HUMANGRAPHEXPERIENCE

presents

MUSIC PERSONALITIES

Tell us what music you listen to and we'll tell who you are!

Music listening is no longer one channel focused:

The fragmented TV landscape lead to the dilution of the MTV generation:

% of target admit to watching...

23%	21%	12%
KISS TV	MTV	U TV

The need for music is also fulfilled by mass entertainment/ musical TV shows on big TV stations:

71% prefer entertainment

63% like music TV shows

1 ProTV is in top preferences with *Voice of Romania* and *Romania got Talent*

2 Antena 1 is next with *Xfactor* and *I know you from somewhere*

Due to the advancement of technology, music is listened to on various devices:

Internet

20% watch video/ listen audio materials weekly

23% use online audio streaming weekly

Mobile

16% use mp3s

21% listen to radio

22% view/ listen to movies/ music

Preferred music channel is often followed across media/ devices:

KISS TV

NO 1 watched music TV station

NO 1 listened to radio station

f NO 1 has the largest Facebook community among radio stations

The digitisation of music has two major implications:

1. New music is not released / premiere viewed on TV

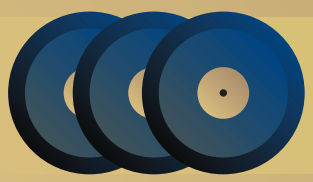
   Artists like Inna, Vunk and Delia Matache launched their songs and videos online.

2. It provides access to the back catalogue

   This has fuelled a huge appetite for older, previously undiscovered music, and has made room for some eclectic tastes.

Types of Music Romanians Listened to

Pop / Disco music is the most common preference, but it is complemented by Oldies but goldies music, Latino, Classical or Ambient music. Mixed music genres preferences are also reflected in top 5 on most listened to radio station.



Retro Revival Trend

There seems to be somewhat of a retrospective in music too. There's also a general renewed excitement about listening to old favourite tracks.

Live music preferences

Live music consumption is the most intense experience, albeit it has its limitations. Big concerts generally fulfill only one type of music preference and are mostly organised in big urban.

11%
took part in a free pop/ rock concert in the last 3 months.

9%
of the urban population went to a pop/ rock concert for which they've paid the ticket in the last 3 months

THOSE WHO GO TO CONCERTS AT LEAST TRIMESTRIAL ARE...

5% (492.000)
of the urban population

51% men
49% women

31 Average age

69%
are 14-34 y.o.

55%
Single

68%
Medium-high education or still learning

76%
Living in cities >=50k

Either with no income (23%, mostly youth) or with personal income >=1300 RON (28%)

GO TO PAID CONCERTS

81%
Pop/ Rock

33%
Classical music

20%
Jazz music

ATTENDED DURING THE LAST 6 MONTHS THE FOLLOWING FREE ACCESS EVENTS:

54%
Pop/ Rock concerts

35%
Museum/ art gallery exhibitions

25%
Theater plays

14%
Modern dance

14%
Jazz concerts

MOST CONSUMED MEDIA IS ONLINE, MORE THAN TV

2,5h

75%
go online daily, where they spend on average 2,5h.

www

85%
use their computer to access the Internet

47%
use their phone

40%
use audio streaming online, double vs. all urban

they can post the music they like; find about new concerts and with whom they can attend them; share their concert experience in real time via photos or music.

64%
Facebook is the space where they can express themselves

GOING TO CONCERTS MAKES THEM FEEL ALIVE

Are attracted by known brands, curious, impulsive. Like products that look good and are willing to pay more for services that improve their life.

They have an artistic inclination, an eye for beauty and sensorial uplifting moments or actions. This and other pampering moments help them relax and enjoy their lives.

Challenge is their middle name. Their life is at its beat right now, they don't regret anything from the past. They have an appetite for life and a desire to have fun.

'Dress to impress' is their motto, either when going to elegant events, or when being casual. Like to be admired.

Focus on their careers and reaching better social statuses. They like to be heard and consider themselves influencers in their group of friends.

