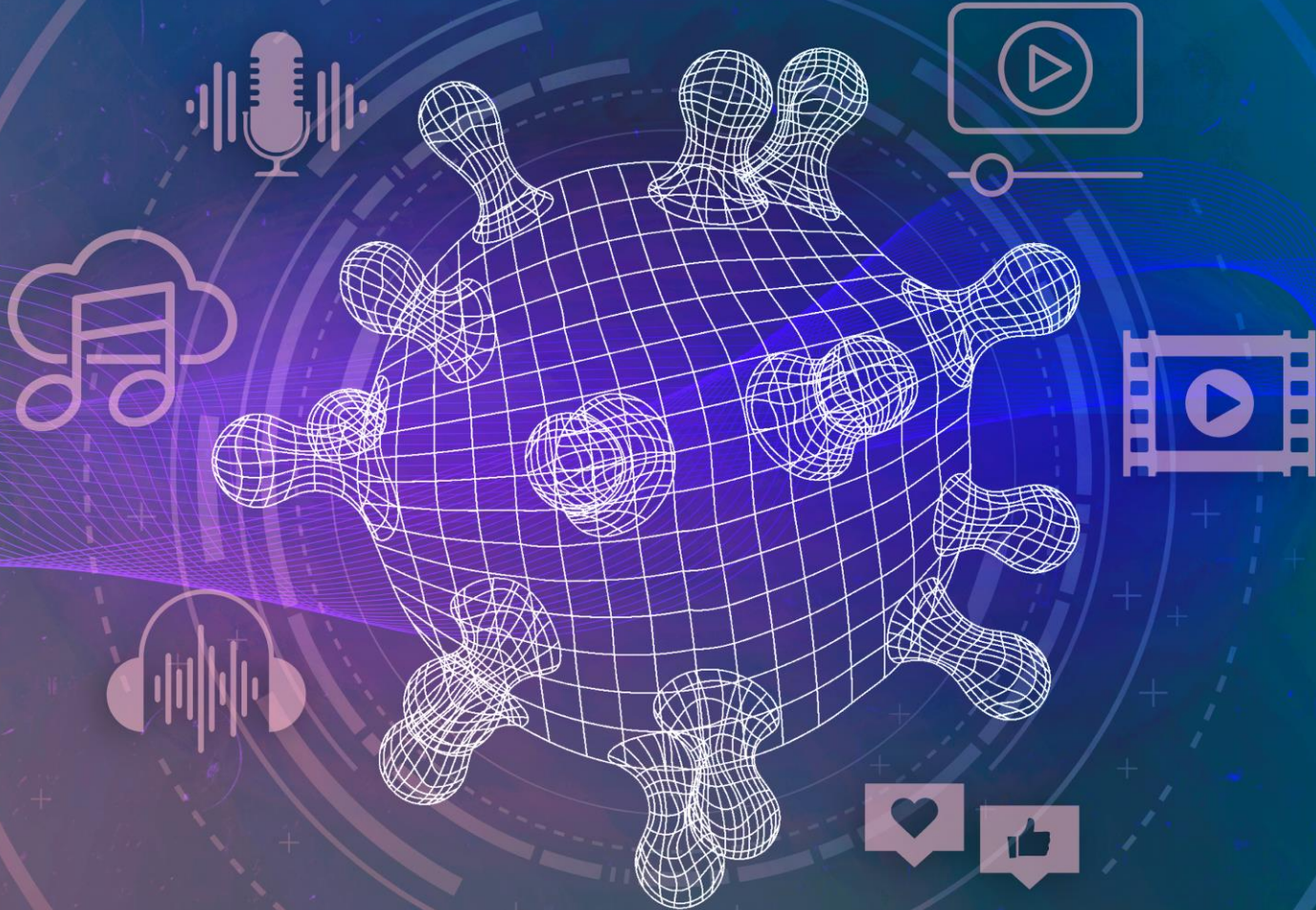


COVID-19

TRACKING THE IMPACT ON THE ENTERTAINMENT LANDSCAPE

MRC
DATA

RELEASE 11



Life Suspended, Entertainment Unrestricted



The COVID-19 pandemic has impacted economies, industries, and day-to-day lifestyles around the globe. All of this affects **how entertainment is being consumed**.

