

&Andd

 Nostalgic sounds and new platforms
P8

 Young populations dominate audio creation
P28

 Music has always been more than just entertainment
P12

 How are you doing?
P40

2022



Audiomonitor

Consumer insights from 40 nations

Issue number one

P8

Consumption

Nostalgic sounds, new platforms. An industry interconnected.



P20

Ask the expert

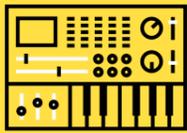
Ben Jones answers our questions.



P28

Creation

Young populations dominate audio creations.



P34

Values

Music has always been more than just entertainment.



P40

Wellbeing

How are you doing?



Music is born out of vibration and vibration is born out of energy.

Every cell in the human body is made of particles, themselves made from subatomic strings of vibrating energy. No wonder that music and life are inextricably linked.

Music and my life have been inextricably linked, not just as someone who is passionate about music but as someone who has had the privilege of a career, fast approaching 40 years, researching music consumption, on a daily basis.

Over that period, my research has continually monitored the shifts and changes in audio consumption. From the advent of the CD and emergence of digital downloads to streaming services and podcasts, as well as providing market data on more than 700 recording artists.

Until now pretty much all of the music research I have been involved with has been in the form of confidential projects, usually commissioned, under NDA, by the majors, digital platforms, trade bodies and the UK Government.

Now, in 2022, as the global music industry faces both its biggest challenges and its biggest opportunities, it seems like the time is ripe to pull some threads together for the industry as a whole – an industry which needs to keep up with the pace of change, if it is to stay relevant and viable.

Audiomonitor sets out to inform the global music industry of the significant and rapidly changing landscape of music and audio consumption. The growth in content creation, and the quantum shifts in music discovery, distribution and live experience, herald both the challenges and the opportunities.

A key outtake from the data which follows is that the global music economy is fast becoming both creator and values led. For monetisation to be optimised the industry needs to keep this optic at the fore.

Never has there been a greater need for robust, joined-up consumer data – and in real time.

David Lewis
Founder & CEO AudienceNet

THE PODCAST BOOM
SEE P16

Some stats to get you started

► Sometimes you want the highlights before you get the lowdown. Here's our top stats across 40 nations around the world surrounding four key areas: how people consume and create music & audio, what they value, and how they feel.

Consumption

39% of 16-24-year olds like music from before they were born.

1 in 4 Americans listen to podcasts weekly.

58% of respondents like listening to their own playlists.

1 in 5 people in the UK own a smart speaker.

13% of our sample had watched a live-gaming stream in the last month.

6% of the total sample are defined as gaming fanatics. *This is equivalent to 78.2m people worldwide.*

Creation

13% of our sample had watched a live-gaming stream in the last month.

80% of the countries with the youngest populations, feature within top 10 for proportion of musicians/audio creators.

32% of TikTok Creators in Thailand consider themselves musicians or audio creators.

Values

26% of the global sample love to support local artists or go to local gigs.

33% of 25-34-year-olds listen to music with the purpose of connecting with their culture.

47% of the global sample believe that music can be a powerful agent for change in society.

Wellbeing

50% of people listen to music to relax or help them sleep.

Nearly half of the global sample listen to music to exercise.

42% of the total sample listen to music to feel creative.

I follow the latest technology trends and news



Nostalgic sounds, new platforms. An industry interconnected.

► When it comes to music, people love songs from the past but prefer listening on technology from the present. When it comes to podcasts and gaming, they have gone from niche hobbies to being more and more intertwined with video and music content.

ANDD discusses what audio we are consuming and where...

In recent years, the way we consume music and audio has been completely turned on its head. Some transformations were to be expected, like swapping physical CDs and Vinyl for online streaming. Others came as more of a surprise. Who would have predicted that *Running Up That Hill* by Kate Bush would reach #1 in 5 countries in 2022 thanks to a TV series nostalgic for the 1980s? Or that gaming would have such a far-reaching impact on music discovery? One key transformation is the rise of video platforms. Podcasts increasingly combine their traditional audio content with video content, and the streaming service attached to the world's largest video-sharing platform, YouTube Music, is on track to knock Spotify off from the top spot as the most popular site for music streaming. How we consume music and audio may be changing drastically, but it's just as important to our lives as ever.

SEEKING SOLACE IN THE SOUNDS OF THE PAST

As noted by those that have studied its content and effects, nostalgia – regarded by *Svetlana Boym* as “yearning for a different time” – has



become a defining feature of the human experience in the modern age. It is no wonder then, that we seem to harbour love for older music. The psychological benefits of listening to sounds of the past during periods of difficulty are widely recognised. An analysis of listening patterns on Spotify by *Dr Timothy Yu-Cheong Yeung*, later relayed in *The Guardian*, demonstrates that millions of us sought refuge in songs produced decades ago during lockdown.

Whether connected to not wanting to face up to a messy and uncertain future, or simply a desire to relive intertwined memories, people of all ages across

many countries, are continuing to indulge in music that was produced during their early years, and even before they were born. A third of 16–24-year-olds like 90s music, with the older members of this demographic born only two years before the decade ended. The same goes for 34–45-year-olds with regards to 80s music, and 55–64-year-olds with 50s, 60s & 70s music. More to the point, only a quarter of the total sample prefer listening to music that has just come out. Preference for new music is particularly apparent in the Middle East, with three of the four countries from the region making the top 10 for this metric.

I worry I spend too much time on my smartphone



OASIS & NEW MEANING



Don't Look Back in Anger requires no introduction. Released by *Oasis* in 1996, it claimed many accolades from “most explosive chorus” to greatest song of the 1990s.

In recent years though, the anthem that sees a woman eschewing anger and regret as she looks back on her life, has taken on newly powerful meaning. When the Manchester Arena was bombed in May 2017 leading to the deaths of twenty-three people, mourners at a local vigil broke out in a spontaneous chorus, proceeding to attach a new layer of significance to the song that elevates remembrance.

Top 3 genres by age

16-24	45-54
1. HIP-HOP / RAP 39%	1. 80S 59%
2. 90S 32%	2. 90S 56%
3. ROCK 32%	3. ROCK 44%
25-34	55-64
1. 90S 43%	1. 80S 62%
2. ROCK 37%	2. 50S, 60S & 70S 49%
3. HIP-HOP / RAP 34%	3. 90S 46%
35-44	
1. 90S 53%	
2. 80S 42%	
3. ROCK 41%	

39% of 16-24-year-olds like music from before they were born.

“ ”
I PREFER TO LISTEN TO MUSIC THAT'S JUST COME OUT.



TOP 40

1	Thailand	42%
2	Turkey	41%
3	Vietnam	39%
4	Egypt	39%
5	Saudi Arabia	36%
6	Romania	34%
7	UAE	34%
8	Philippines	33%
9	Indonesia	27%
10	Poland	25%
11	South Africa	25%
12	Brazil	24%
13	Hong Kong	24%
14	Mexico	24%
15	Malaysia	23%
16	Singapore	23%
17	Italy	22%
18	USA	21%
19	Israel	21%
20	Taiwan	21%
21	Belgium	20%
22	Greece	19%
23	France	19%
24	Spain	19%
25	Australia	19%
26	Canada	18%
27	South Korea	18%
28	Argentina	17%
29	Germany	17%
30	Portugal	17%
31	Ireland	16%
32	Netherlands	16%
33	Switzerland	16%
34	UK	16%
35	Japan	15%
36	Sweden	15%
37	New Zealand	15%
38	Austria	14%
39	Denmark	14%
40	Czech Republic	12%



I OWN A SMART SPEAKER.



TOP 40

1	UK	22%
2	Ireland	21%
3	USA	19%
4	Italy	18%
5	Canada	17%
6	Spain	16%
7	Mexico	14%
8	Australia	13%
9	Sweden	10%
10	Netherlands	10%
11	Denmark	9%
12	New Zealand	9%
13	France	9%
14	Vietnam	9%
15	Germany	8%
16	Singapore	8%
17	Austria	8%
18	Brazil	8%
19	Turkey	8%
20	Taiwan	7%
21	Belgium	7%
22	Hong Kong	7%
23	UAE	6%
24	Israel	6%
25	South Korea	6%
26	Switzerland	5%
27	Malaysia	5%
28	Poland	5%
29	Indonesia	5%
30	Portugal	5%
31	Greece	4%
32	Romania	4%
33	Saudi Arabia	4%
34	Japan	4%
35	South Africa	4%
36	Philippines	4%
37	Thailand	3%
38	Egypt	3%
39	Argentina	3%
40	Czech Republic	3%

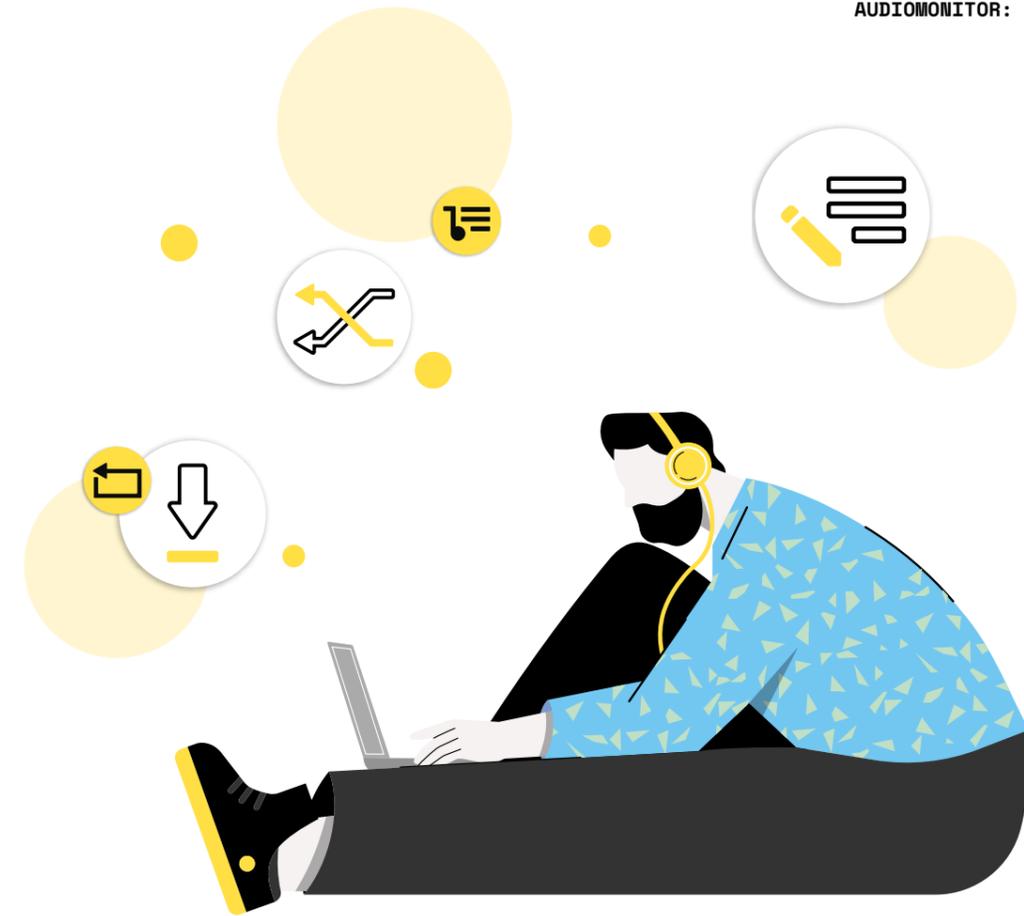
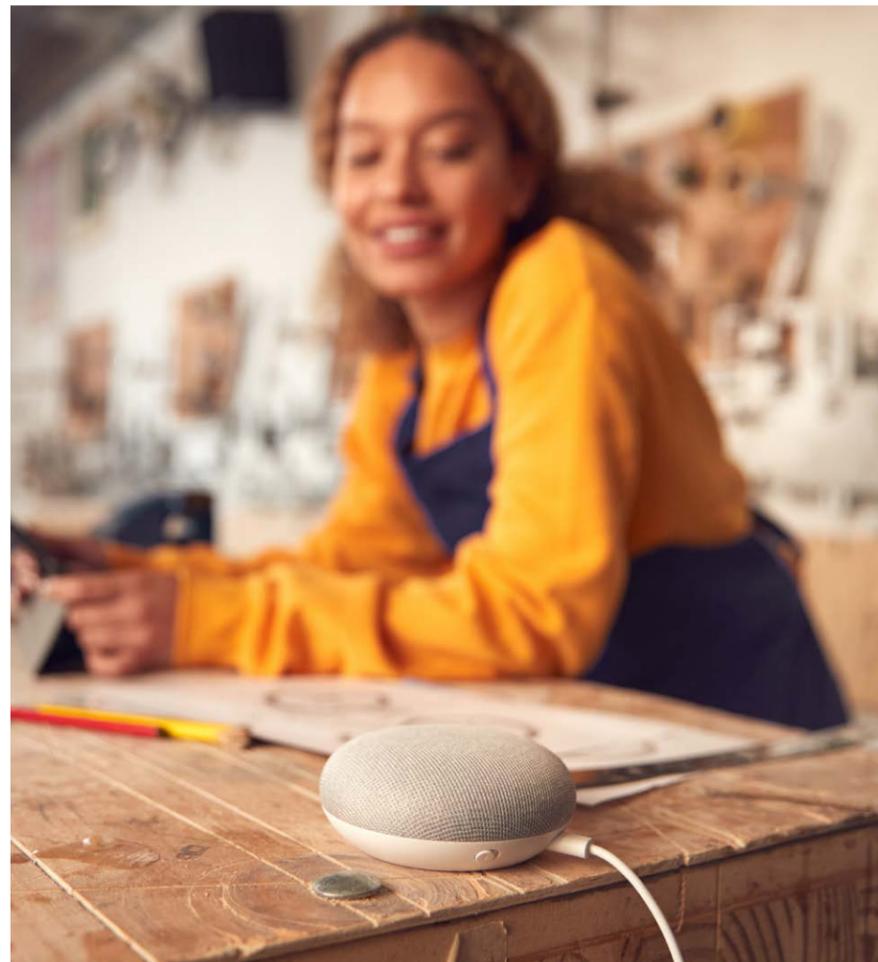
OLD SOUNDS THROUGH NEW TOOLS

The popularity of old music does not equate to the popularity of old modes of listening. Less than one fifth of the total sample claimed that they most liked to listen to music via CD or Vinyl, and only slightly more most like listening to music on the radio. Unsurprisingly, both modes of listening are more popular with older age groups than younger age groups. However, one new mode of listening that older generations are just as keen on, is via smart speakers. 1 in 10 respondents now own a smart speaker and this proportion remains around this level across every age group. This is equivalent to 129.4 million people, up from 79.5 million people (6%) this time last year. People in the UK especially love saying "Hey" to Alexa/ Google/ Siri as they listen to music and audio, with over 1 in 5 people in Britain owning a smart speaker.

