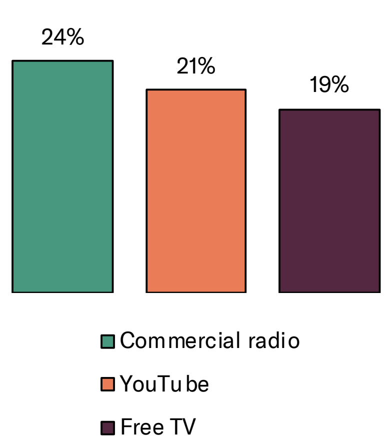
16-34: TOP MUSIC DISCOVERY METHODS - PAST 3 MONTHS



35-54: TOP MUSIC DISCOVERY METHODS - PAST 3 MONTHS



55+: TOP MUSIC DISCOVERY METHODS - PAST 3 MONTHS



Australians are discovering more music online.

We wanted to delve a little into the music discovery habits of Australians. Where do people go to find new music? Online? Word-of-mouth?

This is where we asked people to think about an artist or song they had come across for the first time in the past 3 months without offering any criteria beyond discovery. It could have been an old artist/song, such as Bohemian Rhapsody, that was new to them – or simply a brand-new release. We then asked them to consider how they had found out about that artist or song.

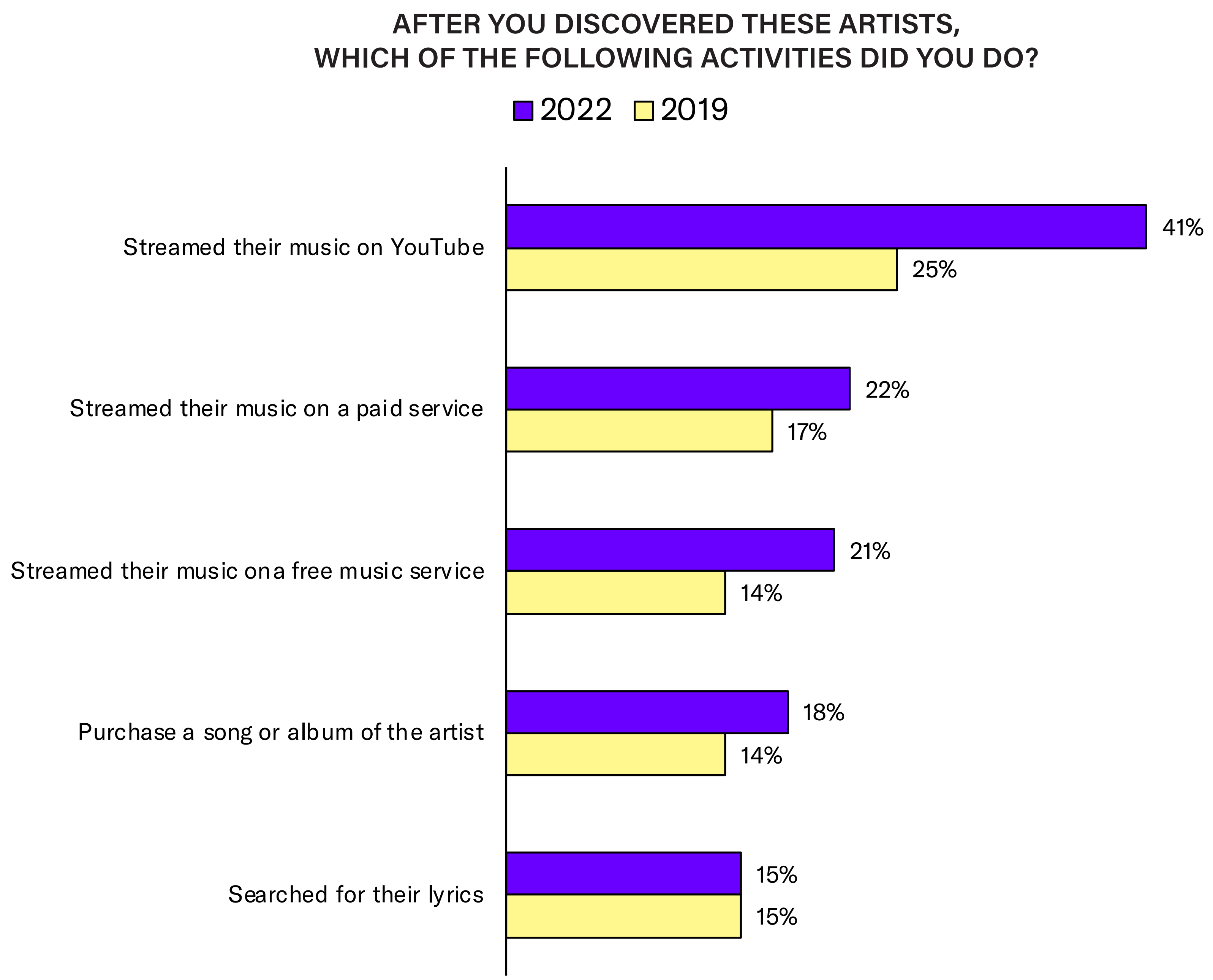
There is clearly a standout music discovery method for Australians: YouTube. Nearly a third (31%) of all new music discovered in the past three months was discovered on the platform. This is especially the case among those aged between 35 and 54 (37%). It is also the key discovery mechanism for under 34s (35%). However, among this age group – the social media generation – wider social media is nearly as influential as YouTube (29%). Those over 55 are influenced most by radio, with a quarter (24%) of this age group finding new music on commercial radio.

TikTok's discovery influence is growing, Facebook and Instagram still important.

Among the 17% who claimed music discovery on social media, Facebook was most popular, followed by Instagram, TikTok and Twitter. Interestingly, the one exception was in the 16-34 age bracket, where TikTok has grown to be the most popular and was also the only age bracket to feature Snapchat:

CATEGORY	MOST POPULAR	2ND MOST POPULAR	3RD MOST POPULAR	4TH MOST POPULAR
OVERALL	Facebook (61%)	Instagram (55%)	TikTok (50%)	Twitter (18%)
16-34	TikTok (65%)	Instagram (63%)	Facebook (46%)	Snapchat (20%)
35-54	Facebook (79%)	Instagram (54%)	TikTok (40%)	Twitter (21%)
MALE	Facebook (68%)	Instagram (53%)	TikTok (47%)	Twitter (24%)
FEMALE	Facebook (57%)	Instagram (57%)	TikTok (50%)	Twitter (18%)

Once discovered, the key follow-up activity was to head to YouTube and stream their music. Two fifths (41%) of those who discovered an artist or song in the last 3 months said they did this. Streaming on other platforms, such as paid music services or free music services, were the next most popular follow-up actions – 22% and 21% did this, respectively. The one action that hasn't changed since 2019 (and might happen irrespective of evolving technologies) is that 15% of people wanted to find the lyrics.



RECORDED MUSIC

Australians buy merch and tickets.