MUSIC GENRE PROFILING

FREQUENT POP LISTENERS

They are balanced people, maintaining a positive attitude by reading books, watching comedies and performing physical activities such as nature walking and leisure sports.

Both men and women, with average age 36 years.

Majority with medium-high education

Evenly distributed in different urban areas.

Tend to have above average household incomes.

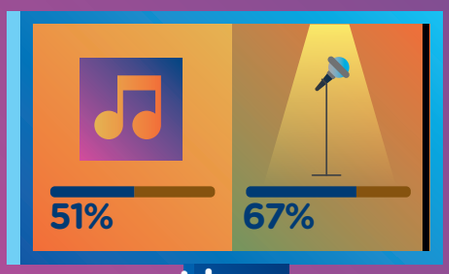
GUIDING VALUES:

To Believe:
in a clear purpose and in guaranteed success if they stay on the right track.

To Connect:
as a support for personal and professional development.

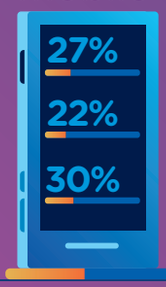
To Control:
be independent and rely on their own decisions.

THEY ARE SURROUNDED BY MUSIC, LISTENING TO IT IN A SIMILAR EXTENT ON MULTIPLE DEVICES:



at home

mobile



listening to radio

listening mp3s

watch music videos weekly

PC

radio

is listened to weekly by 30%

tune in to music TV channels

watch music TV shows

48% is their 2nd music listening device

45% are using PC for music listening purposes

43% listen online

63% listen on phone

THEY ALSO LISTEN TO

47% Greatest Hits

38% Latino

30% Rap/ Hip Hop

MUSIC SUPPORT

FREE MP3

Free Mp3 (only 9% bought online)

22% bought CDs

19% bought DVDs

19% participate at least yearly in pop/ rock concerts.

36% in any kind of free concert in last 6 months.

FREQUENT GREATEST HITS LISTENERS

They are conservative people, generally attracted by past: for them placing in time an event or memory is very important; are also attracted by history.

45 y.o

Rather women, with average age 45 years.

66%

Majority with medium-high education

59% Concentrated in medium and big urban

With house hold incomes in line with average population

GUIDING VALUES:

To Believe: in traditional systems, conventions and rules.

To Connect: with their families firstly, because this is the place where they find their support and charge their batteries

To Control: in order to be safe, they need plans and routines.

THEY LIKE THE CLASSICAL WAY OF LISTENING TO MUSIC:

44%

mainly on TV

Prefere VH1 and popular music TV stations (Etno, Favorit) to a higher extent than Utv, Mtv or Kiss Tv.

radio 39%

Mainly in the morning, at home. Prefer Romantic FM and Radio Romania Actualitati.

&

They prefer exhibitions and theatre plays to concerts.

THEY ALSO LISTEN TO

MUSIC SUPPORT

50% Pop/Dance

36% Latino

36% Unspecified

20% bought CDs

17% bought DVDs

They have one of the lowest presence at free cultural events: only **30%** attended a free cultural event in the last 6 months.

FREQUENT ROCK LISTENERS

They are very active, fully filling their time with diverse activities, from reading books to taking trips in the nature, while also working hard for a career. Like to experiment and are the ones with the highest participation to any type of concert or event.

36 y.o.

Rather men, with average age 36 years

53% are unmarried

72%

Majority with medium-high education

62%

Concentrated in medium and big urban

Tend to have above average house hold incomes

GUIDING VALUES:

For More: willing to experiment and career focused.

To Connect: have a reduced but very important group of friends.

To Control: having the freedom to make their own rules of living.

THEY APPRECIATE THE ARTIST MORE THAN THE GENERAL GENRE. THEIR FAVORITE WAYS OF LISTENING TO MUSIC ARE ONLINE & ON THE PHONE:

mobile

28% listening to radio

25% listening to mp3

31% watch music videos weekly

51%

24% listen to radio weekly

30% use audio streaming

36% use video streaming weekly

on the internet

49%

radio

44%

mostly Rock FM, Europa FM, Magic FM and Guerilla.