In the age of the streaming service, the playlist is king. Most people prefer to take advantage

1 in 5 people in the UK own a smart speaker.

of the choice and autonomy that streaming has to offer, with nearly twice as many respondents preferring to listen via their own playlists than those produced by streaming platforms. Younger people are more likely to like the algorithmic playlist, perhaps by virtue of having spent a greater proportion of their lives interacting with the services that have revolutionized music consumption. So, whilst Gen Z and Millennials love nostalgic tunes that came out when they were toddlers, instead of popping on a CD, they opt for playlists like Spotify's "Born in the 90s", with the description, "Takeshi's Castle, Tracy Beaker and Pokémon, this one's for you!".

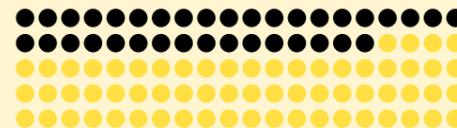


Older generations are bigger fans of CD/Vinyl

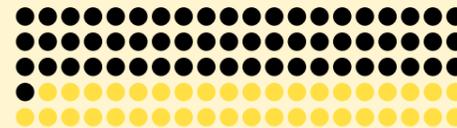


STATS AND THAT

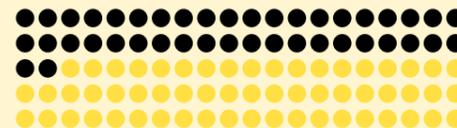
Different types of music are popular in different countries. Here are the countries that came out on top for the highest proportion of fans of: remixes/ covers; soundtracks; new music; and less well-known musicians...



34% of people in the Philippines most like listening to remixes/ covers



61% of people in Turkey like listening to soundtracks of their favourite movies or theatre shows



42% of people in Thailand prefer music that has just come out



38% of people in Portugal mainly like listening to artists/ bands that are less well-known

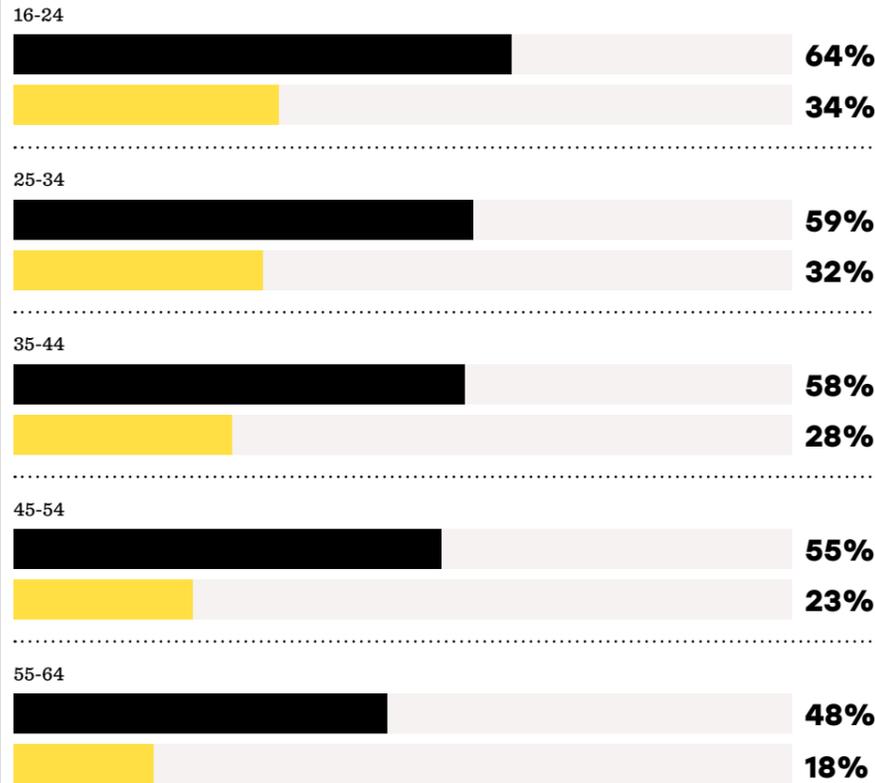
STREAMING HAS CHANGED HOW WE LISTEN

With almost every song imaginable at our fingertips, it's no wonder that streaming has changed the way we listen to music and audio. Streaming platforms offer consumers access to sounds from around the world, and the ability to share everything from specific podcasts to obscure remixes with others in just one click. They have granted us the freedom to create our own playlists featuring any artist from any genre from any era, and this has become the most popular way to consume music, with 58% of respondents liking this mode of listening. But, globally, have playlists killed off albums?

The "death of the album" is a justified fear in the industry, only 23% of respondents said they most like listening to whole albums – which is half the proportion of playlist fans. Many artists grieve the effect that streaming playlists has had on album listening and lament a loss of appreciation in their attempts to curate and tell a story through their music. When she released 30 last year, *Adele* tweeted Spotify requesting the platform to discourage listeners from shuffling albums. Dutifully replying "anything for you" to one of the most popular artists in the world, the streaming service hid the shuffle option on albums soon after. With the abundance of choice on music streaming services as well as our deteriorating attention spans, getting listeners to commit to consuming albums in order and in their entirety may continue to be a struggle.

Mine or theirs?

👤 Prefer their own playlists 🏠 Prefer playlists made by platforms



& STATS AND THAT

Listening to a playlist especially created for you by you is the most popular mode of listening by a long way.



Spotify

22% have a free account



20% have a paid account



Apple Music

4% have a free account



5% have a paid account



SOUNDCLOUD

9% have a free account



2% have a paid account



50% of 16-24-year-olds are bothered by audio ads and avoid them.

→ ADS: AM I BOTHERED?

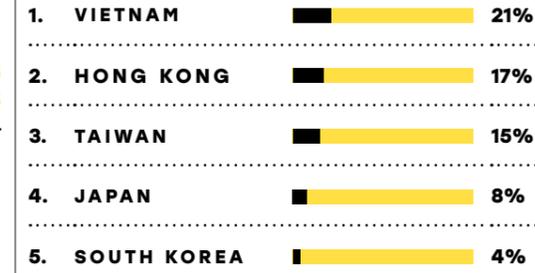
Young people are more irritated by audio ads than older people, with 50% of 16-24-year-olds saying that they are bothered by them and avoid them when they can versus only 36% of 55-64-year-olds.

Yet, finding ads annoying has not deterred younger generations from having free accounts on streaming platforms. For example, for Apple Music and Spotify, across every age group there is an even split between consumers who pay for the service and those using the free option. And intriguingly, despite SoundCloud's youthful audience, a much higher proportion of users opt for the free version over paid accounts. Maybe young people can't afford to act on their distaste for ads? Or is it that they engage with multiple platforms and not all of them can be premium?

Geographically, East Asian countries report being noticeably less bothered by ads than the global average. It therefore makes sense that in these countries, it is more common for listeners to have a free account on streaming platforms. Japan, Vietnam, Hong Kong, South Korea, and Taiwan are the five countries least bothered by audio ads. When it comes to Spotify, 4 out of 5 of these East Asian nations have double the proportion of users with free accounts versus paid ones, which bucks the global trend.

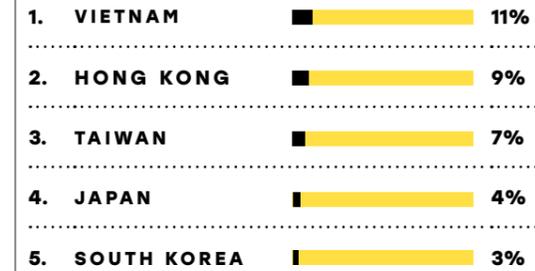
“ ”

I use a free, trial or ad-supported Spotify account.



“ ”

I use a premium, unlimited or paid-for Spotify account.



THE TOP FIVE: Countries least bothered by audio ads

- Japan
- Vietnam
- Hong Kong
- South Korea
- Taiwan

“ ”

I AM BOTHERED BY AUDIO ADS AND AVOID THEM WHEN I CAN.



TOP 40

1	Argentina	59%
2	Romania	53%
3	Poland	52%
4	Denmark	51%
5	Israel	51%
6	Greece	50%
7	Portugal	50%
8	Sweden	50%
9	Ireland	49%
10	France	49%
11	New Zealand	49%
12	South Africa	49%
13	Belgium	49%
14	Switzerland	49%
15	Mexico	48%
16	Brazil	48%
17	Spain	47%
18	Italy	47%
19	Austria	47%
20	Egypt	46%
21	Thailand	45%
22	Czech Republic	45%
23	Canada	43%
24	Australia	43%
25	UK	42%
26	Turkey	41%
27	USA	41%
28	Singapore	41%
29	Indonesia	41%
30	Netherlands	40%
31	Germany	39%
32	Philippines	39%
33	Saudi Arabia	38%
34	Malaysia	37%
35	UAE	37%
36	Vietnam	35%
37	Hong Kong	35%
38	Taiwan	32%
39	South Korea	29%
40	Japan	24%

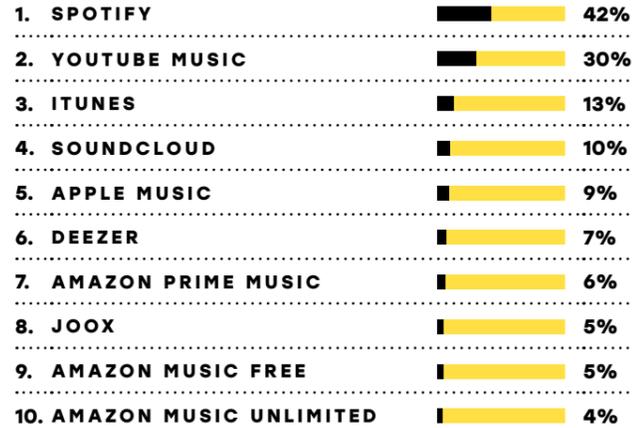
YOUTUBE MUSIC - A MAJOR PLAYER

Despite being one of the youngest streaming services out there (established in 2015), YouTube Music has significant reach, with 3 in 10 respondents having used it in the past month, globally. Its popularity is consistently high amongst every generation, and as consumers get older, the gap between YouTube Music and Spotify tightens with YouTube almost taking the top spot amongst 55-64-year-olds where 19% of people use the platform, closing in on the 21% who use Spotify.

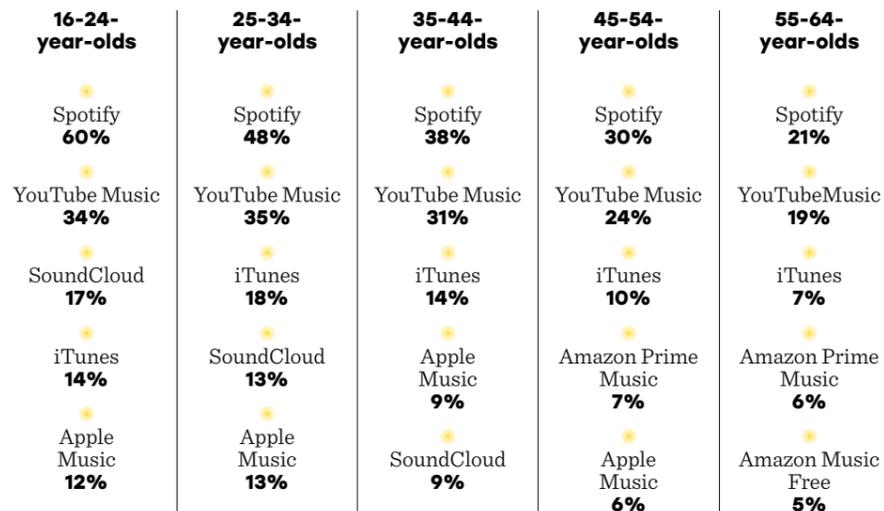
In November 2022, YouTube announced that the service had reached a staggering 80 million paid subscribers, up from 50 million in 2021. The appeal of the platform is understandable as, in an entertainment industry increasingly dominated by video, YouTube Music offers the combination of intelligent algorithms and playlists found on other streaming services with music video visuals that the brand was already so well-known for. Available in 100 countries, and having taken over from Google Play as Google's primary music streaming brand in 2020, is YouTube Music on track to take the top spot in years to come?