MUSIC EXPENDITURE, LAST 12 MONTHS

18%

Bought a CD

14%

Bought a gig ticket

11%

Bought music merchandise

10%

Bought a ticket to a festival

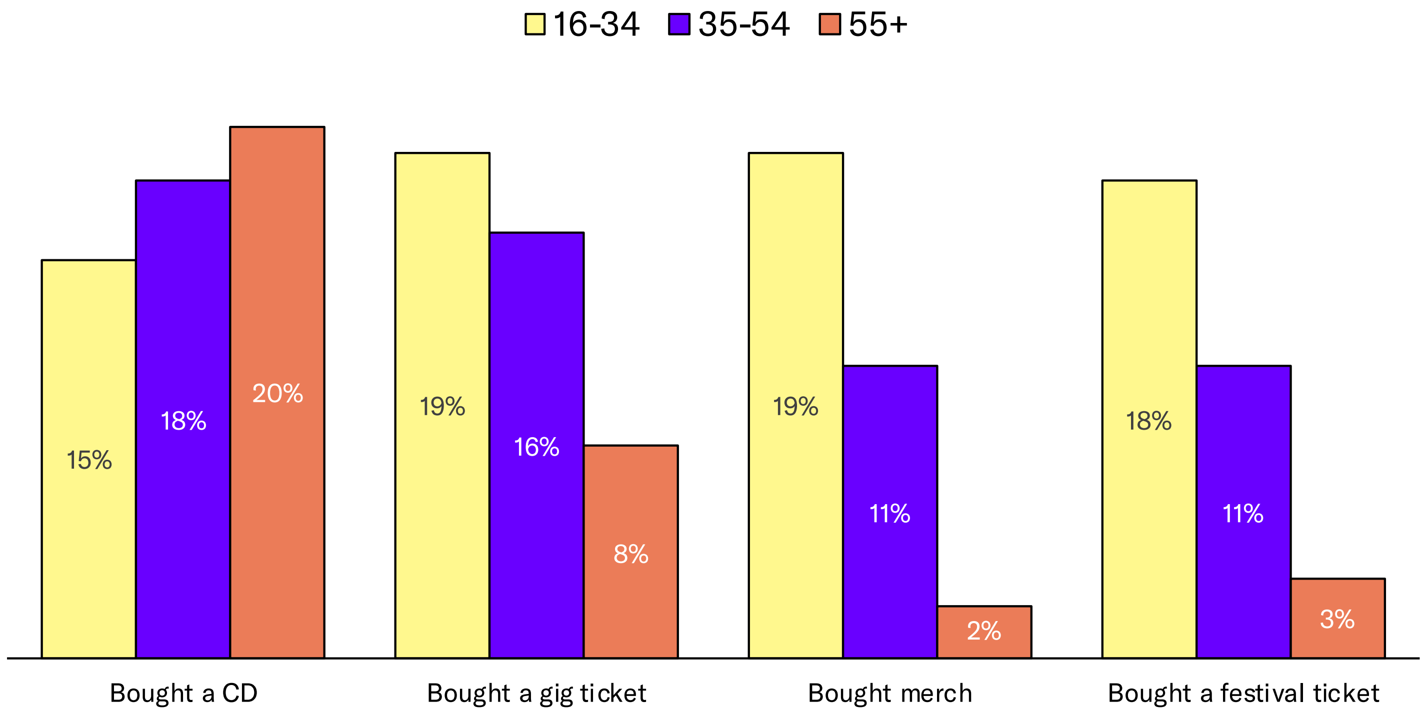
In the past 12 months, the most common music purchase across Australia has been the purchaseof a CD. Nearly a fifth (18%) of adults say they had bought one. Slightly less (14%) said they had gone to a live show, buying a ticket for a gig. A tenth (10%) said they bought a ticket to a festival, an album MP3 download, or a single MP3 download.

Live music ticket purchases, either for a gig or festival, are considerably higher amongst those under-35. Nearly a fifth (19%) of under 35s say they had bought a ticket to a gig in the past year, whilst a similar figure had said the same about festivals (18%).

More generally, younger adults had a propensity to engage financially in music – with 59% of under 35s selecting any option – whilst only 32% of over 55s engaging.

Youth are the most willing to invest.

TOTAL MUSIC EXPENDITURE, LAST 12 MONTHS



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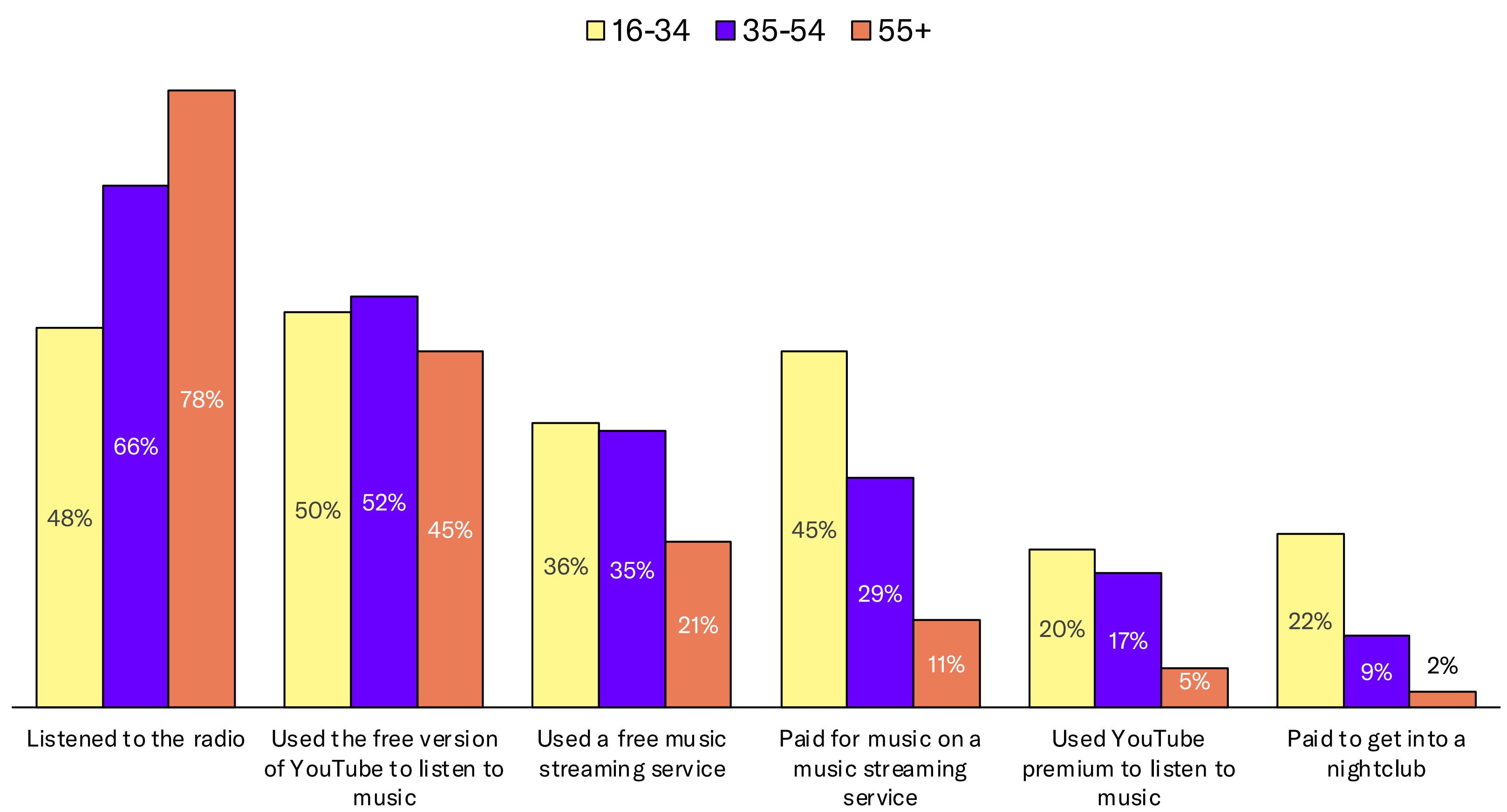
59%

of under 35s selected any purchase option

64%

of Australians listen to the radio

TOP MUSIC ACTIVITIES, LAST 12 MONTHS



Almost two thirds (64%) of Australians say they have listened to the radio in the past year. However, there is indeed a generational split, as 4 in 5 (78%) over 55s claim to have listened to the radio, whilst only half (48%) of under 35s can say the same. The use of the free version of YouTube, however, is a pretty universally popular activity – across all generations.

Paid-for music streaming is definitely an activity for young adults, however, as only a tenth (11%) of over 55s have paid for music on a service in the last 12 months – compared to almost half (45%) of all under 35s.

DIGITAL MUSIC PLATFORMS

DIGITAL MUSIC PLATFORM: USAGE

The free version of YouTube is by a clear margin the most regularly used vessel for music consumption. A fifth (22%) of the Australian adult population use it every day, whilst an additional quarter (24%) say they use it a few times a week. Only 30% say they never use the service.

Spotify – both free and premium – reign supreme over all other music-specific streaming services. Taken together, over a quarter (27%) of Australians use Spotify free or premium, every day. Comparatively, just under a tenth (8%) use Apple Music every day, and slightly less use either Amazon Prime Music (6%) or Google Play (5%).