By tracking consumer attitudes and behavior in regular intervals, we aim to identify trends. 16 months into the pandemic, we can now begin to share ***year-over-year comparisons***.

Each release covers:

- ✓ COVID impact on attitudes and lifestyles
- ✓ Entertainment consumption and shifts over time
- ✓ Motivations and coping via entertainment
- ✓ Changes in subscription habits
- ✓ Impact on music consumption
- ✓ Expectations for live events
- ✓ What the music industry can do to engage consumers and support artists
- ✓ How virtual events have been embraced

Our Release 11 report further explores:

- ✓ Live stream / virtual concert time of viewership and ideal duration
- ✓ Movie engagement, including in-theater and alternative-venue attendance and intent to go
- ✓ Future live event plans for 2021-2022
- ✓ Ancillary revenue for music fans
- ✓ Importance of COVID restrictions to in-person live event attendance

If you haven't seen our first 10 releases, contact us at research_inquiries@mrc-data.com

Methodology: Survey Research



STUDY TIMING



Wave 10 data was collected **July 6th through July 16th, 2021.**

DATA COLLECTION



Online surveys using third-party panels were used to collect responses

SAMPLE SIZE



Interviews were conducted with **1,056 Gen Pop consumers** (Ages 13+) in the United States

QUOTA BALANCING



Data is **representative of the U.S. census population** including age, gender, ethnicity, and region

ADDITIONAL ANALYSIS



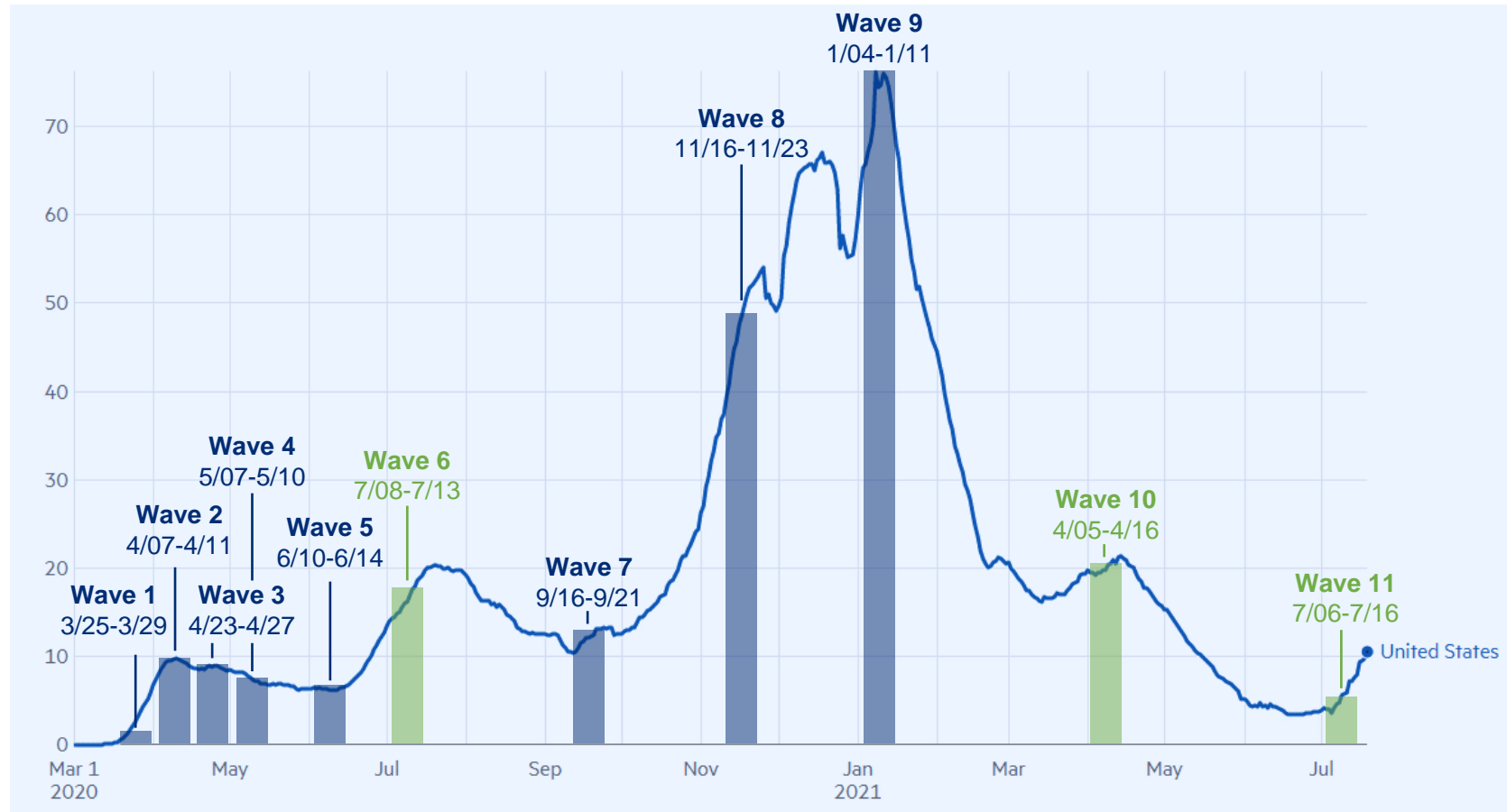
Please contact us if interested in learning about **additional or custom analyses**