3 in 10 people listened via YouTube Music in the past month

In the last month, which of these services have you used to listen to/download music, radio or audiobook content?



Top 5 platforms for:



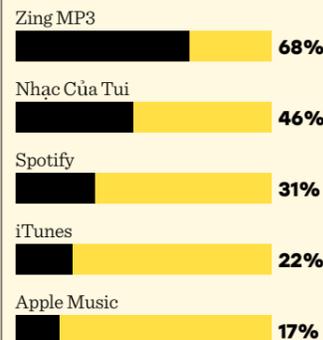
VIETNAM & LOCAL STREAMING

Unlike most other countries, in Vietnam, local streaming services have gained enormous traction, leaving the usual global market leaders such as Spotify, iTunes and Apple Music trailing behind.

Vietnamese platforms, Zing MP3 and Nhạc Của Tui are the top 2 most used platforms in the country with 68% and 46% of listenership respectively. Zing MP3 is one piece of a large internet and media puzzle operated by VNG. Described as Vietnam's "first unicorn company" (meaning a startup worth over 1 billion dollars), the tech giant also develops video games, TV streaming services like Zing TV, messaging apps like Zalo and online payment services like Zing Pay. Zing MP3 started in 2007 with a similar set-up to MySpace, where users could embed songs into blogposts or send music to friends. Nhạc Của Tui started in the same year with a song-sharing model, and both sites have continued to be popular in Vietnam ever since. The success of these local services seems grounded in the fact that they keep up to date trends and support video as well as audio content whilst championing Vietnamese music.



Streaming services used in the last month in Vietnam



SPOTLIGHT:

Soundcloud and Mahraganat



In Egypt, the most listened to service by some way is SoundCloud. 52% of the population listens to music on this service, bucking the global trend which sees the platform generally rank no higher than 4th or 5th place, if at all.

The popularity of the service in Egypt is also evident in how most of the songs in the "World Music" charts on SoundCloud feature Egyptian artists. One genre that has a special connection to the platform is Mahraganat.

Mahraganat – meaning a big messy festival – is Egyptian street music that fuses EDM with Shaabi, a twentieth-century working-class folk music style played at weddings in Egypt. It draws influences from Hip-hop, Reggaeton and Grime, and breaks away from traditional Egyptian culture.

The use of street slang by Mahraganat artists has caused controversy. In March this year, two singers from the genre Hama Beeka and Omar Kamal were fined for "violating family values" by singing and dancing with a belly dancer in a music video that came out in 2020. Mahraganat artists also have been banned from the country's union of musicians, and the genre being prohibited from broadcast radio for its obscene lyrics.

This is where SoundCloud comes in. Instead of gaining popularity through radio plays, Mahraganat spread online via SoundCloud, and music videos posted on YouTube, transforming from an underground subculture into a mainstream phenomenon.

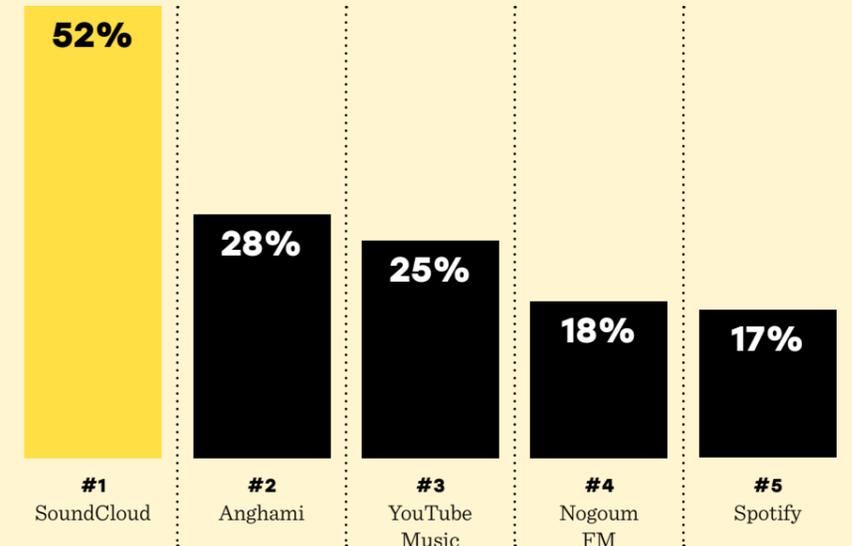
In April 2022, a song from the genre, El Melouk by The Kings, was featured in an episode of *Moon*.



STATS AND THAT

Egypt's streaming landscape.

Streaming services used in the last month in Egypt



21.5 million people in Egypt used Soundcloud last month

Singers Hama Beeka and Omar Kamal fined

20,000

Egyptian Pounds by an Egyptian court for violating family values through their dancing and singing.



MAFIA BY MOHAMED RAMADAN

73 million plays on Soundcloud

1.75 million likes on Soundcloud

Knight, a Disney + miniseries from the Marvel Cinematic Universe. What's more mainstream than Disney and superheroes?

“” Mahraganat draws influences from Hip-hop, Reggaeton and Grime, and breaks away from traditional Egyptian culture.



THE PODCAST BOOM

The podcast (a portmanteau of 'iPod' and 'broadcast') has evolved a lot since its humble origins. 1 in 4 people across 40 countries listen to podcasts every week.

The COVID-19 pandemic was a catalyst for the boom in both the consumption and creation of podcasts. When denied our usual social interactions, listening to others telling stories or just chatting provided many of us with a reassuring sense of connection. Since the beginning of 2020, the average daily time spent listening to podcasts increased from 38 minutes to 45 minutes in 2021, and to 51 minutes in 2022. Podcasts are also inexpensive to make. Interviews can be carried out online and episodes can be uploaded from any location. This made them the perfect medium for amateurs and celebrities alike who were stuck inside during lockdowns around the world. Prevented from their usual gigs, speeches, and TV events, 2020 saw many big names

1hr 5 mins is the *average time* 25-34-year-olds spend *listening to podcasts in a week.*

create their own shows, ranging from comedians such as Brits *Tom Davis* and *Romesh Ranganathan* to former First Lady *Michelle Obama*, or the unlikely pairing of billionaire *Bill Gates* and actor *Rashida Jones*. The popularity of "pods" is yet to fade and there are now over 2.5 million podcasts available on *Apple Podcasts* in 2022.

"SOCIALS. RADIO. PODCASTS."

Even pre-pandemic, podcasting was on the rise. Over the past five years, it has transformed from a type of

media on the outskirts, to one that is intertwined with traditional and digital media. In 2019, the BBC decommissioned its iPlayer Radio app and officially replaced it with BBC Sounds – a platform with the tagline "Music. Radio. Podcasts."

The inclusion of podcasts on the audio-streaming app for one of the oldest and most well-known radio networks demonstrates their prominence in the media landscape. At the less traditional end of the media spectrum, social media stars have also turned to podcasting. For example, *Charli D'Amelio* – the first person to earn 100 million followers on TikTok – created *Charli and Dixie: 2 CHIX* with her sister in 2020. More recently, British TikTok star *Grace Keeling* (@gkbarry) launched *Saving Grace* featuring interviews with fellow influencers and pop culture icons. Each episode is filmed, and teaser clips are posted on TikTok and Instagram, further highlighting the interconnected nature of podcasts and social media.



STATS AND THAT

The majority of podcast listeners find it easy to find ones they like. And many use ads in episodes to discover new brands.



51% of weekly podcast listeners find it easy to discover podcasts they enjoy

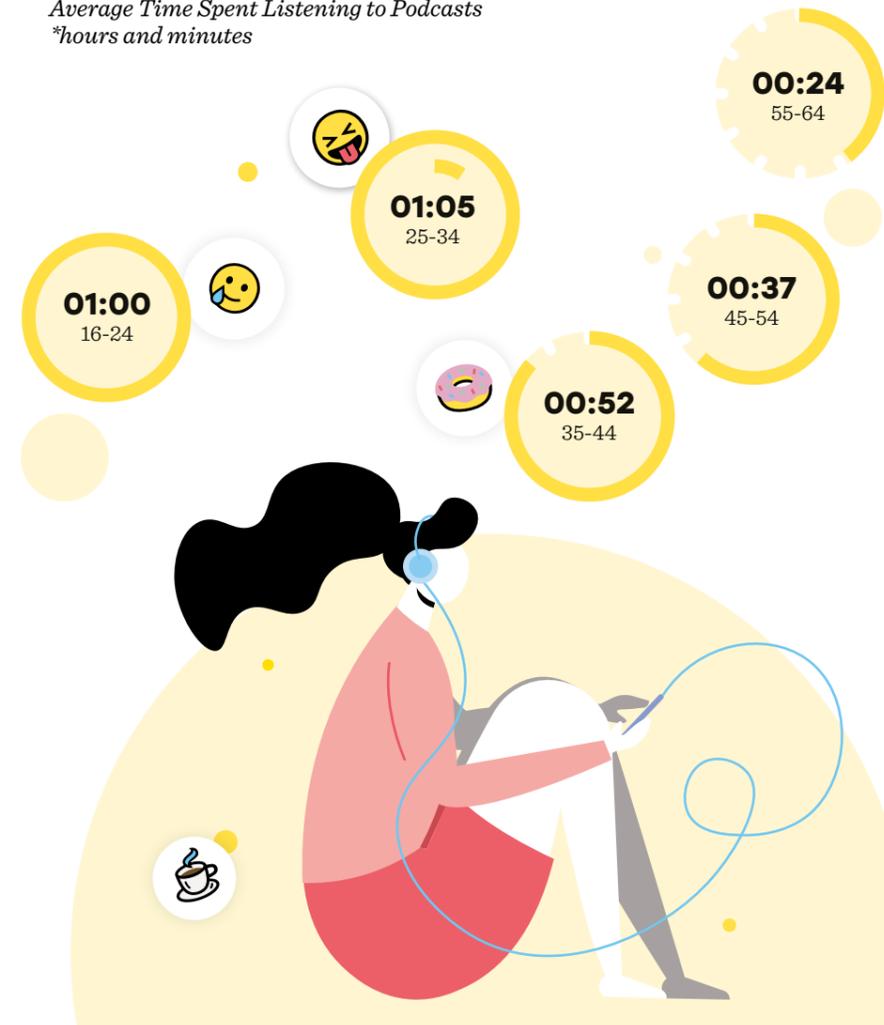


24% of respondents listened to a podcast in the previous week



22% of weekly podcast listeners typically discover brands through ads/ sponsored content on podcasts

Average Time Spent Listening to Podcasts *hours and minutes



I LISTENED TO A PODCAST IN THE LAST WEEK.



TOP 40

1		Brazil	39%
2		Indonesia	38%
3		Mexico	37%
4		South Africa	30%
5		Ireland	29%
6		Sweden	28%
7		Romania	27%
8		USA	25%
9		Spain	24%
10		Denmark	24%
11		Portugal	23%
12		Australia	23%
13		Israel	22%
14		Poland	22%
15		Canada	21%
16		Saudi Arabia	21%
17		Germany	21%
18		UK	21%
19		New Zealand	20%
20		Thailand	20%
21		Philippines	20%
22		UAE	20%
23		Argentina	19%
24		Czech Republic	19%
25		Austria	18%
26		Vietnam	17%
27		Netherlands	17%
28		Switzerland	17%
29		Singapore	17%
30		Turkey	17%
31		Greece	16%
32		Hong Kong	16%
33		Taiwan	16%
34		Malaysia	16%
35		Italy	15%
36		France	14%
37		Belgium	14%
38		Egypt	13%
39		South Korea	12%
40		Japan	4%

ALL-AMERICAN AUDIO

51 million people in the US listen to podcasts every week. That's more than the entire population of Spain. But where do they listen? And what are they listening to? Despite being video based, the top platform for podcast consumption in America is YouTube. Increasingly, there is a crossover between podcasting and video content. At the forefront of this merge was *The Joe Rogan Experience*. America's most popular podcast show in 2022 has been uploading episode recordings on the platform since 2013, including Rogan's infamous interview with *Elon Musk* which received 65 million views. Two years ago, YouTube's competitor, Spotify, joined the efforts to bridge video and audio by launching video podcasts on the streaming platform. This shift begs the question: what makes a podcast a podcast? Does this format not transform audio content into vlogs? Video podcasts have their own specific style. Viewers are invited to have a fly-on-the-wall experience as if watching natural, unscripted behind-the-scenes material. Hosts and guests never talk directly to camera, and all the audio equipment including microphones are on display. This transition is not podcasts being replaced by long-form videos, rather the creation of a new category of podcast altogether.

65m views

The Joe Rogan Experience podcast episode with *Elon Musk*.

In terms of genres, the top choice is Comedy, with 3 in 10 podcast consumers choosing the genre, followed by News & Politics, True Crime, Music and History. Podcasts that consistently top the Spotify charts in the US somewhat reflect these preferences, such as *The Joe Rogan Experience*, *Crime Junkie*, *Morbid* and *The Daily*, which cover Comedy, True Crime, and News & Politics. However Music podcasts rarely make the Top 10 which may indicate that fanbases for the genre are more nuanced and less concentrated around a specific series.