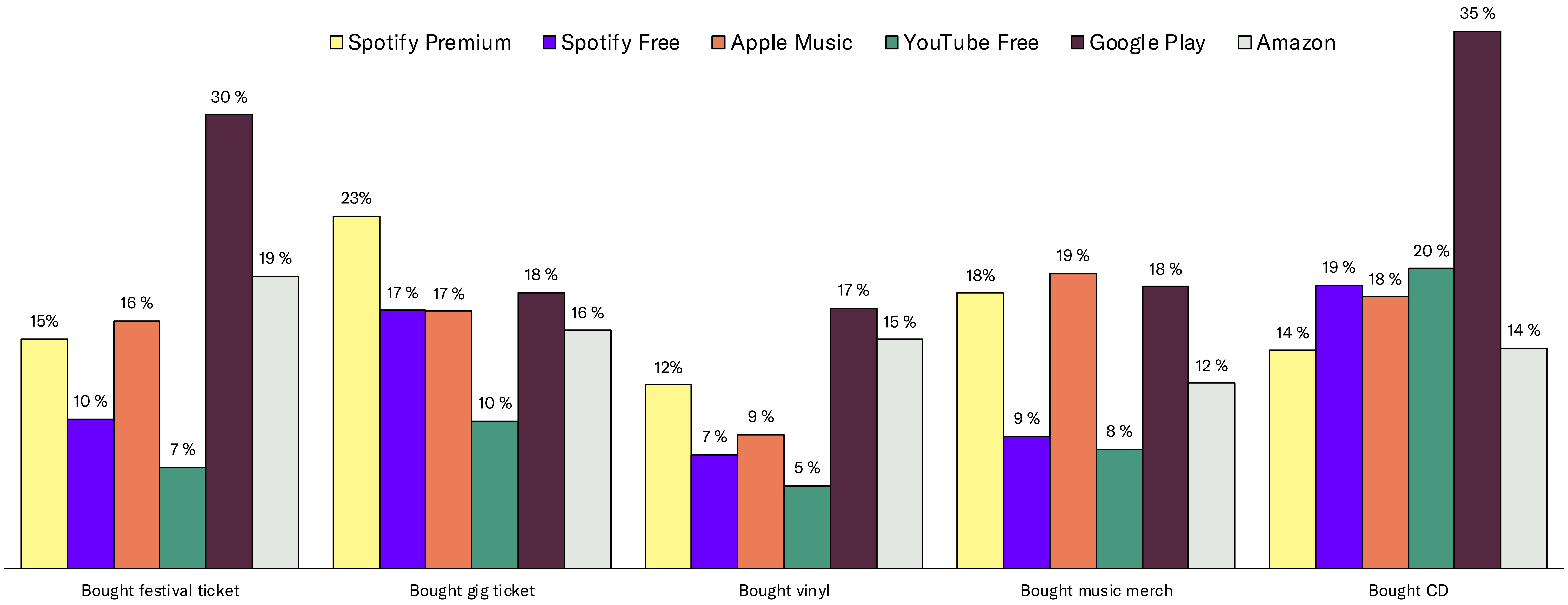
Among all who use any digital music platform, 37% of Australians said YouTube Free was their main way to listen to music. A fifth (20%) said Spotify Premium – slightly less said the free version (17%).

Listeners turn into fans.

Google Play and Amazon Prime Music buffs are the top festival ticket and vinyl purchasers – way ahead of those who listen to YouTube Free and Spotify Free predominantly. It is Spotify Premium listeners who are most likely to have bought a gig ticket in the last 12 months – again significantly outweighing the YouTube free listeners.

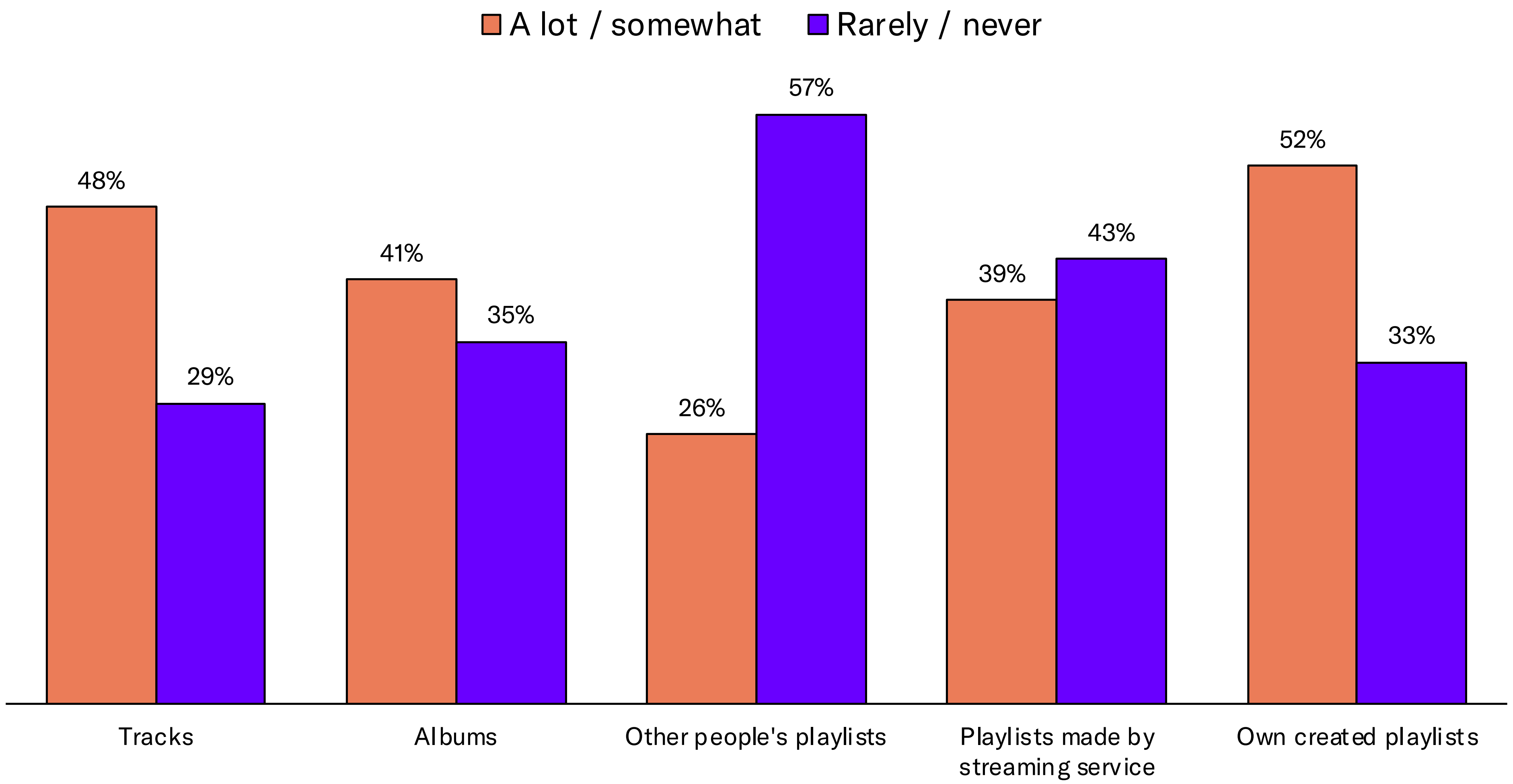
Over the past 3 years, it is clear that a universal shift towards regular usage of music streaming apps has occurred – across every platform. The free version of YouTube has solidified itself as the app most regularly engaged with, but Spotify Premium has seen a tremendous jump in regular engagement – from 16% in 2019 to 27% this year.

MUSIC PURCHASE: SPLIT BY FAVOURITE MUSIC SERVICE



We trust our own judgement, and listen to our own playlists. We're also enjoying singles, and albums.

HOW OFTEN DO YOU LISTEN TO...?