THEY ALSO LISTEN TO

70% Pop/Dance

48% Greatest Hits

40% Rap/ Hip Hop

MUSIC SUPPORT

FREE MP3

Free Mp3 (only 9% bought online)

23% bought CDs

21% bought DVDs

33% participate in least yearly to pop/ rock concerts.

45% in any kind of free concert in last 6 months.

FREQUENT CLUBBING MUSIC LISTENERS

They are progressive, oriented towards future, novelties and development. Are fast embracing new trends and propagate them in their social circle, having a high influencing power.

30 y.o.

Rather men, with average age 30 years.

64% are unmarried

69%

Majority with medium-high education

Evenly distributed in different urban areas

GUIDING VALUES:

For More: to read and be informed, to know everything that's new

To Something to happen: like to be provoked, it keeps their spirits up, makes them feel alive

To Control: being informed enhances their status.

THEY ARE ALMOST ANY TIME CONNECTED TO A SOURCE OF MUSIC. THEIR FAVORITE DEVICES FOR MUSIC LISTENING ARE THEIR PHONE AND THE INTERNET.

mobile

30% listen to radio

30% listen to mp3

39% watch music videos weekly

58%

28% listen to radio weekly

37% use audio streaming

44% use video streaming

on the internet

57%

prefer warm up programs on Kiss TV or U Nights on Utv.

on TV

56%

radio

43%

prefer evening warm up shows

THEY ALSO LISTEN TO

83% Pop/Dance

51% Rap/ Hip Hop

37% Latino

MUSIC SUPPORT

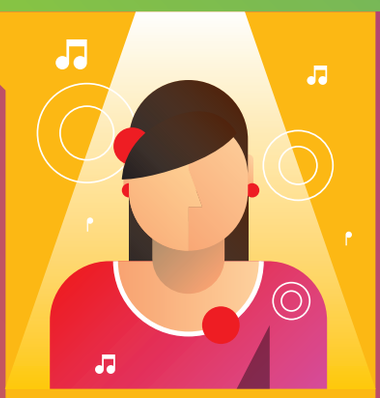
FREE MP3

Free Mp3, but they are the most buying online (15%)

21% bought CDs

19% bought DVDs

43% participated in a free concert/ event in the last 6 months.



FREQUENT

39 y.o.

Rather women, with average age 39 years

63% are married or in a relationship

69%

Majority with medium-high education

Concentrated in Bucharest

GUIDING VALUES:

LATINO MUSIC LISTENERS

Are sensitive to esthetics, being attentive to their own looks, having an active lifestyle which keeps their energy level up.

For More: very passionate about everything they do, they aim to achieve perfection

To Connect: invest a high level of emotions in each relationship

To Control: emotions are dictating to ration, they feel in control if they just feel.

MUSIC ENERGIZES THEM , FEEDS THEIR EMOTIONS AND RELEASES DAY BY DAY TENSIONS:

listen to music on TV, as background sound.

TV 51%

They listen to it not only on during the morning drive home, but also at home or during late working nights.

radio 42%

mobile 40%

- 23% listening to radio
- 18% listening to mp3s
- 23% watch music videos weekly

online 38%

- 22% listen to radio
- 22% use audio streaming
- 24% watch videos

THEY ALSO LISTEN TO

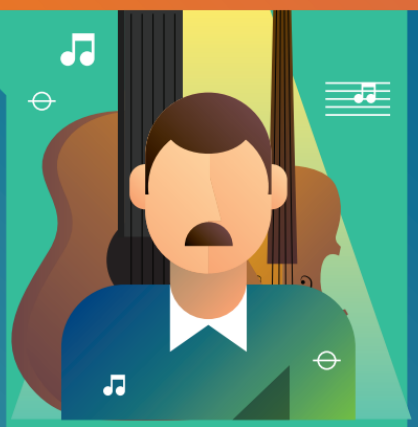
- **69%** Pop/Dance
- **62%** Greatest Hits
- **31%** Unspecified

MUSIC SUPPORT

FREE MP3

Free Mp3 (only 7% buy online)

- **22%** bought CDs
- **18%** bought DVDs
- **35%** participated in a free concert/ event in last 6 months.