*regular = at least once a week

Top genres for regular podcast listeners in the US*

Comedy	30%
News & Politics	28%
True Crime	25%
Music	19%
History	18%
Sports	18%
Talk show	17%
Health & Living	16%
TV & Movies	16%
Technology	15%
Religion & Spirituality	14%
Society, Arts & Culture	14%
Science	13%
Advice & Self-Help	12%
Business	12%
Games & Hobbies	11%
Travel	11%
Supernatural	9%
Entrepreneurship	7%
Kids & Family	6%

Platforms used by regular podcast users

YouTube **47%**

Spotify **41%**

Apple Podcasts **30%**

Pandora **14%**

Other **12%**

Audible **9%**

Google Podcasts **8%**

NPROne **6%**

Stitcher **4%**

TuneIn **4%**

Deezer **3%**

& STATS AND THAT

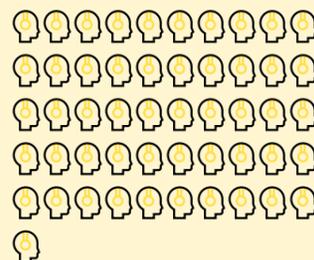
In the US, the number of people listening to podcasts on a weekly basis is equivalent to the entire population of South Korea. And a fifth of them discover brands through ads they hear. This is a big opportunity for advertisers.



1 in 4 Americans listen to podcasts weekly



22% of weekly podcast listeners typically discover brands through ads/ sponsored content on podcasts



51 million people listen to podcasts weekly

SPOTLIGHT:

Women in the US ❤️ True Crime



In the United States, those who identify as women are big fans of True Crime. It's the top genre amongst regular podcast listeners who are women, with a third (34%) listening to True Crime compared to only 16% of men.

There are even accounts on social media like @truecrime.memes with stereotypically feminine – pink and floral – branding which post memes and recommend podcasts. As well as listeners, those behind the microphones of popular crime podcasts are predominantly women. 3 of the top 10 shows in the US fall under True Crime: *Crime Junkie*, *My Favourite Murder* and *Morbid*, and each of these podcasts are hosted by a female duo.

So why do women love listening to True Crime? Some academics believe it is the problem-solving element of the genre, or a desire to understand possible threats in order to avoid them. Others think women enjoy the cathartic nature of True Crime podcasts. Listeners can engage with gruesome and frightening dangers in society where women are often the victims but do so from the safety and comfort of their own home.

& STATS AND THAT

One in three women in America are listening to True Crime podcasts, and the other two are probably presenting one! Jokes aside, women are very involved in the genre on both sides of the microphone...



34% of women listen to True Crime podcasts (of those who listen to podcasts weekly)



3/10 most popular podcast shows in the US fall into the True Crime genre

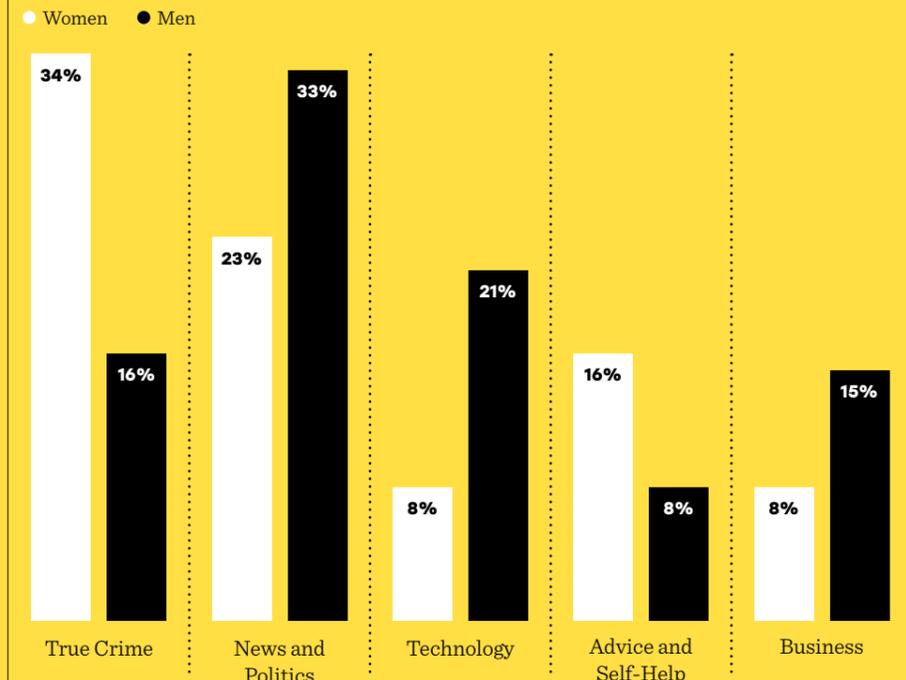
Top 5 podcast genres for regular male listeners in the US

1. NEWS & POLITICS	33%
2. COMEDY	31%
3. SPORTS	28%
4. TECHNOLOGY	21%
5. MUSIC	21%

Top 5 podcast genres for regular female listeners in the US

1. TRUE CRIME	34%
2. COMEDY	29%
3. NEWS & POLITICS	23%
4. HEALTH & LIVING	21%
5. TALK SHOW	17%

Big differences by gender:





Ask the expert



From broadcasting to narrowcasting

BEN JONES

answers our questions...

Ben Jones is the founder and executive producer of Gimme Sugar Productions, the business produces successful music formats, marketing campaigns, feature-length formats and podcasts such as *'Rockonteurs'*, *'I Never Thought It Would Happen'* and *'The John Hughes'* podcast for a variety of clients such as Warner Music Group, BBC, Help Musicians.

He is a national broadcaster of 25+ years on Virgin Radio UK and consults for Sony Home Entertainment.

ANDD: What was the world of British radio like when you first started your career and how has it changed?

Ben: It's gotten bigger and smaller if that makes sense. There is more choice because digital has allowed a degree of narrowcasting. Rather than broadcasting to many, radio stations are broadcasting to a diehard smaller audience. This allows the radio groups to expand their reach and grow their audiences because they have added a new radio station which might bring in 200k listeners and they bolt that to the group. There's more choice, which I think is great. What has changed is that the number of radio players in the business has gotten a lot smaller. Excluding the BBC, you've got Bauer, Global, News and that's about it. And then there's a few minnows kicking around. From a presenter's point of view, there's fewer opportunities because there's a lot of networking. Heart for example used to be built up of lots of radio stations across the country doing 24 hours of local programming. What's changed is that they now probably just have a local afternoon show because everything else is networked out of Leicester Square. Technology allows radio stations to localise specific content so rather than have a whole local radio show, parts of the show will be "local" and the rest comes from London. There are more opportunities to listen for the consumer but less for presenters because the competition has got smaller.

ANDD: I know you used to present on Absolute 80s. We found that when looking at the top genres, 80s and 90s music was popular even amongst younger age groups. Why do you think that is?

Ben: Well Virgin has just launched an 80s radio station and it has flown out the door. It's called Virgin Radio 80s + because it includes late 70s and early 90s thrown in. Why do I think those stations are popular? Because we are living through tough times. I think people want to feel good. They want to turn on the radio and be entertained. The radio is still entertainment. A podcast is still entertainment. I think whatever gets us through the day right now frankly. And the irony being that the 80s was fairly tough, but we probably remember it through rose-tinted glasses. Whether you're listening to The Power of Love by Huey Lewis, or New Order, or a track from the Top Gun soundtrack, it just makes you feel good because they're good songs. And now because of connected devices it's far easier to find these stations. "Play me X", or "Play me Y", and the smart speaker will do the rest.

ANDD: I was going to say, we found the UK loves smart speakers - do you think that's made a difference to radio and podcasting?

Ben: I think it's all about ease of accessibility. I remember when Virgin Radio first came back in 2016 and it was only available

“”
80s music is popular because we're living through tough times and the songs make you feel good.

on a digital radio. So - because I'm old - I was like 'Oh no one's gonna find this'. I had a Mercedes at the time that didn't have DAB in the car. Very very quickly thereafter, I go down and see my mum and she's listening on a smart speaker and she's listening to the radio. I don't think we even have a radio in this house, what we have is a load of smart speakers.

ANDD: Yes, such a rapid change! I remember when BBC Radio changed its tagline to "On BBC Sounds, on your smart speaker and on FM".

Ben: I use my mother as a litmus test of when things have reached mainstream. When my mum is listening to Virgin Radio at home on her smart speaker I go, oh okay it's not just a London bubble. And I think that's a great thing. They're easy to set up. They're cheap and accessible. They're what radios were when they first came out.

ANDD: I want to talk about podcasting. What do you think makes a good podcast?

Ben: Wow okay. I go back to what I said earlier on. It's entertainment. It depends how you're feeling. Podcasts offer variety in the same way TV and magazines offer variety. You may be into True Crime or politics. Or you may be into music and conversations and history. I always remember leaning into podcasts when I saw a cycling podcast. I'm not even a cyclist, but I remember thinking that a cycling radio show is highly unlikely. Not even BBC Five Live would do that unless it was the Tour de France. However, this podcast was getting a hundred of thousands of listeners, and it made me realise this isn't about broadcasting any more, it's about narrowcasting. Finding niche genres that might not necessarily at the time reach mass audiences via traditional media. But they reach focused, passionate lean-in audiences via targeted dedicated channels or shows. Podcasts can target that consumer base directly and that's why they've done so well. And of course, we now all carry the device to listen all the time. If you download it, whether you're underground or overground, you can listen and very quickly it becomes a habit. Whether you're into The Rest is Politics or Rockonteurs or something about model aeroplanes, there's a podcast for you. What I find interesting about podcasts is they are like an iceberg. There's about 5% above the waterline that are making money and are well-produced and the other 95% are not making anything and are reaching a small audience but that's fine.

ANDD: What would you recommend for making a podcast that is out of the 95% and in the 5%?

Ben: One of the big things is production. That's something I've learned over 25 years. You've gotta make it easy for people to listen. Are the mic levels right? Does it sound okay? Does it ease you in from the start? I use this roundabout method. When I'm approaching a roundabout, I know where I'm coming from, where I'm going and how I'm exiting.

It's the same mentality when creating a podcast - how are we approaching it? How are we getting it out? And how are people going to find it? Discoverability is the biggest issue with podcasts because it's a bit like a needle in a haystack. When we are approached to make a podcast my first question is: why would anyone care? There needs to be a good reason, good stories. Don't just assume you can open the microphone as it were and find an audience. You have to build that and that's where talent comes in. That's why you see that the biggest podcasts have the biggest names or are from the big broadcasting companies. Global make a lot of podcasts, Bauer, BBC Sounds. And you see some of the BBC's biggest talent leaving the institution to go and make podcasts. What does that tell you? That Global are willing to pay to buy this talent because they believe this is going to be as big.

“”
Smart speakers are what radios were when they first came out.

ANDD: Your production company, GimmeSugar covers audio socials and video. How do you think video platforms like TikTok and YouTube have affected audio and podcasting?

Ben: TikTok terrifies me because I don't understand it. We use those platforms to find an audience, and then to point them in the direction of our podcasts. We use it as a shop window. I think if you are ignoring TikTok, you are in trouble. Rockonteurs for example has a predominantly male, 45+ audience. There's an argument to say, well they are not on TikTok. But if we want to grow our audiences, a lot of our guests are just as interesting to young audiences as older audiences. That's where I see the benefit of these video platforms.

ANDD: I see you produce a podcast for the charity Help Musicians - how do you think the music and audio industry has changed due to COVID?

Ben: I think that the podcast we do for Help Musicians is a total thrill. It feels really good to be able to give something back and to work with that charity and a wonderful ambassador like Chris Difford (from Squeeze) who really does roll his sleeves up and get involved with that charity. For us as an outsider looking in on the work the charity does, is incredibly beneficial. I think COVID was the second part of what was a devastating impact on the unsigned music community. Help Musicians does not exist to look after Taylor Swift and Harry Styles, it exists to look after session musicians who might be touring with those artists, or unsigned musicians who make a living performing in pubs, clubs, entertainment industry gigs. And it's been brutal. The first part of that was Brexit. It's now much harder for artists to tour or make money from touring. In some instances it's impossible to tour long term because they have to keep coming back to make sure they don't get into trouble with visa complications. Then they had two years of not being able to earn money. Devastating. Now we have a cost-of-living crisis which frankly is a luxury. Hiring a band or going to a gig is a luxury and venues have to charge more to hire, meaning that the artist is earning even less than they were before. So a charity like Help Musicians is absolutely essential, and the work they do is pioneering. Everyone assumes if you work in music or entertainment then you are down the Groucho club every night quaffing champagne, and it's not true. Our job is to raise the profile of this charity who need a little bit more attention.

ANDD: What do you think is the biggest challenge and opportunity for the audio industry?

Ben: I think the biggest challenge for podcasting is saturation. Does the world

need another celebrity telling us about their life? Why do we make this and who's gonna listen? And the second challenge is making any money. To really make any money you need around 50,000 listeners per episode and that's not easy... God bless platforms like Audioboom and Acast who really help creators monetise their content. Rockonteurs luckily is funded by a record label. These

“”
Discovering podcasts is like finding a needle in a haystack.

record labels now want to be entertainment businesses not just record labels so I'm incredibly grateful to a record label like Warner for being able to fund Rockonteurs. We wouldn't be able to fund it otherwise. It kind of supports them with their artists. Gary Kemp [one of the hosts] is in Spandau Ballet - one of their artists. But it also allows them to move into the programming and entertainment space. Which all of the record labels are doing. Sony acquired the production company Something Else, and Warner took over what was The Firepit and turned it into Warner Music Entertainment, an incredibly successful production company making films about Liam Gallagher or branded content or podcasts. And the same with Universal with Mercury Studios. They are all now content creators. They are all now production companies. The biggest opportunity is the ease of access. You and I could make a podcast today and get it up and out. Not a problem. That's the biggest opportunity. The challenge is then finding an audience for it.