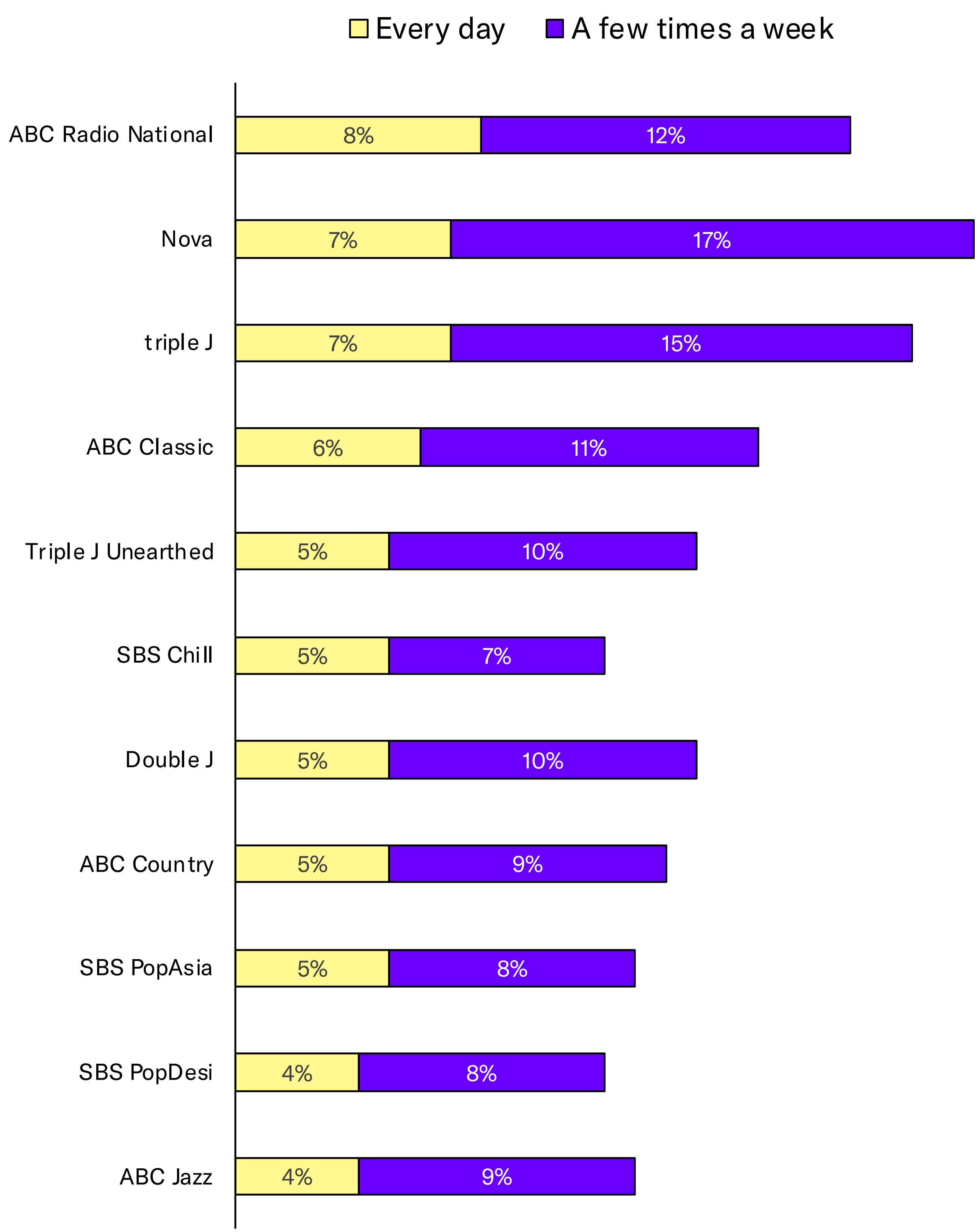


The oft-cited debate around the demise of albums and rise of individual tracks is laid bare in the data. Half (48%) said they listen to tracks either a lot, or somewhat, whilst 29% said they rarely or never listen to them. When it comes to albums, however, 41% said they listen to them a lot or somewhat – but a third (35%) said they rarely or never do so.

Self-curated playlists are much more popular than other people's playlists or those made by streaming services. Half (52%) said they listen to their own created playlists at least somewhat – significantly more than those made by streaming services (39%) and other people's playlists (26%). Decades-themed (45%) and genre-based playlists (41%) are the favourites of those who listen to playlists created by others.

RADIO

NATIONAL RADIO STATIONS, RANKED BY EVERYDAY LISTENING



STATE	MOST POPULAR	2ND MOST POPULAR	3RD MOST POPULAR
VICTORIA	GOLD 104.3 (30%)	FOX FM 101.9 (27%)	smoothfm 91.5 (27%)
NEW SOUTH WALES	KIIS 1065 (25%)	smoothfm 95.3 (25%)	WSFM 101.7 (23%)
QUEENSLAND	97.3FM (26%)	ABC Brisbane (19%)	B105 (18%)
SOUTH AUSTRALIA	Mix 102.3 (37%)	Cruise 1323 (27%)	ABC Adelaide (25%)
WESTERN AUSTRALIA	Mix 94.5 (34%)	ABC Perth (24%)	92.9 Triple M Perth (22%)

Whilst Nova is the country's most popular national radio station based on weekly listens, with a quarter (24%) saying they listen at least a few times a week – it is ABC Radio National that tops the daily charts.

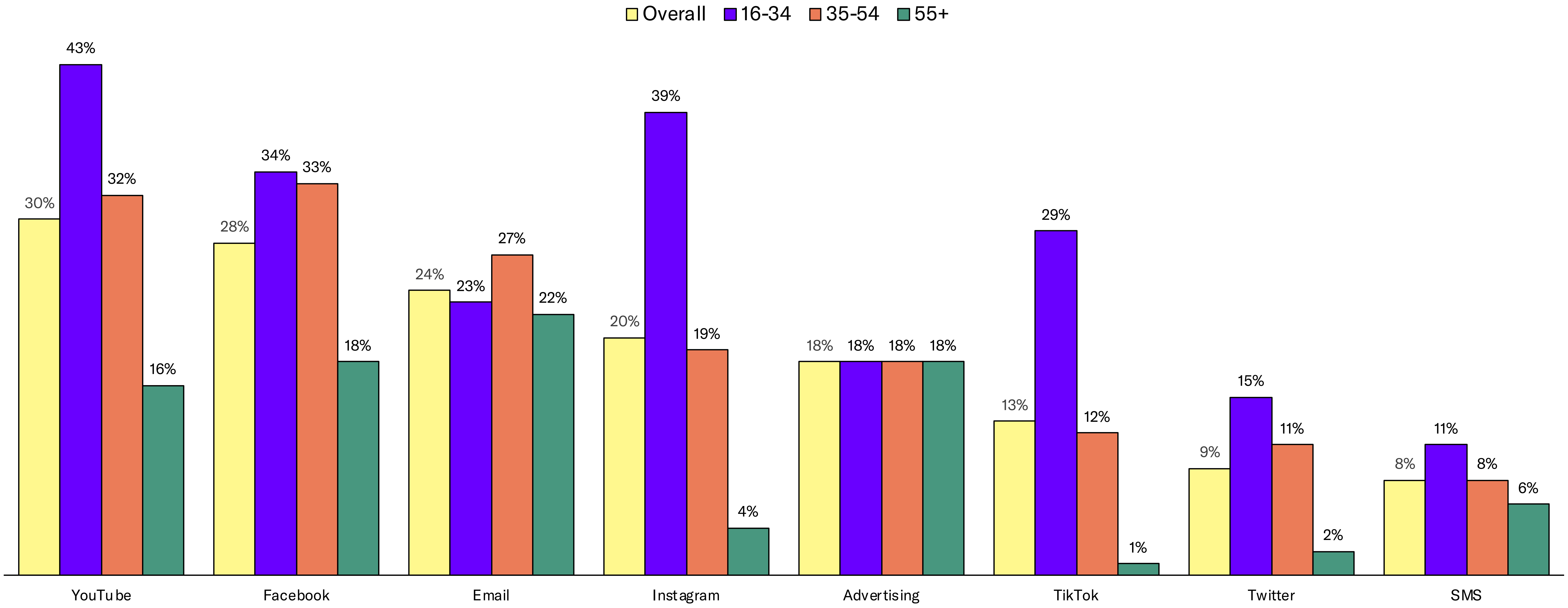
INTERACTING WITH FANS

Fans want to engage - especially under 35s.

YouTube is both the key method of music discovery in Australia, and how fans want to receive updates from their favourite artists. Almost a third (30%) said they would like to see YouTube updates from the artists they like. This is particularly the case among younger generations, as 43% of under 35s saying the same.

Whilst email and advertising updates are consistently popular across all ages, Instagram (39%) and TikTok (29%) stand out as leading platforms for the under 35s. Conversely, the over 55s barely chose Instagram (4%) or TikTok (1%). For over 55s, the most wanted platform for updates is email (22%). And for the 35-54s, Facebook (33%).