Data for the COVID-19 Entertainment tracker was collected in 11 waves from March 2020 to July 2021



NEW CONFIRMED CASES IN U.S.

Seven-day rolling average of new cases (per 100k)



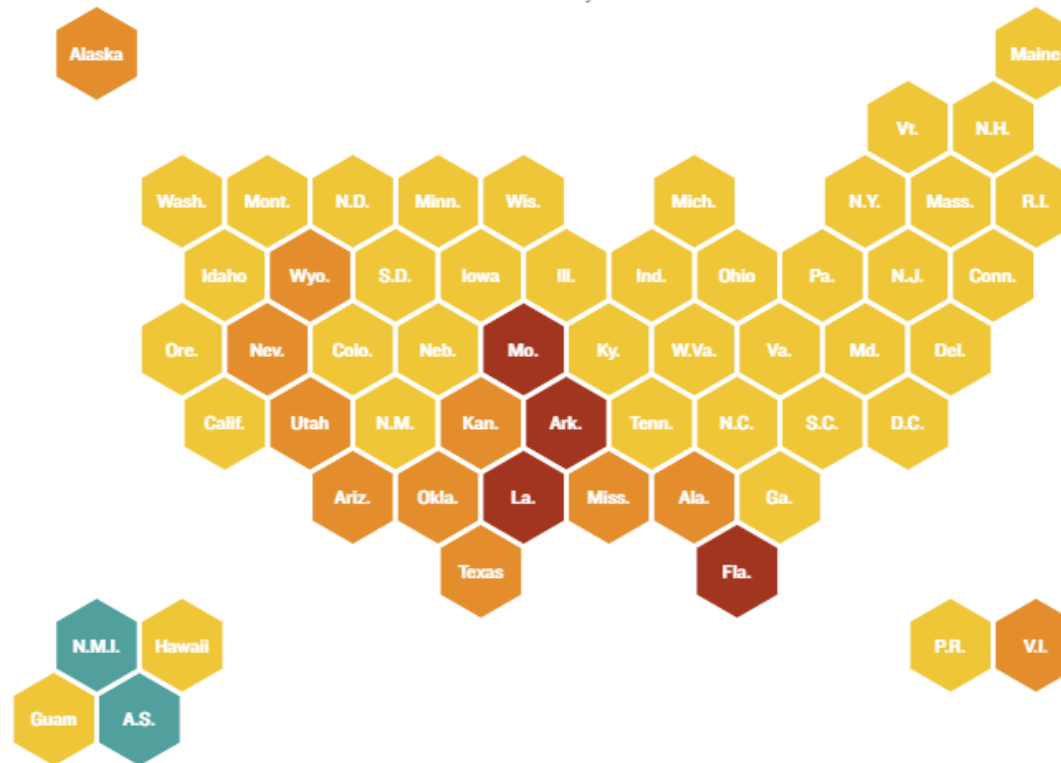
This release compares
Wave 10 vs. Wave 11
Wave 6 vs. Wave 11

Context: Regional risk levels begin to homogenate due to vaccine rollout



4 Places Are At The Highest COVID-19 Risk Level

Data as of July 18



| Red | Orange |
|--|--|
| Threshold: 25+ daily new cases per 100,000 people | Threshold: 10-24 daily new cases per 100,000 people |
| Indicates: Unchecked community spread | Indicates: Escalating community spread |
| Yellow | Green |
| Threshold: 1-9 daily new cases per 100,000 people | Threshold: <1 daily new case per 100,000 people |
| Indicates: Potential community spread | Indicates: Close to containment |



COVID-19 Entertainment Tracker Release 11: *Sneak Preview*

How do people continue to cope with the ongoing pandemic?