I PLAYED A VIDEO GAME IN THE LAST MONTH.

TOP 40

1	Taiwan	57%
2	Indonesia	53%
3	Vietnam	53%
4	Philippines	52%
5	Mexico	48%
6	Thailand	48%
7	Argentina	48%
8	Brazil	47%
9	Turkey	47%
10	Hong Kong	43%
11	Saudi Arabia	41%
12	Spain	40%
13	South Africa	40%
14	Malaysia	40%
15	Romania	36%
16	Poland	36%
17	USA	35%
18	France	35%
19	Portugal	34%
20	UAE	33%
21	Denmark	32%
22	Egypt	30%
23	Czech Republic	29%
24	Canada	28%
25	New Zealand	28%
26	Belgium	28%
27	Singapore	27%
28	Greece	27%
29	Netherlands	26%
30	UK	26%
31	Australia	25%
32	Italy	24%
33	Ireland	24%
34	Sweden	22%
35	Switzerland	21%
36	Germany	20%
37	Austria	19%
38	Israel	19%
39	Japan	9%
40	South Korea	9%



GLOBAL GAMING COMMUNITIES

Gaming is no longer a niche activity. It is the basis of a globally distributed community that spans all continents and various sub-cultures. Different franchises provide access to digital experiences beyond the ordinary, functioning as spaces to socialise, to switch off, to explore new worlds, and to engage with friends.

The top 8 countries for those who have played a video game in the past month are all located in either Southeast Asia or Latin America, with Taiwan topping the charts. Still, nearly 4 in 10 (39%) of the global sample regard gaming as a personal interest, reflecting the international nature of the gaming community. More to the point, in 33 of the 40 music nations at least 10% of the population had played a game using a cloud-based gaming platform/ streaming service or a physical game in the last month.

For some, gaming isn't simply an occasional activity. We have identified within the data, gaming

fanatics, a sub-section of the uber-engaged. They are defined as those that have purchased an in-game add-on / downloadable content or an in-game item/feature and watched a gaming livestream or e-sports tournament in the past month.

Reflecting patterns around interest levels, gaming fanatics are concentrated in southeast Asia and Latin America. Men dominate, making up 69% of the segment, but the female presence is strong in Vietnam (41%), Thailand (41%) and Saudi Arabia (39%), challenging residing stereotypes about the gendered nature of gaming communities.

In terms of franchises, the top choice is FIFA. First launched in 1993 on the Sega Megadrive, the football-video game is soon to be discontinued due to a split between EA and FIFA. Both will bring out their own versions next year with competing promises of authenticity, but the question is, will either reach the lofty heights of FIFA? And how will the playlists shape up? With FIFA Sounds a verified artist on

Top 10 countries by proportion of gaming fanatics

1.	PHILIPPINES	10%
2.	INDONESIA	9%
3.	THAILAND	9%
4.	VIETNAM	8%
5.	BRAZIL	8%
6.	SAUDI ARABIA	8%
7.	MEXICO	7%
8.	TURKEY	7%
9.	MALAYSIA	7%
10.	USA	7%

6% of the total sample are defined as gaming fanatics. This is equivalent to 78.2m people across all 40 nations.



RAP/HIP-HOP - A GAMERS PARADISE.

"SUPER NINTENDO, SEGA GENESIS / WHEN I WAS DEAD BROKE, MAN, I COULDN'T PICTURE THIS."

When *Biggie Smalls* uttered the now famous bar, one could have been forgiven for underestimating the extent of the relationship between rap/hip-hop and gaming. Now, not so much.

With *Lil Nas X* releasing *Star Walkin'* in collaboration with online game *League of Legends*, *Travis Scott* performing in *Fortnite*, and *T-Pain* emerging as a major presence on *Twitch*, the interrelations between the genre they represent and gaming are plainly apparent. This figures in our data, with over half (51%) of all gaming fanatics claiming to like listening to this genre, compared to 28% of the total sample.

Top 5 gaming franchises

1.	FIFA	21%
2.	CALL OF DUTY	19%
3.	MINECRAFT	17%
4.	MARIO	17%
5.	GRAND THEFT AUTO	14%

Spotify, and "FIFA Songs" a well-established phenomenon that has seen the likes of *Fools Gold* and *Heatwave* finding new audiences through their inclusion in the soundtrack to the beautiful game, we can be sure that music will remain an important element.

MUSIC AND GAMING: A MATCH MADE IN DIGITAL REALITY

The experience that games offer is nothing without the music. Setting the tone and enhancing the narrative, it is fundamental to player engagement, and the symbiotic relationship between the industries is well established.

In recent years, however, the relationship between the two forms of entertainment has reached new heights. Music is not only in the background but is increasingly taking centre stage as a key reason for the appeal of certain games. The soundtrack *Deathloop* is a prime example. Blending rock, 60's music and Swedish Jazz to create a unique and electric sound,

16% purchased a video game in the last month.

this has been celebrated in and of itself. Furthermore, not only are gamers listening to scores within the gaming experience, but they have also taken these to streaming services, with major players such as Spotify creating specialised playlists to cater to this growing category of music engagement.

What music offers gaming; gaming also offers music. Video games are essential avenues for musical promotion and fan engagement. And our data shows that gaming fanatics (79%) are more likely to consider music a personal interest than the total sample (63%).

SPOTLIGHT:

Live streaming and e-sports



The opportunities that gaming can offer the music industry has increased with the evolution and popularisation of live streaming.

With the pandemic and the subsequent reduction of live music events, platforms such as Twitch have provided musicians with new means through which to engage fans morning, noon, and night. The success of in-game-concerts provided by the likes of *Travis Scott* and *Ariana Grande* are proof of concept and given that 17% of our sample watched a live gaming stream or esports tournament last month, it is fair to say live-streaming is no niche, but rather an increasingly popular activity with significant relevance for established and smaller artists alike. The same can be said for e-sports, which is only slightly less popular than live streaming with nearly one in ten (9%) claiming to have watched a tournament in the past month.



DID YOU KNOW ?



17% had watched either a live gaming stream or an esports tournament in the previous month



4% had broadcasted a live stream of their game play in the previous month

I WATCHED A LIVE GAMING STREAM OR ESPORTS TOURNAMENT IN THE LAST MONTH.

TOP 40

1		Philippines	31%
2		Indonesia	25%
3		Brazil	25%
4		Vietnam	25%
5		Thailand	23%
6		Mexico	22%
7		Saudi Arabia	21%
8		Turkey	21%
9		UAE	19%
10		Taiwan	18%
11		Malaysia	18%
12		Argentina	17%
13		USA	16%
14		South Korea	16%
15		South Africa	16%
16		Spain	14%
17		Hong Kong	13%
18		Germany	12%
19		Singapore	11%
20		Canada	11%
21		Poland	11%
22		France	11%
23		UK	11%
24		Egypt	11%
25		Greece	11%
26		Sweden	11%
27		Italy	10%
28		Portugal	10%
29		Australia	10%
30		Denmark	10%
31		New Zealand	10%
32		Romania	10%
33		Ireland	9%
34		Austria	8%
35		Belgium	8%
36		Netherlands	8%
37		Czech Republic	7%
38		Japan	7%
39		Switzerland	6%
40		Israel	6%

Young populations dominate audio creation

► Creation –the act of producing or causing to exist– is fundamental to the human experience. And where music is concerned, it’s a popular site of identification.

ANDD discusses the impact of *TikTok* and audio creation...

With generally younger populations than their counter-parts in the Global North, countries in the Global South, such as Thailand, Indonesia and Vietnam emerge as hotspots for creation, with above average proportions of audio creators and musicians.

As ever, technological change is a critical element of the story. TikTok has emerged as a space for creation as much as consumption with varying degrees of overlap between those who create music and audio and those who upload videos to the social media platform.

FROM THE FOR YOU PAGE TO THE WORLD

With over 1 billion users around the globe, TikTok has upended traditional methods of musical creation. Its highly personalised algorithm and the platform’s meme-ification of “sounds” enables audio content to spread far beyond someone’s follower count.

TikTok has democratised access to the ears of millions of people and ordinary people with neither means nor record deal have risen to rapid fame. *Sam Ryder* is a prime example. The British singer-song writer went from posting



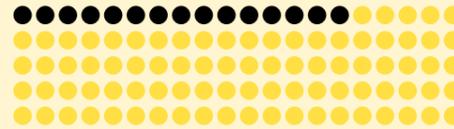
covers of his favourite tracks in March 2020 to representing the UK at Eurovision in the space of two years. TikTok is the cornerstone of Gen Z music creation. The need for catchy soundbites to engage users has pushed artists with energetic beats

and memorable lyrics to popularity, such as 20-year-old Pinkpantheress who went viral with her track, *Pain*.

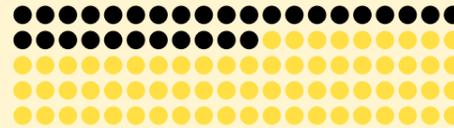


STATS AND THAT

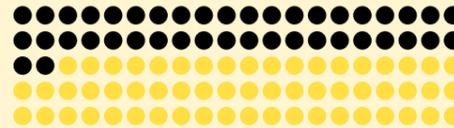
Music and creativity are a perfect match and young people are leading the way in putting them together.



15% of respondents considered themselves, globally, musicians or audio-creators.



31% of 25-34 year-olds listen to music to inspire their own.



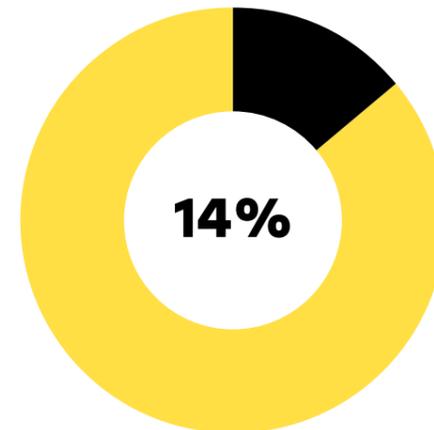
42% of respondents listen to music to feel creative, globally.



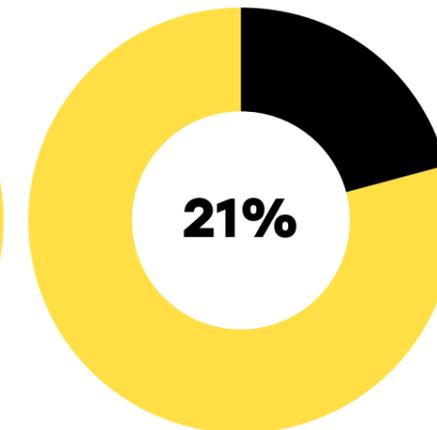
60% of people in Thailand listen to music to feel creative.



80% of the countries with the youngest populations also feature within top 10 for proportion of musicians/audio creators.



of all respondents posted a video on TikTok last month



of audio content creators/ musicians posted a TikTok video last month



I CONSIDER MYSELF A MUSICIAN OR AUDIO CREATOR.



TOP 40

1	Thailand	23%
2	Saudi Arabia	22%
3	Turkey	20%
4	Philippines	19%
5	UAE	17%
6	South Africa	17%
7	Indonesia	17%
8	USA	17%
9	Vietnam	16%
10	Egypt	16%
11	Australia	15%
12	Mexico	14%
13	Brazil	14%
14	Poland	14%
15	Israel	14%
16	Singapore	13%
17	Canada	13%
18	Switzerland	13%
19	Malaysia	13%
20	Austria	13%
21	Germany	13%
22	Sweden	12%
23	UK	12%
24	France	12%
25	Italy	12%
26	Spain	12%
27	Netherlands	12%
28	Greece	12%
29	Ireland	11%
30	Belgium	11%
31	Portugal	11%
32	Hong Kong	11%
33	Denmark	11%
34	New Zealand	10%
35	Romania	10%
36	Argentina	9%
37	Taiwan	9%
38	South Korea	8%
39	Japan	7%
40	Czech Republic	7%

Young Millennials are making the most music and audio content. Audio creators by age:



16-24
27%



25-34
31%



35-44
23%



45-54
13%

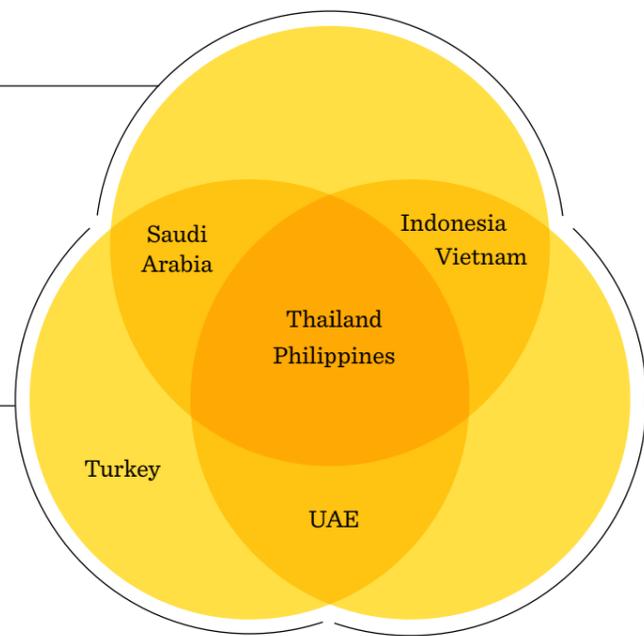


55-64
7%

“ ”

I LISTEN TO MUSIC TO INSPIRE MY OWN

AUDIO CREATOR/MUSICIAN



POSTED ON TIK TOK IN THE PAST MONTH

“ ”

I consider myself a musician/audio creator

1. THAILAND	23%
2. SAUDIA ARABIA	22%
3. TURKEY	20%
4. PHILIPPINES	19%
5. UAE	17%

“ ”

I listen to music to inspire my own:

1. THAILAND	52%
2. VIETNAM	42%
3. PHILIPPINES	39%
4. SAUDIA ARABIA	37%
5. INDONESIA	36%

“ ”

I posted a TikTok video in the past month:

1. VIETNAM	29%
2. THAILAND	27%
3. PHILIPPINES	24%
4. INDONESIA	23%
5. UAE	22%

REGIONAL TRENDS

The top countries for multiple factors attached to creation are all located in the Middle East or Southeast Asia:

- Thailand
- Philippines
- Vietnam
- Indonesia
- Saudi Arabia
- Turkey
- UAE

They all appear in one or more Top 5 for: TikTok Creators; Musicians/Audio Content Creators; and those who listen to music to inspire their own music.

The prevalence of these two regions could be linked to their youthful populations. Half of the top ten youngest countries are located in Southeast Asia, with two located in the Middle East.

Thailand and Philippines are amongst the top 5 for all three categories, highlighting a particular passion for music and audio creation online in both nations. Musicians and audio creators are more likely to post videos on TikTok than the general population. But this varies significantly by country. Take Thailand and the UK.



“ ”

I HAVE UPLOADED A VIDEO TO TIKTOK IN THE LAST MONTH.



TOP 40

1	Vietnam	29%
2	Thailand	27%
3	Philippines	24%
4	Indonesia	23%
5	UAE	22%
6	Saudi Arabia	19%
7	Mexico	18%
8	South Africa	18%
9	Brazil	18%
10	Egypt	15%
11	Malaysia	15%
12	Turkey	12%
13	USA	12%
14	Argentina	11%
15	Romania	11%
16	Spain	10%
17	Poland	10%
18	Portugal	9%
19	Singapore	9%
20	Australia	8%
21	UK	8%
22	Canada	7%
23	Greece	7%
24	Sweden	7%
25	Ireland	7%
26	Italy	7%
27	Netherlands	7%
28	New Zealand	7%
29	France	6%
30	Germany	6%
31	Israel	6%
32	Switzerland	5%
33	Denmark	5%
34	Hong Kong	5%
35	Taiwan	5%
36	Belgium	5%
37	Austria	4%
38	Czech Republic	3%
39	South Korea	3%
40	Japan	2%

In Thailand, nearly one third (32%) of TikTok Creators consider themselves musicians or audio creators. This is at a similar level for TikTokers in the UK where 30% think of themselves as the same.

However, UK musicians and audio creators are utilising the audio-focused form of social media to a much lesser degree. 36% of musicians and audio creators in Thailand are posting videos on TikTok compared to only 17% of musicians and audio creators in the UK.

23% of people in Thailand consider themselves *musicians* or *audio creators*.

Of those who "consider myself a musician/audio creator."

Uploaded videos to TikTok in the last month

TOTALS	21%
THAILAND	36%
UK	17%

Of those who uploaded a video on TikTok in the last month

"I consider myself a musician/audio creator."

TOTALS	24%
THAILAND	32%
UK	30%

SPOTLIGHT:

Milli, music and mango sticky rice



Danupha "Milli" Khanatheerakul is a 19-year-old rapper from Thailand. She started her musical career as a 16-year-old contestant on the Thai TV show *The Rapper 2* where her multilingual bars wowed the judges.

Her debut single *Phak Khon* was released in February 2020 and currently has over 92 million views on YouTube. Milli's viral fame didn't stop there. With her typically Gen Z 2000s' fashion style and playful sense of humour, her TikTok videos regularly receive millions of views. She was the first Thai solo artist to perform at Coachella in April 2022 and ate mango and sticky rice on stage whilst performing a new song named after her favourite snack. This trended on TikTok and Twitter and led to the Thai government pushing for the dish to receive a UNESCO listing, with sales of the dessert tripling in the 24 hours after her performance.



@milliyormlenlaew

5.6m followers

69.8m likes

92m views on YouTube



DID YOU KNOW ?



200+ varieties of mango grown in Thailand



750,000 people attended Coachella 2022



Sales of the dessert tripled in the 24 hours after her performance

Music has always been more than just entertainment

▶ Music means many things to many people. It is an expression how we feel (both as listeners and as artists). It can be a declaration of love, it can be a platform for our values, and it can be used as a catalyst for change...

ANDD discusses *the social impact of music*.

Every generation believes in music's power in society



That is how respondents felt, globally, with nearly half (47%) taking the position that music can be a powerful agent for change in society.

In recent years, the power of music as a catalyst for action has come to the fore. In tandem with the Black Lives Matter movement, both artists and industry leaders have highlighted the systemic problem of racial inequality in society. British rapper *Dave* released *Black* in 2019 which discussed the legacies of colonialism and the experiences of the African diaspora. In the summer of 2020, American R&B singer *H.E.R.* released *I Can't Breathe* in response to the killing of George Floyd by a police officer in Minneapolis, and Atlantic Records instigated a social media blackout using the hashtag #TheShowMustBePaused to protest police violence and hold the music industry – which benefits so much from Black artistry – accountable.

Music both reflects and informs what audiences think is important. It is a vital tool in social movements and can be used to gauge what we, as listeners, value most.



APARTHEID & MUSIC FOR EQUALITY

South Africa has a long history of using music to champion equal rights. The *toyi-toyi* is a dance that originated in Zimbabwe and is used in South Africa during protests.

It was famously used in marches during the anti-apartheid movement. Many South African musicians played pivotal roles in spreading anti-apartheid messages. Singer *Miriam Makeba* released *Beware Verwoerd* in 1965, calling out Prime Minister Verwoerd who was instrumental in establishing the Apartheid regime. She collaborated with trumpeter *Hugh Masekela* in 1977 to create *Soweto Blues* in commemoration of the Soweto Uprising by black school students. Even as tides were changing, South African musicians sang of equality. *Brenda Fassie* wrote *Black President* in 1990 in praise of Nelson Mandela's release from

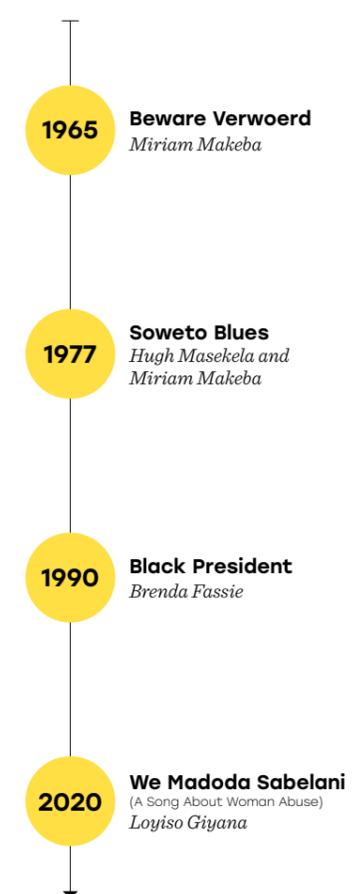
prison, and the end of Apartheid. Musicians in the country continue to use music to spread important messages. *Loyiso Gijana* is an R&B singer and the first South African signed to Republic Records. In 2020, he released *We Madoda Sabelani (A Song About Woman Abuse)* speaking out against the crisis of gender-based violence in South Africa. The music video, which features photos of recent victims of femicide, has 2.6 million views on YouTube and has been widely praised by the South African press.



2 out of 3

people in South Africa believe music can drive social change

South African singers standing up throughout history



“ I THINK MUSIC CAN BE A POWERFUL AGENT FOR SOCIETAL CHANGE.”



TOP 40

1	South Africa	66%
2	Brazil	61%
3	Portugal	59%
4	Greece	57%
5	Philippines	55%
6	Turkey	54%
7	Mexico	54%
8	Argentina	53%
9	Italy	52%
10	Israel	51%
11	Poland	51%
12	Spain	50%
13	USA	50%
14	Romania	49%
15	Switzerland	48%
16	Austria	48%
17	Taiwan	48%
18	Ireland	48%
19	Thailand	46%
20	Vietnam	44%
21	Australia	44%
22	Germany	44%
23	New Zealand	44%
24	Canada	43%
25	Hong Kong	42%
26	Malaysia	42%
27	Singapore	42%
28	Indonesia	41%
29	UAE	41%
30	France	41%
31	Netherlands	41%
32	UK	40%
33	Saudi Arabia	39%
34	Belgium	36%
35	Sweden	35%
36	Egypt	34%
37	Czech Republic	33%
38	South Korea	32%
39	Denmark	27%
40	Japan	23%

ENVIRONMENT & EQUAL RIGHTS

Artists have long used their music to take a stand against inequalities and injustices towards both people and planet. In the 1960s, musicians like *Nina Simone* spoke out against racial inequality as part of the Civil Rights Movement in the US. In 1970, *Joni Mitchell* released her iconic song, *Big Yellow Taxi*, decrying the impact of industrialisation on the natural world.

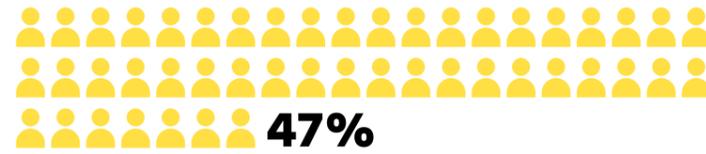
As the urgency of climate action has become increasingly apparent, industry players have become increasingly dedicated to values-led business practice including a focus on sustainability. Many artists (such as *Lorde* and *Billie Eilish*) have partnered with the non-profit, REVERB to make their tours more eco-friendly by reducing single-use plastic and composting or donating any food not consumed by backstage crews. Environment and Sustainability was also the most discussed topic on panels at the International Music Summit in Ibiza in April 2022.

There's a stereotype that older people care less about issues around social change than younger generations. According to the evidence that just isn't true. 48% of 55-64-year-old respondents and 47% of 16-24-year-olds think that helping the environment is important to them. When it comes to equal rights, older age groups are even more passionate than younger ones, with 67% of 55-64-year-olds believing everyone should have equal rights versus 60% of 16-24-year-olds.

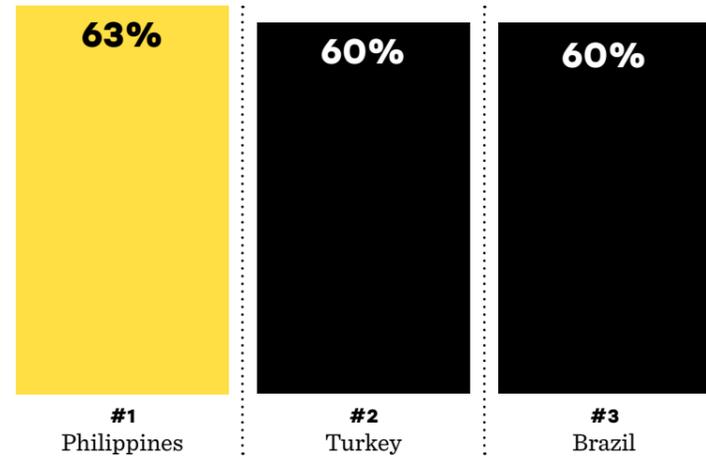
48% of 55-64-year-old respondents think that *helping the environment is important to them.*



% of respondents who said that helping the environment was important to them



The Top 3 countries that believe helping the environment is important



Teenage environmental activist *Greta Thunberg* has been in the public eye since she started her School Strike for Climate in 2018 outside the Swedish parliament. Her role as the voice of the 21st-century climate movement has connected her with some big names, including in the music industry.

In 2019, she collaborated with *The 1975* on a track from their album, *Notes on a Conditional Form*, which featured her 5-minute-long speech calling for a reduction of greenhouse gases. The music video for the track has over 3 million views on YouTube. In the same year, a clip of *Thunberg's* speech was also projected on stage during the interval of *Biork's* Cornucopia concert tour. In October 2022, the two collaborated again speaking together publicly for the first time on a podcast for *The New Statesman* to discuss protest, art, and the climate crisis.

"I saw *Greta Thunberg's* speech at *Glastonbury Music Festival 2022*... I feel like music and social activism are perfect partners. The same sense of community you feel listening to live music with others in a crowd is replicated when you hear a powerful message about important issues like climate change on the same stage."

* Female, 16-24, UK *



Younger people use music to develop their cultural identity

BRAZIL & SERTANEJO

Música Sertaneja or just "Sertanejo" is one of the most popular local music styles in Brazil. The word literally means "country person" and sertanejo is a mixture of pop and traditional country music.

It originated from the rural regions of central Brazil in the 1920s, where musicians sang stories of rural life and romantic ballads. They often consisted of a musical duo playing traditional instruments like accordions and acoustic guitars, but in recent years, the genre has evolved to welcome contemporary sounds leading to the creation of further subgenres. Sertanejo universitário for example mixes the original style with dance music such as Arrocha, and it has been given its name due to primarily being played at college parties. Sertanejo has fans worldwide, especially since the European success of Michel Telo's *Ai Se Eu Te Pego* in 2011. The global recognition and widespread popularity of the genre was documented in Netflix's 2020 documentary, *Amor Sertanejo*.

MUSIC AND LOCAL CULTURE

For centuries, music has been completely intertwined with local culture. On a regional and national scale, music is hugely significant in forming the cultural identity of a community. Much like with food, music provides a sense of comfort and connects people with their heritage. From K-Pop in South Korea to Grime in the UK, different areas produce unique sounds and genres that, thanks to globalisation, can now be shared with the world.

Younger people are more likely to listen to music with the purpose of connecting with their culture. A third (33%) of 25-34-year-old respondents listen to music for this reason compared to less than a quarter (24%) of 55-64-year-olds. Could this point towards the importance of music in the development of cultural identities during adolescence?

33% of 25-34-year-old respondents *listen to music with the purpose of connecting with their culture.*

66% of people in South Africa believe *music can be a powerful agent for change in society.*

“ ”

I LISTEN TO MUSIC TO CONNECT TO MY CULTURE.

TOP 40

1	Brazil	41%
2	Philippines	40%
3	Poland	40%
4	Thailand	39%
5	South Africa	39%
6	Turkey	38%
7	Saudi Arabia	37%
8	Hong Kong	36%
9	Israel	36%
10	Vietnam	36%
11	UAE	34%
12	Mexico	34%
13	Portugal	32%
14	Spain	32%
15	Argentina	31%
16	Romania	31%
17	Taiwan	30%
18	Indonesia	30%
19	Italy	29%
20	USA	29%
21	Greece	28%
22	Canada	27%
23	Malaysia	26%
24	Egypt	26%
25	France	25%
26	South Korea	25%
27	Ireland	24%
28	Switzerland	23%
29	Singapore	23%
30	Australia	23%
31	New Zealand	22%
32	UK	22%
33	Belgium	22%
34	Netherlands	21%
35	Austria	20%
36	Germany	20%
37	Sweden	19%
38	Czech Republic	18%
39	Japan	18%
40	Denmark	16%

Local music and events are more important to Millennials



16-24
26%



25-34
30%



35-44
27%



45-54
22%



55-64
18%

I love to support local artists or go to local gigs.

26% of people surveyed love to support local artists or go to local gigs.

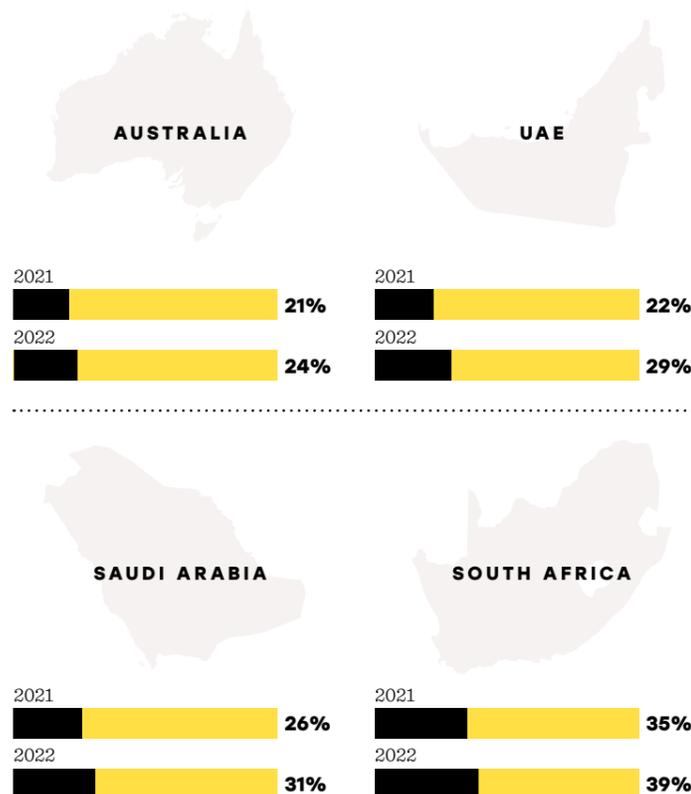
LOCAL ARTISTS/ GIGS

The lockdowns enforced during the COVID-19 pandemic had a devastating effect on local music economies across the world. Venues and nightclubs were closed for long periods of time and many closures remained permanent. A group representing live music venues in Europe, Live DMA, found that in 2020 and 2021 the pandemic resulted in 141 million fewer live music audience visits across the continent. Has this dampened our appetite for local music?

Perhaps. In only 4 of the 40 countries surveyed has there been an increase in support for local artists or going to local gigs since the first half of 2021, whilst the proportion of those in the other 36 countries has dropped slightly or remained level. Respondents in Australia, Saudi Arabia, South Africa, and UAE have all seen renewed enthusiasm in local music since the pandemic.

"I LOVE TO SUPPORT LOCAL ARTISTS OR GO TO LOCAL GIGS."

By country



TOP 40

1	Philippines	40%
2	South Africa	39%
3	Turkey	38%
4	Thailand	31%
5	Hong Kong	31%
6	Saudi Arabia	31%
7	Brazil	30%
8	Vietnam	29%
9	Portugal	29%
10	UAE	29%
11	Spain	28%
12	Mexico	28%
13	USA	27%
14	Argentina	26%
15	Greece	26%
16	Indonesia	26%
17	Ireland	25%
18	Poland	25%
19	Australia	24%
20	Switzerland	24%
21	Israel	24%
22	Romania	23%
23	Canada	23%
24	France	22%
25	Germany	21%
26	Egypt	21%
27	Italy	20%
28	UK	20%
29	Austria	20%
30	Belgium	20%
31	Singapore	19%
32	Malaysia	19%
33	New Zealand	19%
34	Taiwan	18%
35	Czech Republic	17%
36	South Korea	17%
37	Sweden	16%
38	Netherlands	16%
39	Denmark	15%
40	Japan	8%

SPOTLIGHT:

Digital data protection



The internet has brought societies face to face with many significant questions, not least the rules and regulations around tracking. Privacy and the right to be forgotten are critical concerns, and we worry about where and how we are being tracked, with different institutions eliciting different levels of concern.

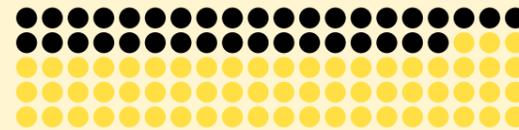
Commercial surveillance is the most significant source of associated anxiety in all 40 countries, in comparison with government tracking. Over a third of respondents (37%) worry about how companies track them compared to just over a fifth (22%) who worry about the government doing so. Spain and Greece appear in the top 5 countries for worrying about both governments and companies tracking their online activities.

Dealing with data-related anxieties is no easy task. People are concerned about their privacy but either do not know how to counteract it or maybe they feel as if actions are futile. Companies, including those in the music and audio industry must respect the privacy values of consumers and incorporate them into their business practices.

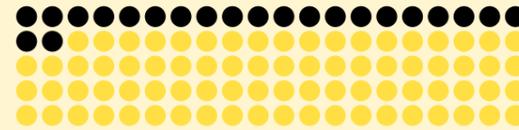


STATS AND THAT

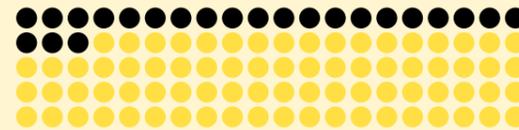
The way companies use consumers' data online gives people more anxiety than how the government uses it.



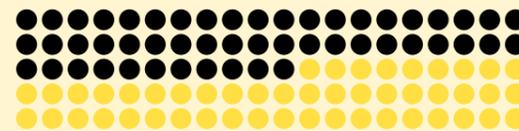
37% "I worry about how companies use my personal data online"



22% "I worry about how my government tracks me online"



23% use a private browsing mode or window on a regular basis



51% of people in Spain and Portugal worry about how companies use their personal data online

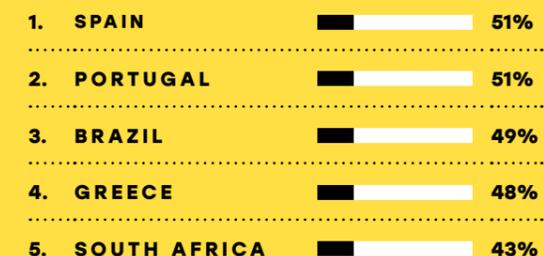
“ ”

I worry about how my government tracks me online.



“ ”

I worry about how companies use my personal data online.



“ ” People are concerned about their privacy but do not know how to counteract it.

A higher proportion of Gen Z have mental health conditions



How are you doing?

Wellbeing is having a moment. In this age of so-called 'perma-crisis' in which the world seems to lurch from one difficulty to another, we are told that we need to take care of ourselves and be mindful of our mental health. That we need to look out for our friends, families and communities.

ANDD discusses mental health and music.



NOT DOING SO WELL? YOU AREN'T ALONE

Mental health conditions affect many of us.



of our global sample reported having a mental health condition



regard themselves as prone to anxiety

Countries in the Global North, such as Australia, New Zealand, the UK, Japan and Germany, that are richer and better developed in terms of technological capacity than countries in the Global South, appear to be worst affected, or otherwise, more inclined to acknowledge the problem. The UK, for example, ranks 5th for concentration of people with a mental health condition, and 6th for proneness to anxiety.

Music cannot solve the problems we face as a collective, but it is a powerful tool that can stimulate actual biological pleasure. Many of us relied on it more significantly than usual during the pandemic, and our data reinforces the well-established relationship between music and well-being. Parents have sung songs to soothe babies around the world for centuries (the first evidence of a lullaby dates back 4000 years to the Babylonians!), and through the wonders of the Digital Era, humans young and old continue to use music to sleep.

One 3-hour mix on YouTube has over 371 million views with the not-so-succinct title "Relaxing Sleep Music • Deep Sleeping Music, Relaxing Music, Stress Relief, Meditation Music (Flying)". Whilst music might not be able to make you "(Fly)" it certainly helps with sleeping, relaxing, meditation and stress relief, and 50% of people use it for the first two in particular.

60% of us use music to boost our mood or to remind us of good memories. The link between music and memory is particularly important to those with dementia, and in recent years medical research has proven its benefits for patients. Music sociologist, *Rosie Mead* found in 2022 that familiar music can create positive

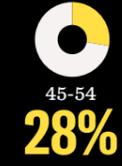
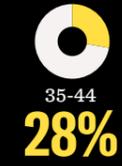
50% of people listen to music to *relax* or *help them sleep*.

environments for those with dementia, and build relationships with carers. In different countries and across different age groups, we are listening to help us feel better - whether through moving more, creating new things, calming down or falling asleep.

"My grandfather has dementia and often gets anxious about where people are. When we play his favourite music he starts singing along and he chills out. Music makes him smile, you can see how much it means to him."

✧ *Male, 16-24, UK* ✧

Young people are more prone to anxiety



“ ”
I HAVE A MENTAL HEALTH CONDITION.



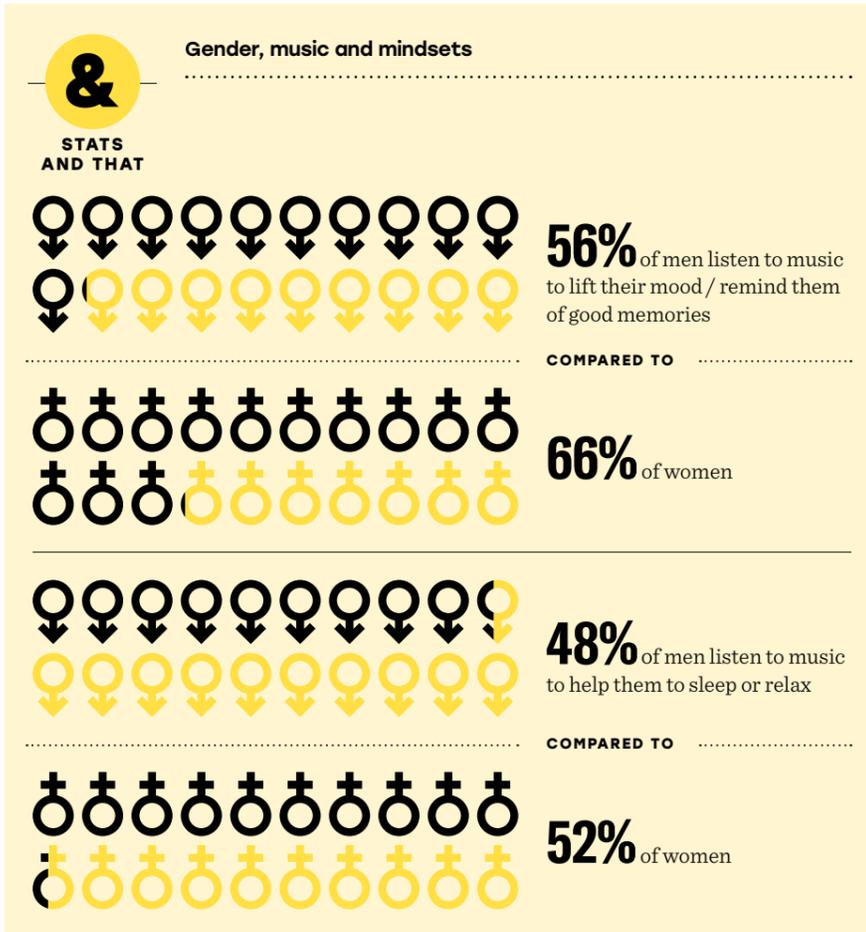
TOP 40

1		Australia	25%
2		New Zealand	22%
3		USA	21%
4		Canada	20%
5		UK	20%
6		Ireland	17%
7		Denmark	17%
8		Germany	17%
9		Sweden	17%
10		Austria	13%
11		Egypt	13%
12		Netherlands	12%
13		South Africa	9%
14		Poland	9%
15		Saudi Arabia	9%
16		Switzerland	9%
17		Portugal	8%
18		Spain	8%
19		Belgium	7%
20		Indonesia	7%
21		Brazil	7%
22		Philippines	6%
23		Greece	6%
24		Japan	6%
25		Singapore	6%
26		Israel	6%
27		Vietnam	6%
28		Taiwan	6%
29		Malaysia	5%
30		Mexico	5%
31		UAE	5%
32		Argentina	5%
33		Hong Kong	5%
34		France	4%
35		Thailand	4%
36		South Korea	4%
37		Italy	4%
38		Czech Republic	3%
39		Turkey	3%
40		Romania	2%