HOW WOULD YOU LIKE TO SEE UPDATES FROM ARTISTS YOU LIKE?



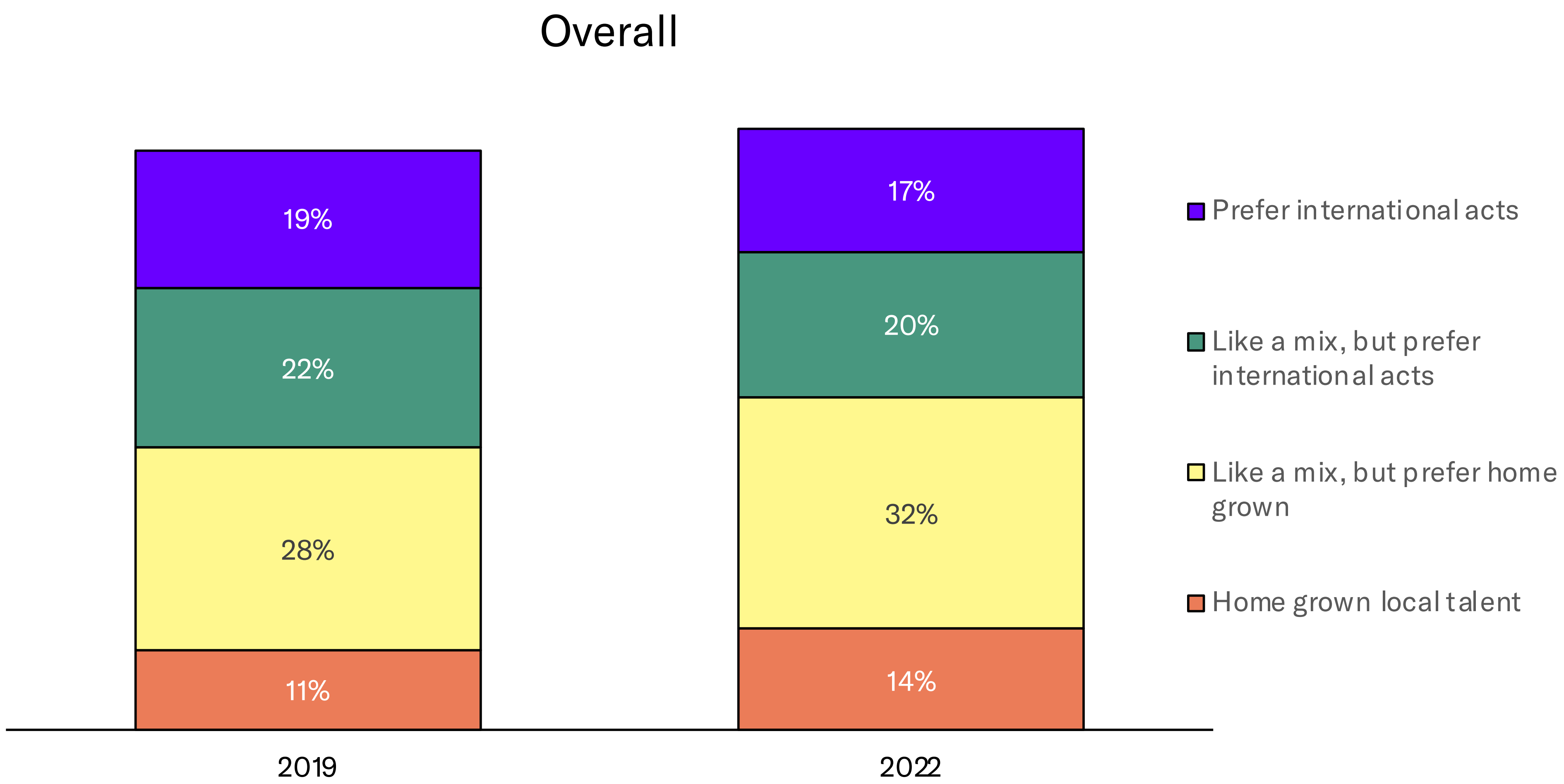
Our soundtrack, our stories.

Majority prefer to see a mix of home-grown talent and international touring acts when watching live music in Australia.

+7%

Prefer home-grown talent (from 2019)

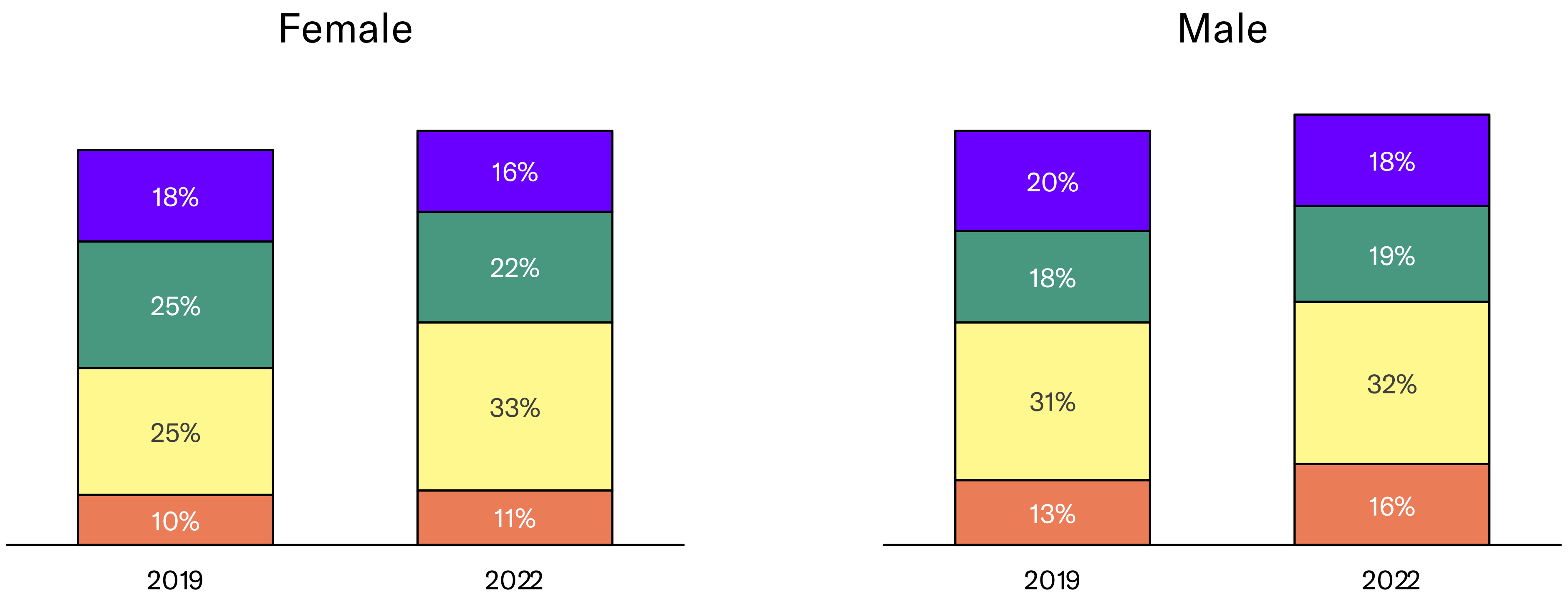
DO YOU PREFER TO SEE...?