-4% 

**Self-isolated /
limited to home
& surrounding
areas**



+5% 

I miss live events

  (Statistically significant from Wave 10 at 90%)

Are consumers heading back to the theaters?



MOVIE THEATER LOCATIONS



-20% 

In car / drive-in theater



+7% 

Watching movies in a theater

  (Statistically significant from Wave 10 at 90%)

Have entertainment and subscription habits changed?



MORE TIME SPENT WITH – TOP ACTIVITIES



-14% 

Short form videos



+17% 

Time spent with **Audiobooks**

  (Statistically significant from Wave 10 at 90%)

How has COVID-19 impacted music consumption?



Vinyl LP sales are up for the first time since 1991 (MRC's initial tracking start)

+108%

AUDIO STREAM SHARE CHANGES BY GENRE OVER THE PAST 8 WEEKS



-2% 

R&B/HipHop stream share



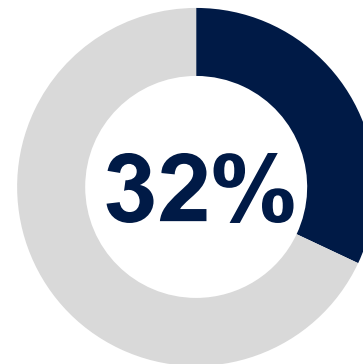
+1% 

Country stream share

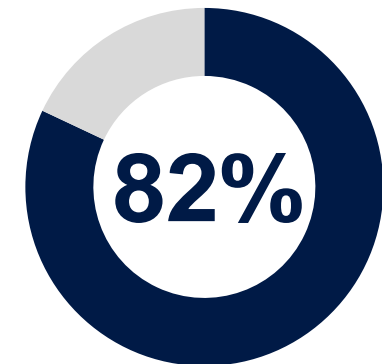
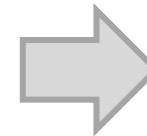
What do live events look like moving forward?



LIVE EVENT / MUSIC FESTIVAL PLANS



Purchased in-person tickets to an upcoming **live music event** in the past month



One or more of those tickets are for a **music festival** taking place this year

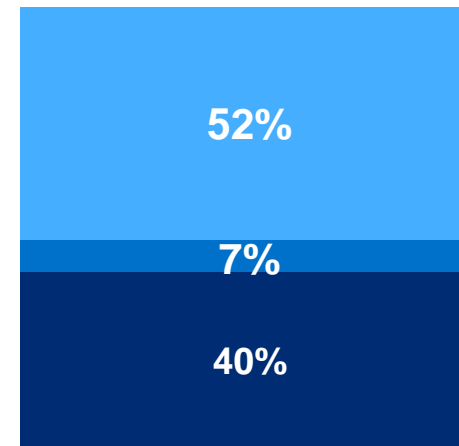
↓↑ (Statistically significant from Wave 10 at 90%)

How have virtual events been embraced?



71% I enjoy **seeing an artist's home or family**

VIRTUAL MUSIC EVENTS POST-PANDEMIC



- More than an in-person ticket
- The same as an in-person ticket
- Less than an in-person ticket

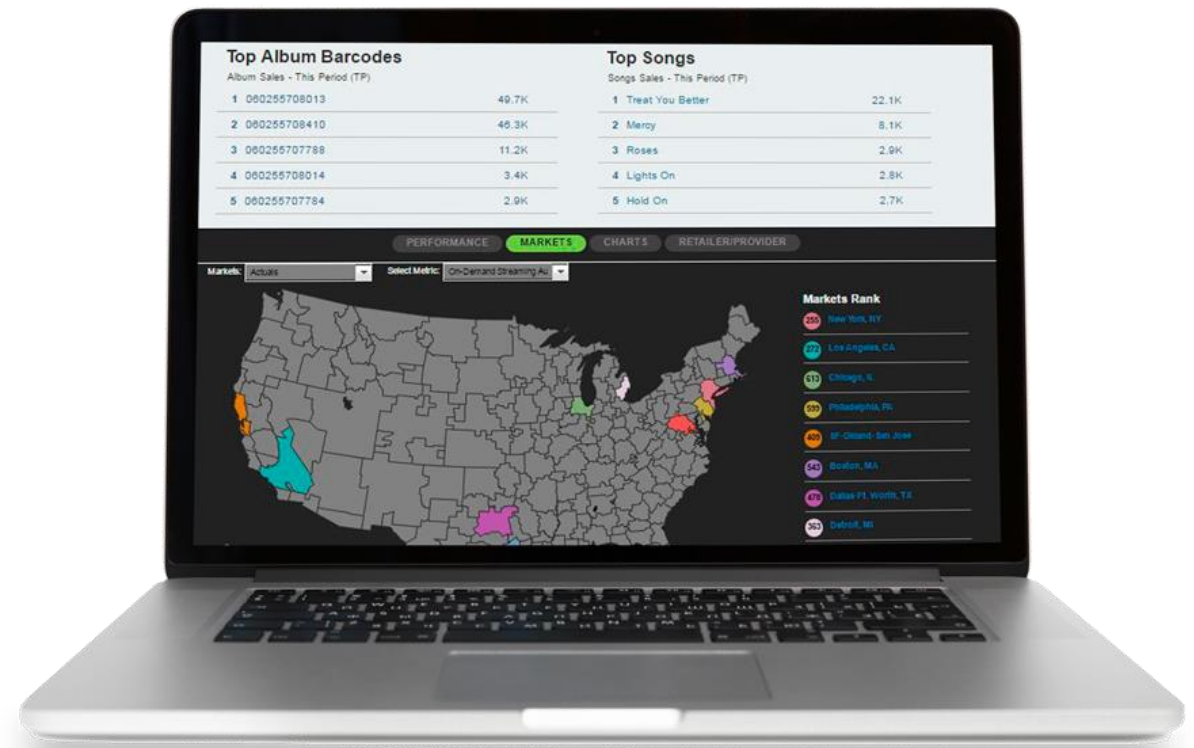
Expected cost of virtual live streamed music event

Methodology: Music Consumption Data



To supplement our analysis, consumption data from **Music Connect** was included to show the impact of COVID-19 on music streams and sales by market week over week.

Music Connect is a comprehensive measurement and analytics platform that provides music streaming, airplay, and sales data for artists, albums, and songs.



Methodology: Significance Testing



Data between waves is tested for statistical significance at **90% confidence**.



A **significant increase** from Wave 10 (or Wave 6) to Wave 11 is shown by a green arrow pointing up.



A **significant decline** from Wave 10 (or Wave 6) to Wave 11 is shown by a red arrow pointing down.

If no arrow is shown, then the **data is flat** and there is no significant difference between waves.

Please note that **Music Connect** data is behavioral and not survey-based and therefore not tested for significance.



Methodology: Indexing to Gen Pop



Throughout the report there may be references of indices to Gen Pop as noted by *Italics in parenthesis*, for example *(100)*.

Indices are calculated as % of the sample group / % of Gen Pop.

Low Index
(80 or below)

Average
(Around 100)

High Index
(120 or above)



An index of 80 means that this group is 20% less likely than Gen Pop to react in a certain way

An index of around 100 means that the sample group is in line with the general population

An index of 120 means that this group is 20% more likely than Gen Pop to react in a certain way

Beyond the topline insights offered here, the full Release 11 report further explores:

- ✓ As life continues forward, a look at how entertainment habits are changing
- ✓ What live music events look like now and for the rest of 2021
- ✓ Movie engagement and the return to in-theater experiences
- ✓ Importance of wellness and top platforms and motivations for engagement
- ✓ Trends in music consumption and the type of music listeners gravitate towards
- ✓ A full battery of questions on virtual events, likelihood to pay, and future interest
- ✓ Importance of music artists
- ✓ Opportunities for brands to win favor among consumers
- ✓ Key insights by region and among households with kids

To purchase the full Release 11 report or commission analysis to gain deeper insights into how the coronavirus continues to affect the music and entertainment landscape, please contact us at data.research@mrcentertainment.com