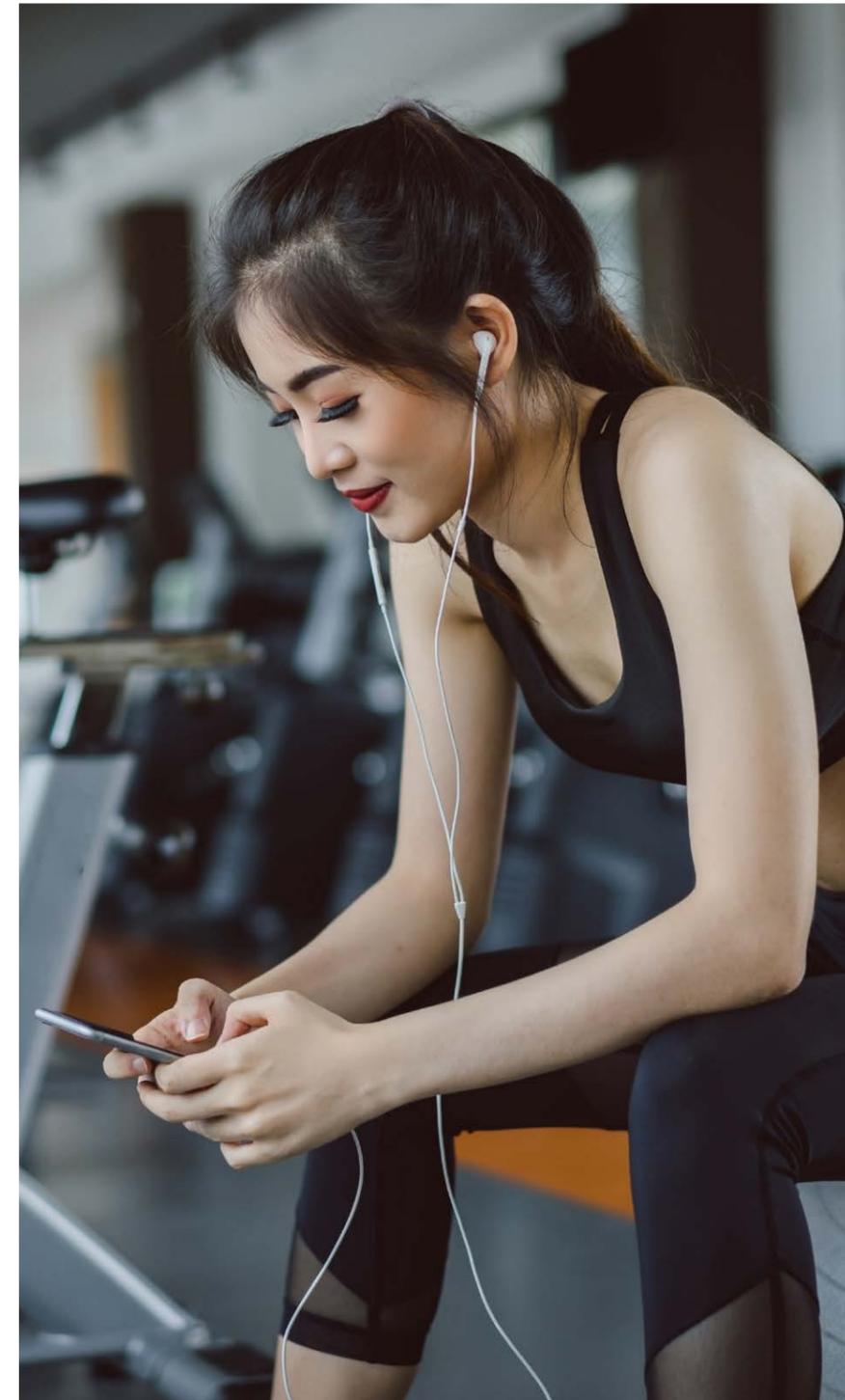
STRESSED, NOT SLEEPING, BAD MOOD? MUSIC CAN HELP

Too many of us are too stressed out too much of the time. Work, life, people, politics, inflation, climate change, COVID, it's a lot to handle. There are many ways of dealing with stress and lifting our spirits, some of which are unique to certain geographies, cultures, demographics and even individual households. For example, Jin Shin Jyutsu, the ancient art of harmonizing the flow of different energies – popular in Japan. Going to the pub to drown your sorrows? A very British thing to do. Music, however, appears to hold near universal significance. An average of 6 in 10 claim to listen to lift their mood and remind them of good memories, while half do so to relax or help them to sleep.

While age-based differences emerge across other reasons for listening, mood improvement and memories are just as popular reasons among every age group. 16 or 64, it doesn't matter, music provides a boost. Where differences do emerge is gender. Women are more likely to both listen to music to lift their mood / remind them of good memories and to relax or sleep than men.



61% of us listen to music as a *mood booster* or to *bring back good memories*.



MUSIC IS MY MOTIVATION
Ever gotten to the gym and realised you forgot your headphones? It's a bad moment. That's because music and exercise are perfect partners. Listening to the former whilst engaging in the latter has been proven to increase endurance, overcome pain and complete repetitive movements over and over and again. Our evidence demonstrates that nearly half of

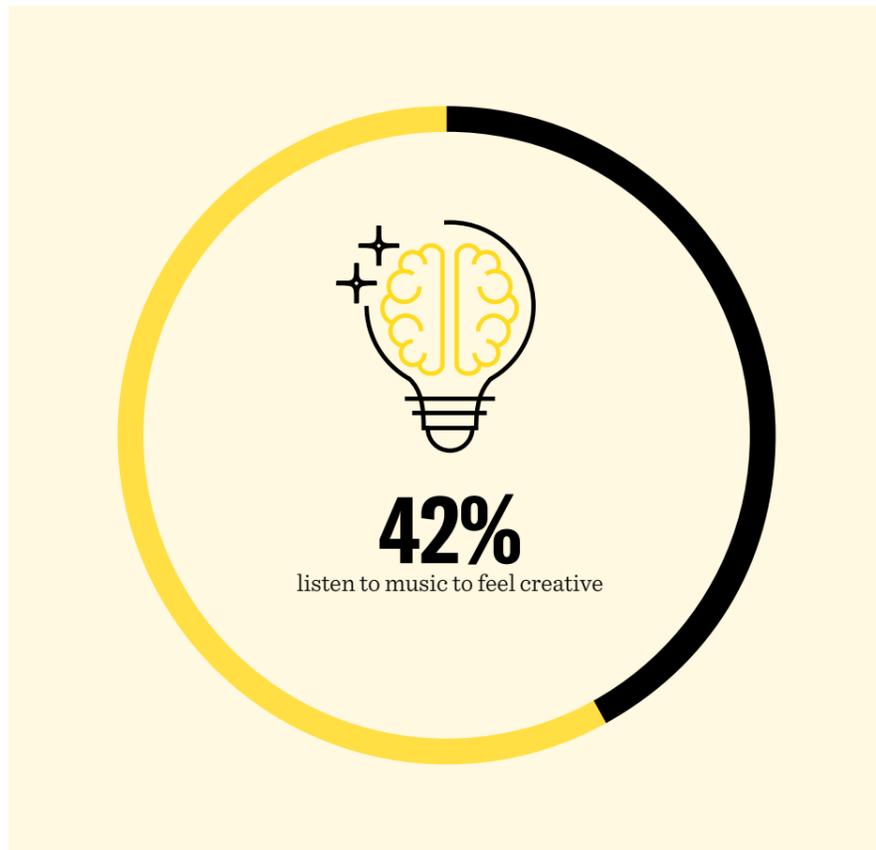
the global sample listen to music to exercise. This is particularly the case in Latin American countries, with all three surveyed – Argentina, Brazil and Mexico – emerging within the top 5 in terms of the proportions of the populations listening for this reason.

“ ”
I LISTEN TO MUSIC TO EXERCISE.



TOP 40

1	Mexico	63%
2	Argentina	56%
3	Spain	55%
4	Brazil	55%
5	Portugal	54%
6	South Africa	53%
7	Turkey	52%
8	Ireland	52%
9	USA	52%
10	Philippines	51%
11	Thailand	49%
12	Saudi Arabia	48%
13	Israel	48%
14	Poland	48%
15	Canada	47%
16	UAE	47%
17	Switzerland	46%
18	New Zealand	46%
19	Italy	45%
20	Hong Kong	45%
21	Sweden	45%
22	Australia	43%
23	Indonesia	43%
24	Austria	43%
25	Singapore	43%
26	UK	43%
27	Vietnam	43%
28	Taiwan	42%
29	France	42%
30	Malaysia	42%
31	Greece	41%
32	Egypt	40%
33	Denmark	40%
34	Romania	39%
35	Germany	39%
36	Belgium	37%
37	Netherlands	37%
38	South Korea	33%
39	Czech Republic	30%
40	Japan	19%



GET THOSE CREATIVE JUICES FLOWING

Creativity isn't usually mentioned in relation to wellbeing. But it should be. Research commissioned by BBC Arts back in 2019 found that engaging in a creative activity for even a very short amount of time has significant individual benefits – helping us to manage and escape stress and devise solutions to even the most difficult problems. And what helps us to feel creative? Music, apparently. Over 4 in 10 of those surveyed reported that they to music to help them feel creative. It makes sense, music is an expressive art form that can induce reflection and allow us to explore thoughts, feelings, and experiences from both the past and present.

16-24 year olds are *20% more likely* to listen to music to feel creative than 55-64-year-olds

SPOTLIGHT:

& what about artists' wellbeing?



Something disruptive is happening in the music industry and it isn't a new app.

Musicians and performers from different corners of the profession are speaking out about their struggles and taking actions to make their wellbeing a priority. Citing stress, burnout, exhaustion, demanding schedules, and increasing economic pressures that are adding to the reverberating effects of the pandemic, many have cancelled show dates and tours across the world. And this isn't amongst those trying to make it in the business-it is also major stars who have already achieved significant successes. *Little Simz*, *Sampa the Great*, and *Arlo Parks* are just three names amongst many who have cancelled tour dates for these reasons, prompting the very pertinent question, if they can't sustainably perform live shows in this climate, who can?

““““
If big artists can't sustainably perform live shows, who can?



METHODOLOGY

The data displayed in the report was collected by Global Web Index, an official partner of AudienceNet, as part of a global consumer tracker that spans everything from media consumption, to travel behaviours and social values. As a reflection on recent trends relevant to the music industry, the data pertains to Q1 and Q2 2022.

As a report that is truly global in scope, Audiomonitor tracks 40 nations, across all four corners of the globe. While sample sizes differ between countries, all are statistically and demographically representative of the respective country's 16-64 year old, online, population. Rigid data verification and professionally accredited panel provision ensures that the margin of error in the total data for each country is no more than +/-3%. The breakdown of the countries included, and their respective sample sizes are as follows:

Americas

Argentina n=2,688
Brazil n=13,579
Canada n=8,017
Mexico n=7,999
USA n=33,763

Asia Pacific

Australia n=9,175
Hong Kong n=2,127
Indonesia n=8,792
Japan n=9,644
Malaysia n=5,447
New Zealand n=2,434
Philippines n=5,855
Singapore n=3,521
South Korea n=2,481
Taiwan n=3,226
Thailand n=5,731
Vietnam n=3,882

Europe

Austria n=2,624
Belgium n=2,509
Czech Republic n=1,547
Denmark n=1,708
France n=12,677
Germany n=13,346
Greece n=1,760
Ireland n=1,901
Italy n=13,483
Netherlands n=3,264
Poland n=3,979
Portugal n=3,318
Romania n=1,603
Spain n=14,272
Sweden n=3,324
Switzerland n=1,927
Turkey n=2,700
UK n=12,616

Middle East & Africa

Egypt n=1,417
Israel n=1,892
Saudi Arabia n=1,285
South Africa n=2,885

UAE n=1,824

Collectively, the total number of respondents sampled within Audiomonitor is n=236,294.

Throughout the report analysis is commonly conducted at total level, with country-based top 40s. Regional, gender-based and age-based breakdowns are discussed where interesting.

Other countries continuously tracked but not included in this report: Chile; China; Czech Republic; Ghana; India; Kenya; Morocco; Nigeria; Norway; Russia.

&Add
Audiomonitor
Next issue due
SUMMER 2023

&Andd

Intelligent data.
Beautifully Designed.

For more information or granularity of the audio data we hold, and continue to track in 50 countries, please contact the authors of this datazine:

Lola@audiencenet.com
Anouska@audiencenet.com
Laura-Jane@audiencenet.com

For more information on our data visualisation services, please contact:

Lo@datadesignstudios.com