The Universal Language Of Music

Music is one of the most powerful expressions the world has to offer. Regardless of race, religion, nationality, sexual orientation or gender, it has the power to bring people together.

It is one of the world’s greatest communicators. Even if people don’t understand the language of the song, it can still communicate different emotions and break down barriers between people.

Innovation and creativity are opening new opportunities for consumers, media and brands alike.

With the combined power of creative ideas, emotional appeal and smart technology, music has never been so important for brands and the advertising industry. Its impact is bringing state-of-the-art platforms, apps and gadgets that are transforming the music experience, with on-demand streaming becoming the dominant source of revenue in the industry and the most prominent way of consumption.

In 2018, the streaming revenue accounted for almost half (47%) of global revenue, driven by a 32.6% increase in paid subscription streaming. Last year represented the fourth consecutive year of growth, driven by great music from incredible artists in partnership with talented, passionate people from around the world.1

1 IFPI, Global Music Report 2019

US$19.1 billion is the value of the global recorded music market

IFPI, Global Music Report 2019

Democratised Access and Discovery

Revolution and Evolution

The start of the digital revolution in the mid-90s has democratised access, and piracy – a clear and present danger – has also made its move to the digital world.

Expansion and Growth

Today music streaming companies have established a renewed market that brings in expanded revenue.

Injection of Fresh Blood

New Models, New Players

Big-name tech companies and start-ups alike are experimenting with new technologies to enhance the music experience.

Personalised Experience

Cutting-edge platforms are personalising discovery and sharing experiences. Live music events are becoming multi-layered and multichannel entertainment experiences, with social media, AR and VR driving new ways to enjoy concerts and gigs.

Burning Down the House

Disruption and Independence

New innovations are also introducing AI, the interaction of humans and computers, big data and blockchain technology, with start-ups using cryptocurrency to disrupt the industry, ensuring musicians and everyone involved in the production and distribution process gets paid properly and fairly.

Old School Survives and Thrives

Unplugged and Organic

Beneath the surface of the technological zeitgeist, we are also witnessing a strong revival of analogue music, unplugged gigs and organic ways of discovering music.

Hipster and Cool

It is not just nostalgia. It is also retro, cool and hip to embrace non-digital and tactile media – with increased sales and renewed interest in vinyl records over the past decade.

Blasts from the Past, Reborn

The retro culture of music has been reinvented and re-energised with digital and smart tech.

Exciting, