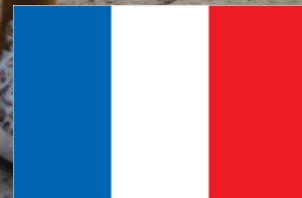


France Music 360 2021: *Sneak Preview*

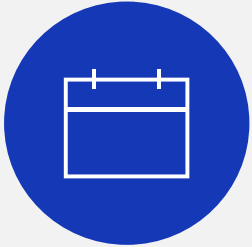
MARCH 2021





METHODOLOGY: FRANCE MUSIC 360 2021

STUDY TIMING



France Music 360 data was collected March 9, 2021 through March 14, 2021.

DATA COLLECTION



Online surveys using third-party panels were used to collect responses. The study was available in French.

SAMPLE SIZE



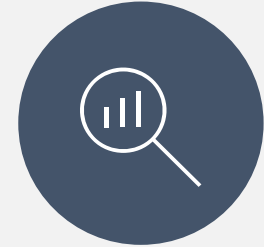
Interviews were conducted among a total of 1,638 French Gen Pop (Ages 13+) with additional 58 teens Ages 13-17.

QUOTA BALANCING



Data is representative of French population including age, gender.

ADDITIONAL ANALYSIS



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



INSIGHT CATEGORIES

2021 MUSIC OVERVIEW & TRENDS

- Time spent with music
- Importance of entertainment interests
- Music listening locations/activities
- Music listening by format
- Share of music time by formats
- Music discovery sources
- Annual music spend

ROLE OF TECHNOLOGY

- Top factors for music device selection
- Device ownership
- Top devices for music listening
- Technology & music discovery

MUSIC STREAMING ENGAGEMENT

- Top music streaming service usage
- Free vs. paid subscriptions
- Streaming service satisfaction
- Sources for song/artist identification
- Barriers for subscribing
- Future subscription opportunity
- Top streaming service features

GENRE & LANGUAGE

- Genre listenership and fanship
- Location and language preferences

FORMAT PURCHASING

- Past purchasing
- Purchase intent by format
- Format purchase considerations

PLAYLISTING

- Playlist importance
- Weekly playlist usage
- Post-playlist actions
- Music search topics



INSIGHT CATEGORIES (Con't)

LIVE STREAMED PERFORMANCES

- Live streamed music event attendance
- Top platforms used
- Top attendance motivators
- Discovery & time of ticket purchasing
- Attitudes
- Paying for attendance
- Future interest in paid events
- Barriers for live streaming

MUSIC COMPETITION SHOWS

- Competition show viewership
- Impact of competition shows

HEALTH & WELLNESS

- Wellness activities/services
- Top wellness platforms
- Wellness goals

GEN Z & MILLENNIALS

- Insights for Gen Z and Millennials' engagement with music across key topics, including how they compare to Gen Pop for behaviors, preferences, and attitudes

LIVE MUSIC EVENTS

- Live event attendance
- Discovery & time of ticket purchasing
- Likelihood of attending future events

SOCIAL MEDIA & VIDEO CLIP SITES

- Social media & short video clip site usage
- Top music activities on sites
- Music/artist discovery on sites

BRAND ACTIVATIONS

- Top brand activations

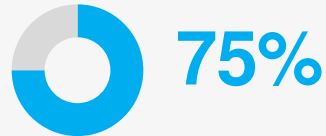


MUSIC IS A RELIABLE SOURCE OF COMFORT FOR CONSUMERS

As consumers spend more time inside their homes during pandemic, they turn to music.

MUSIC LISTENERSHIP

Among Total Respondents



Of general population in France
engages with music

TOP LOCATION FOR MUSIC

Among Music Listeners



91%

Listen to music
at home

ACTIVITY IS IMPORTANT/EXTREMELY IMPORTANT

Among Total Respondents



Music
51%



Music Videos
24%



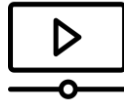
**Live streamed/
virtual music events**
23%

MORE LISTENERS EXPLORE STREAMING



29%  +7%

Of Music Listeners
**discover songs and
music artists** on audio
streaming services