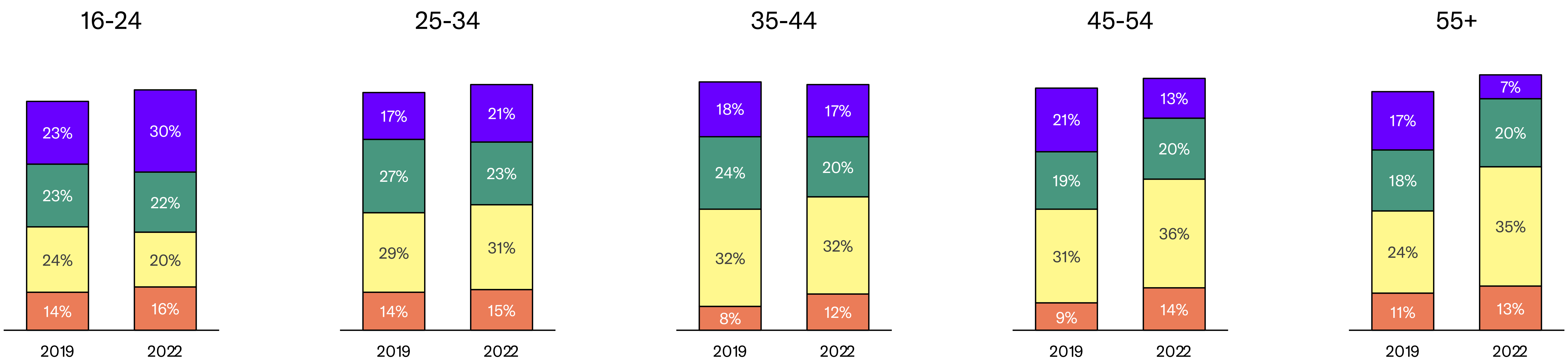
Asked to consider who they preferred to see, when they watched live music in Australia, the majority (53%) said they liked to see a mix of both home-grown and international touring acts. The general preference, however, is home-grown over international touring acts. Whilst 14% said they preferred to see home grown local talent, a further 32% said they liked a mix of both but preferred more of the home-grown local talent – a combined figure of 46%. Conversely, 17% said they preferred to see international touring acts, with 20% saying they liked a mix of both, but preferred international touring acts – a combined figure of 37%.

Australians have a hunger to support locals.

INTERNATIONAL ACTS VS HOME-GROWN: OVER TIME



It is clear to see that overall, there has been a slight shift away from international acts as a preference to home-grown acts in the past 3 years – courtesy of a global pandemic stopping global touring.



LIVE MUSIC

LIVE MUSIC VENUES: VISITS

58%

Attend Bars & Clubs

*fewer than 200 people

Perhaps unsurprisingly, due to cost and locality, Bars & Clubs (capacity less than 200 people) are the most attended music venue. Only 42% say they never visit Bars & Clubs to watch music, compared to those who never attend a large festival for example (55%), or a ticketed dance music event (62%). A fifth (21%) of under 34s, however, say they visit Bars & Clubs to watch live music at least a couple of times a month – compared to 2% of over 55s.

Australians enjoy catching artists at their regulars.

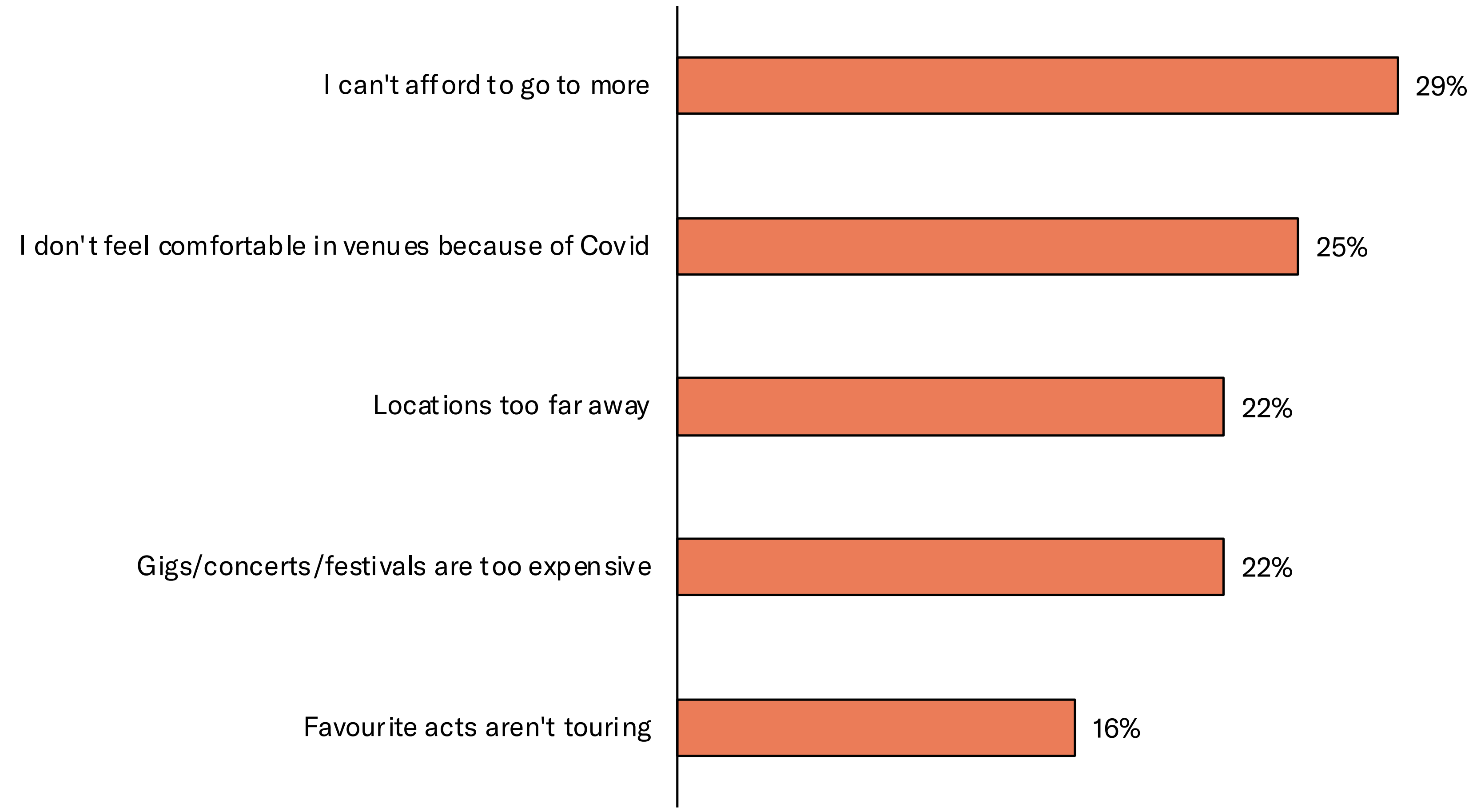
Furthermore, Bars & Clubs have a more regular attendance. Over a tenth (11%) of the Australian adult population visit a bar or club to watch music at least a couple times a month – rising to over a third (34%) attending at least a few times a year. Smaller venues, with capacities between 201 and 500 people, are the second most regularly visited – over a quarter (27%) visit at least a few times a year.

	OVERALL	16-34	35-54	55+
BARS & CLUBS	34%	53%	35%	16%
SMALLER VENUES	27%	43%	28%	12%
MID-LEVEL	22%	40%	22%	5%
ARENAS	19%	37%	20%	2%
STADIUMS	18%	35%	20%	2%
SMALL FESTIVAL	20%	37%	22%	3%
LARGE FESTIVAL	18%	35%	19%	1%

29%

I can't afford to go more

WHY DON'T YOU GO TO MORE GIGS / CONCERTS / FESTIVALS?



Barriers to show-visitation

However, the Covid-era is still dictating ticket purchase behaviour to an extent, perhaps echoing findings from Bolster's 'Ticketing State Of Play 2022' around purchase habits developed over the Covid era. The financial and psychological hangover of lockdowns means that 29% say they can't afford to go to more gigs and concerts, whilst a quarter (25%) say they don't feel comfortable because of Covid concerns. Over a fifth (22%) say that gigs are too expensive.

Similar themes emerge when seeking to understand why people don't go to more festivals. Over a third (35%) say they don't like big crowds and a quarter (25%) worry that they will catch Covid-19 at the festival. The latter point is especially true for those over 65, as a third (34%) claim to be worried about catching Covid.

The hefty prices that go with festivals are also a big turn-off for Australians, especially those in casual employment and earning less than $25,000 a year. Whilst 31% say they find festivals too expensive, 38% in casual employment and 39% of those earning under $25,000 said the same.