FREQUENT CLASSICAL MUSIC LISTENERS

- Both men and women, with average age 42 years
- **58%** are married
- Majority with medium-high education
- **60%** Concentrated in big urban

GUIDING VALUES:

For More:

To Connect:

To Control:

Main attributes are style and elegance: besides classical music events, they also like to go to the theatre or visit museums/ exhibitions. Have strong life benchmarks like: long term friendships, a stable career , a harmonized lifestyle.

Alongside rock music listeners, they are most likely to play a musical instrument.

are appreciating quality things, that last in time.

being connected makes them feel valued and appreciated

by making informed and rational decisions

IN MUSIC AS IN LIFE, WHAT MATTERS FOR THEM IS BOTH THE PROCESS AND THE END PRODUCT.

Prefer former TVR Cultural and other niche stations (e.g. Mezzo), which besides music are broadcasting classical music related reportages

TV 44%

Listen to Romania Cultural, Romania Muzical, Romania Actualitati, Magic FM and Romantic FM.

radio 42%

22% listen to radio
21% use audio streaming
26% watch videos

online 39%

THEY ALSO LISTEN TO

60% Greatest Hits

58% Pop/ Dance

42% Ambient

MUSIC SUPPORT

24% bought CDs

21% bought DVDs

31% attended to a classical music concert, opera or ballet play in last year.

FREQUENT MANELE MUSIC LISTENERS

Appreciate simple things, comfort and don't miss a single occasion to have fun (most often simply a beer and a song played on the mobile phone is a good party occasion). Are more emotional than rational, relying rather on the inspiration of the moment than on logical arguments.

Both men and women, with average age 36 years

75% Majority with medium-low education

86% Low level employees or unemployed

Concentrated in medium and small urban

Below average household incomes

GUIDING VALUES:

For More: they want to achieve higher living standards, reflected in expensive material goods.

To be Taken Seriously: try to impose their point of view and consider that own achievements are most valuable if noticed.

To Control: in their circle of friends, they need to be perceived as being in control.

IN MUSIC WHAT MATTERS THE MOST IS THE RHYTHM AND THE MESSAGE, WHICH NEED TO EITHER AMUSE OR EMPOWER THEM. OFTEN TEND TO QUOTE SONG LYRICS , CONSIDERED TO CONTAIN LIFE LEARNINGS

prefere both folk and universal music stations

TV

56%

mobile

perfect tool for sharing latest music discoveries with their friends

47%

21% listen to radio

24% use audio streaming

28% watch videos

online

40%

Vali Vijelie and Florin Salam are most shared manele singers on YouTube.

THEY ALSO LISTEN TO

60% Pop/ Dance

49% Greatest Hits

45% Latino

MUSIC SUPPORT

FREE MP3

Free Mp3 (only 10% buy online)

19% bought CDs

16% bought DVDs

29% participated in a free concert/ event in last 6 months, the lowest participation as manele concerts are not often organized in small an medium urban.

Conclusions & Recommendations

The joy is in the discovery:

Include music discovery in experience design, from audio to visual, across multiple channels: most targets listen to & discover music on TV music stations, radio, online and on their phones.

Live music consumption is the most emotionally intense experience, albeit it has its limitations:

big concerts generally satisfies only one type of music consumption preference (pop/ rock); other preferences fulfilment is fragmented as they reunite smaller & multiple audiences; the participation in live music events is rather reduced and oriented towards free entry events.

Employ music to transform mood and unite communities even in the case of more fragmented music preferences.

Capitalise on the personal and emotional nature of music:

Use music as a creative canvas to fuel each type of music listener self-expression.

The music preferences are mixed and various, especially as a consequence of online opportunities:

all types of music listeners prefer also other different music genres, including new or older songs. Pop/ dance and greatest hits are the most versatile music genres in Romania.

Consider the role of older, previously unexploited music in your mix.

Ask for details from **consumer@ro.starcomworldwide.com**