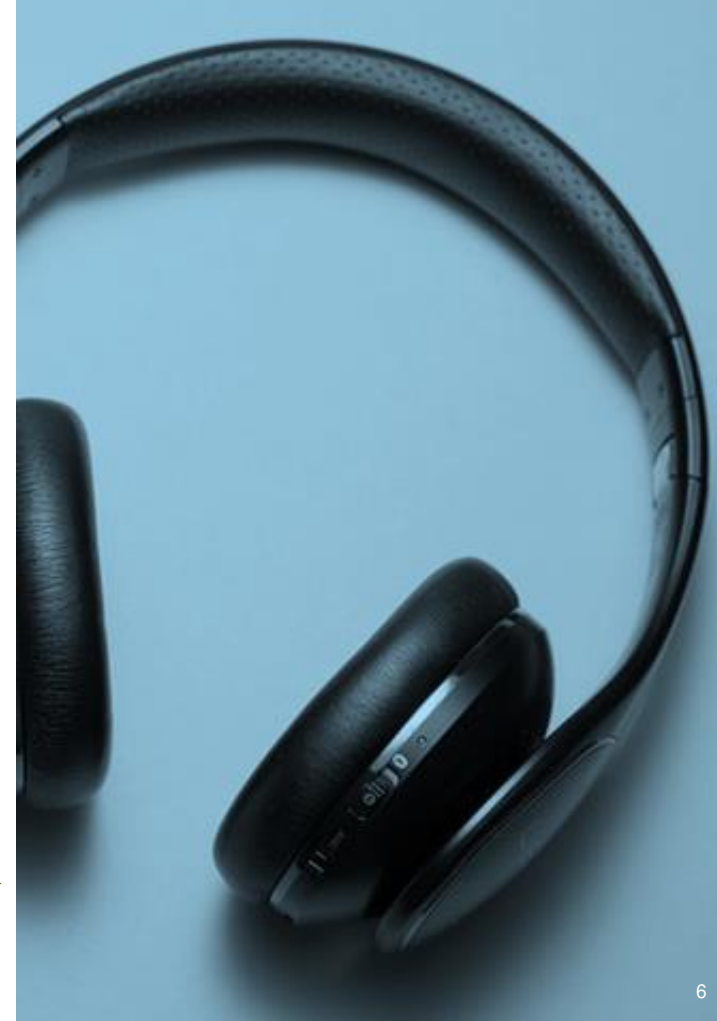


35%  +4%

Of Music Listeners
stream **music videos** in
a typical week



(Statistically significant from 2020)





MOST STILL RELYING ON STREAMING FOR FREE

Ample opportunity to win over new paid subscribers.



73%

Of Music Listeners
stream music through a
**free music streaming
service**



10%

Of Music Listeners
currently **pay for a music
streaming service**
subscription

IN-HOME, QUALITY TECH ACCEPTANCE RAMPING UP

DEVICE USAGE FOR MUSIC

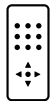
Among Music Listeners



12% Smart Speakers



11% Smart TVs +3%



8% Internet-to-TV streaming device +5%

(Statistically significant from 2020)

#1 FACTOR FOR MUSIC DEVICE SELECTION

Among Music Listeners Who Use Devices Weekly For Music

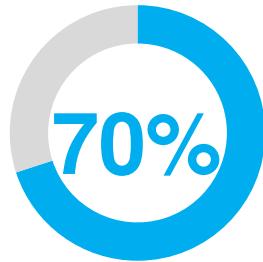
63% HIGH QUALITY AUDIO



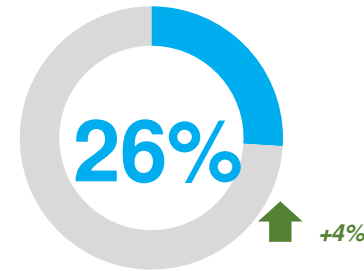


SOME ARE YEARNING FOR THE PAST ...

Especially during a time of a pandemic, some listeners are rediscovering their “old favorites.”



Of Music Listeners agree that *“I enjoy listening to music from **past decades**”*



Of Music Listeners consider ***nostalgia*** when choosing between music formats for purchase



... AND ENJOY EXPANDING COLLECTIONS

PAST PURCHASING (Past 12 Months)

Among Music Listeners



39%

Physical formats



26%  +3%

Digital tracks/albums

(Statistically significant from 2020)  



MUSIC IS GETTING “SOCIAL”



20%

Of Music Listeners
discover music on
Social Media Sites



14%

Of Music Listeners
discover music on
Short Video Clip Sites

TOP MUSIC ACTIVITIES ON SOCIAL SITES

Among Social Media/Video Clip Site Users

#1

Listen to music your
friends post

#2

Watch videos about
music artists

#3

Follow music artists or
fan pages



LIVE MUSIC FANS CAN'T WAIT TO GO BACK, BUT CAUTIOUS

WOULD RETURN IF....

Among those planning on attending live music event

#1



Will not attend if COVID conditions do not improve

#2



Only if safety precautions are in place

#3



Once the vaccine is widely available/herd immunity is achieved

#4



Regardless of COVID risk

53%



Plan on attending a live in-person music event in the coming year



STILL TESTING THE WATERS WITH LIVE STREAMED EVENTS



33%

Of Gen Pop have **live streamed a music performance** in that past 12 months

34%

Of Live Streamers **have paid** for at least one of the live streamed music performances

52%

Of Gen Pop would **still be interested** in live streamed music performances and events **once in-person events return**

Beyond the topline highlights offered here, the full France Music 360 report explores:

- The music landscape in France and how it's changed over the last year due to the pandemic
- Key insights around how this audience engages with music, including format preferences, discovery, occasions, time and money spent on music
- Genres and language preferences
- Role of technology in music listening today
- Online music streaming usage, including playlisting and intent to subscribe
- Entertainment, including music competition shows, live music events, and live streaming engagement
- Social media and short video clip usage for music content
- Key findings among Gen Z and Millennials
- Top brand activations

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