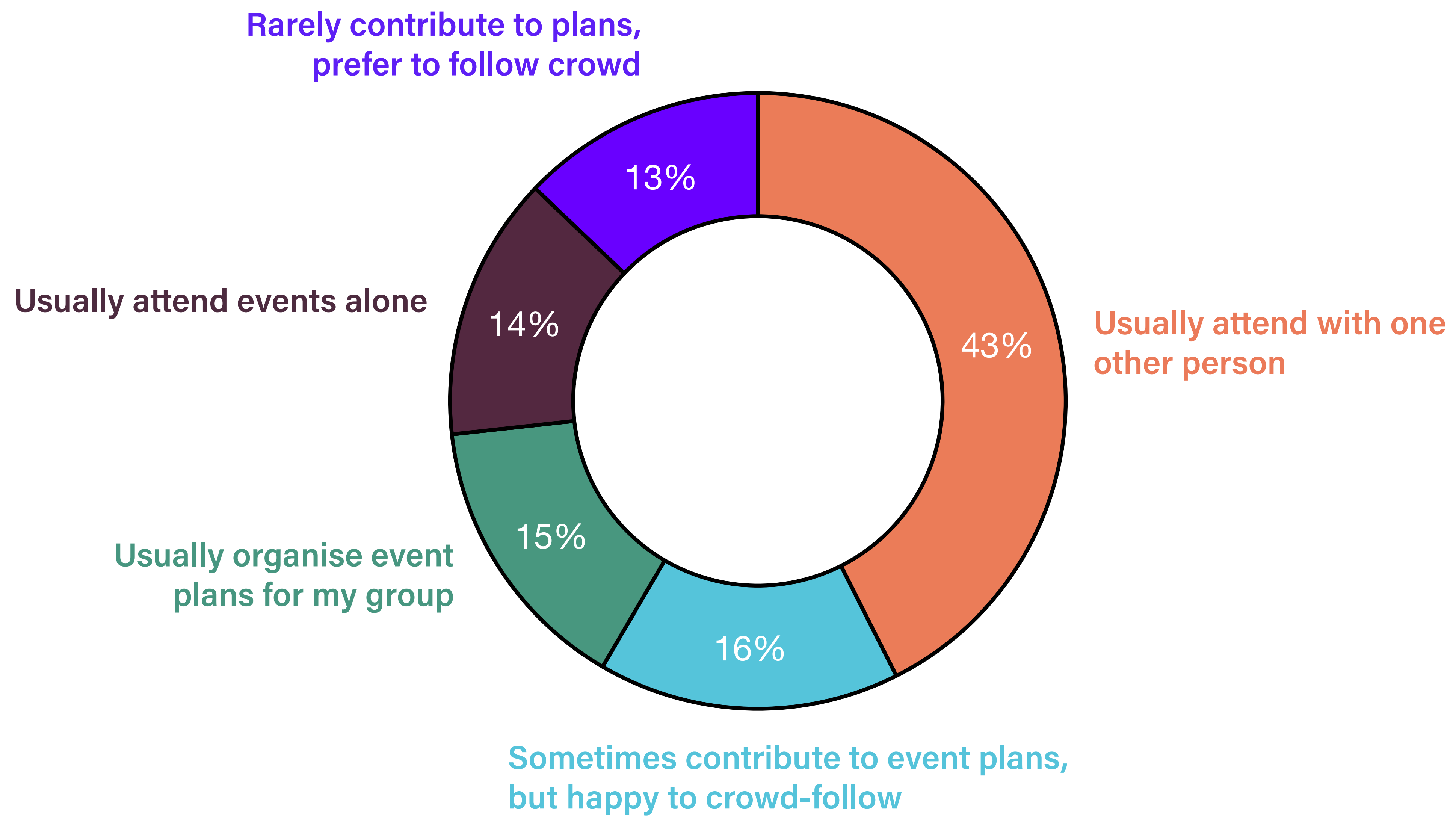
What matters most at shows?

For those who ever go to gigs or shows, the principal factors that matter most when they go are: good sound quality (36%), venue location (35%), and value for money (34%). Sound quality is especially important for those over 55, with almost half (45%) admitting as such. A ticket that has value for money, however, is the main thing that matters for younger adults under 35 (31%)

Likewise, for festivals, good quality sound is a big must have. Two fifths (41%) say that good quality sound matters to them most when attending a music festival, rising to 58% among over 55s. Value for money is also a key factor for festival-goers, as 40% say the ticket needs to feel like great value for money – rising to 51% among over 55s.

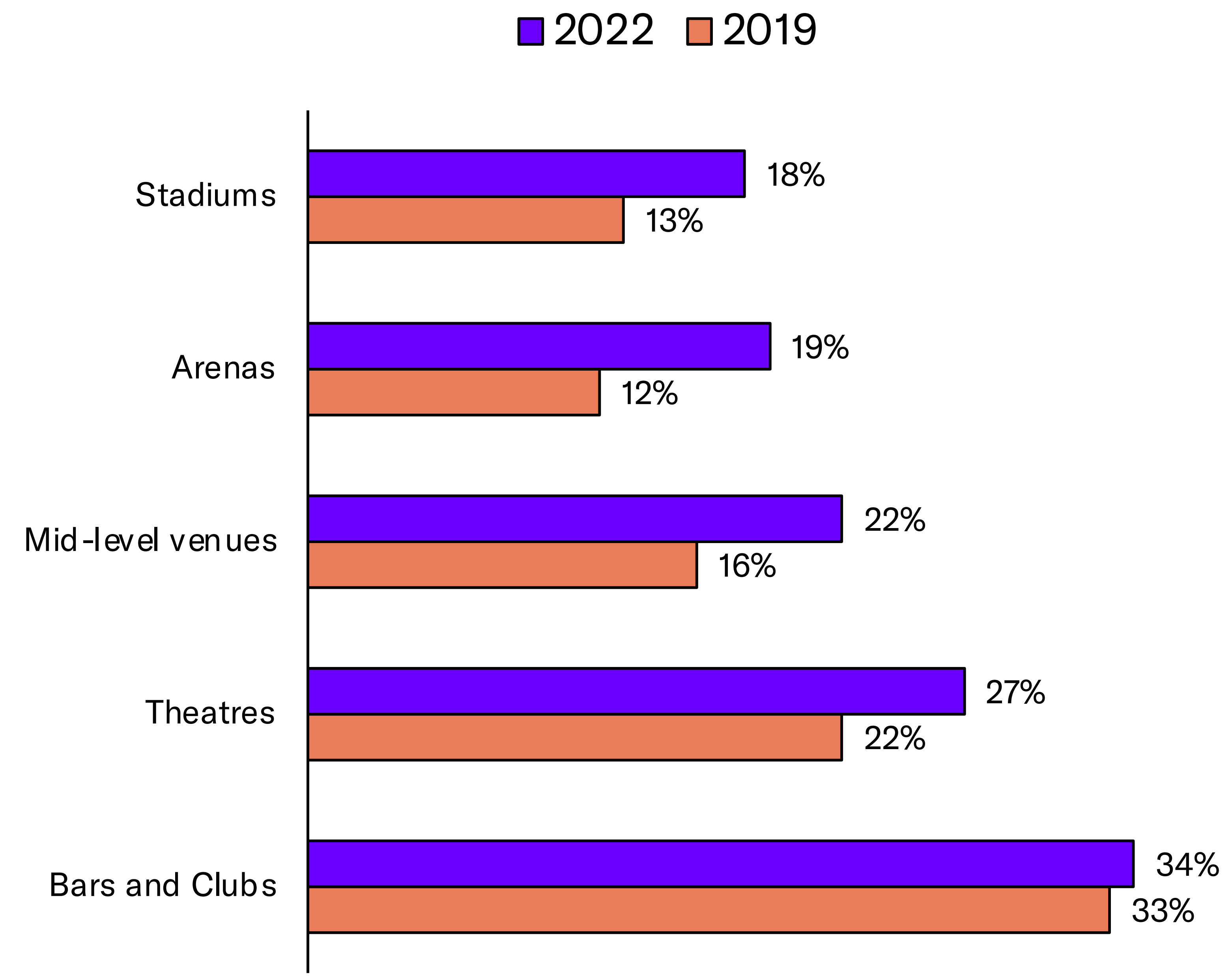
Most (43%) define themselves as the type of person who usually attends events with one other person – a friend or partner.

WHEN IT COMES TO ATTENDING EVENTS, WHAT TYPE OF PERSON ARE YOU?



Attendance is growing.

ARE YOU ATTENDING ANY OF THE FOLLOWING MUSIC VENUES AT LEAST A FEW TIMES A YEAR?



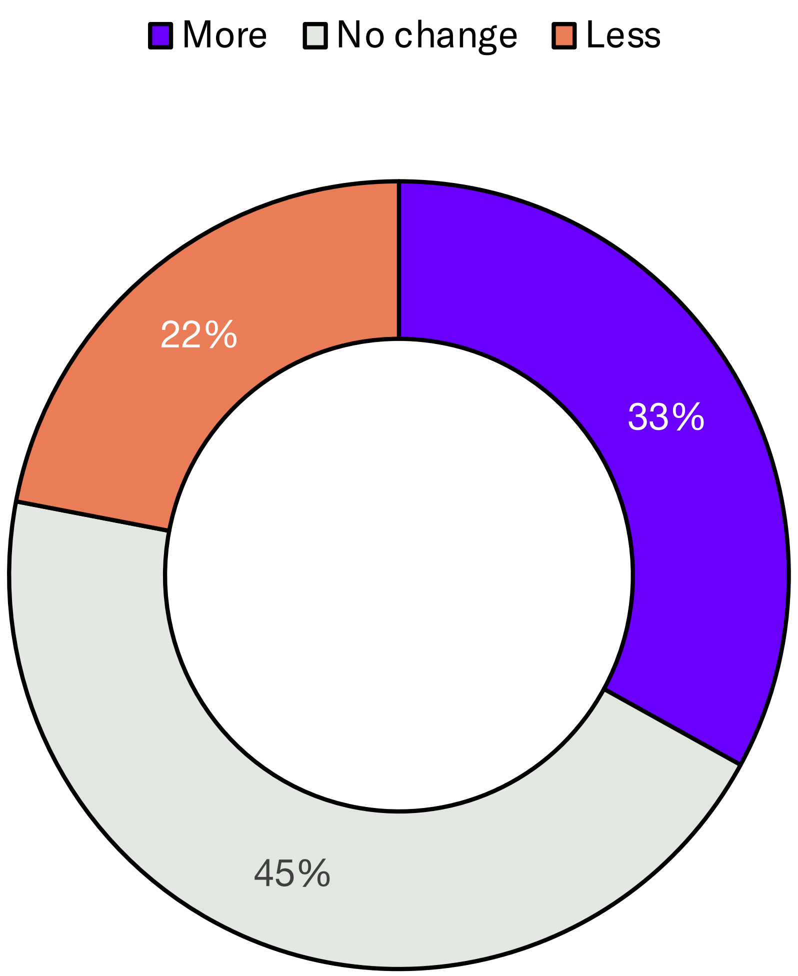
Live music: a 3 year trend

Despite a pandemic that shut down live music attendance for months and months, it appears that live music has had a post-pandemic boom across every venue size. Asked to consider how often they went to spaces to see live music, 34% said they visited bars and clubs at least a few times a year, up a point from 2019's figures. It also appears that any reservations around large crowds aren't cutting through in a damaging way, as a fifth (18%) say they are visiting stadiums at least a few times a year to watch music – up from 13% three years ago.

POST-PANDEMIC BEHAVIOUR

Overall music spend down on 2019 levels and still recovering.

OVERALL SPEND (VS. PRE-PANDEMIC)



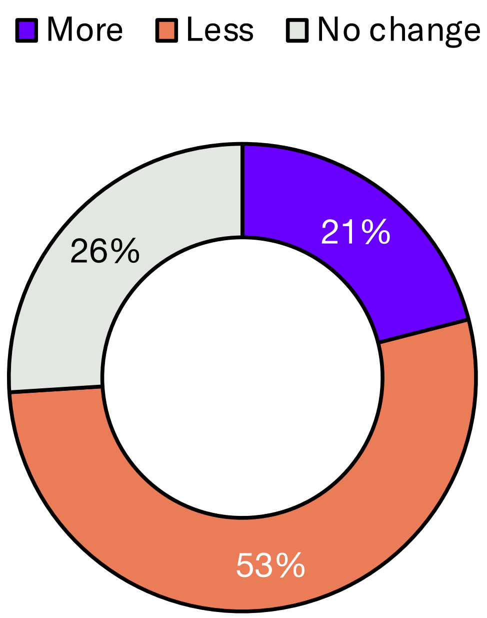
NET CHANGE

-11%

We have been through the most drastic upheaval of society and behaviour since the Second World War in the last 2 years. Whole routines and ways of life had to change immeasurably. Now, we are shifting 'back' to a new normal, the things we used to do without thinking, are less normalised.

Recorded music spend is up (from 2019), live music and merch are down.

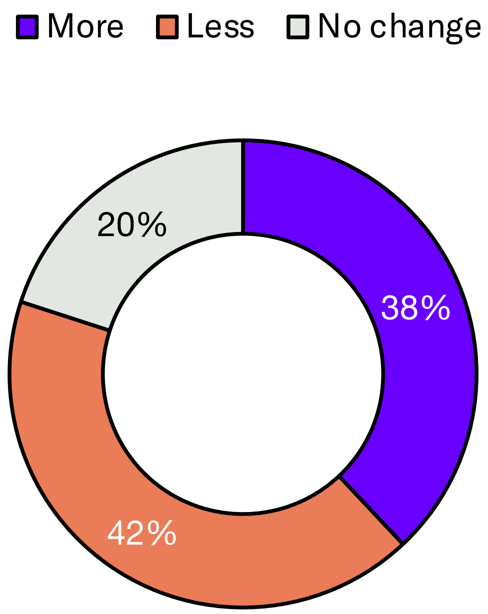
RECORDED MUSIC SPEND



NET CHANGE

+5%

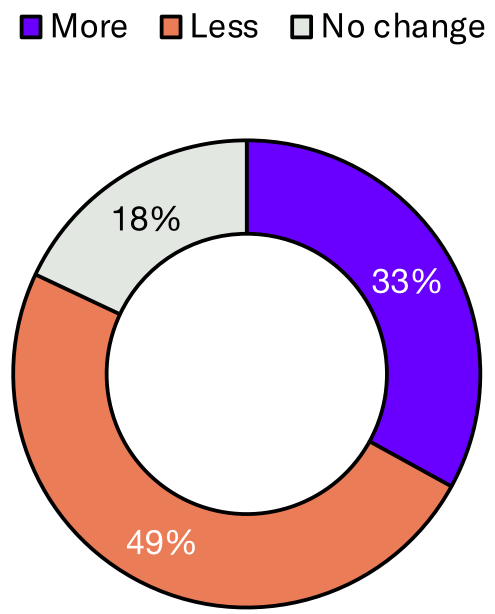
LIVE MUSIC SPEND



NET CHANGE

-18%

MERCHANDISE SPEND



NET CHANGE

-15%

Our data suggests that people are completely split on the new normal. Half (49%) of Australians say their attitude towards attending events in general has changed since before the pandemic. There is a knock on effect here, where 45% say their feelings towards purchasing tickets has also changed – for a number of reasons, mainly health and economic focussed. For example, 37% of those who said their feelings had changed, said tickets are too expensive and a third (33%) claimed that they have less disposable income to spend on tickets.

Similarly, just over a half (51%) say they have concerns attending live music. This shifts up to two thirds 66% amongst over 65s. Of those with concerns, 67% cited concerns about Covid and illness in the crowds as their reason.

These behaviour changes are reflected in the purchase shifts within the music industry. Though Australians are spending slightly more on recorded music post-pandemic, significantly, much less is being spent on live, merchandise, and music overall.

PROJECT DETAILS

PROJECT NUMBER	OP19879
PROJECT NAME	Music Habits
CLIENT COMPANY NAME	Music Victoria
PROJECT MANAGER NAME	Chris Carey
PROJECT MANAGER EMAIL	chris.carey@opinium.com
SAMPLE	2,000 Australians, aged 16+
FIELDWORK DATES	21/07/22 - 28/07/22

Opinium Research is a member of the British Polling Council and abides by its rules. Under these rules we are required, when requested, to make information available from survey results that have entered the public domain. These include, but are not limited to, the name of commissioning client, fieldwork dates, methodology, size and composition of sample, and data tables showing the text of the questions asked, the order in which they were asked and the answers given to them.

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VMDO acknowledges the Traditional Owners, the Wurundjeri People of the Kulin Nation, on whose unceded land the VMDO office is situated.
We pay our deep respects to Elders past and present as well as to all First Peoples of this land.

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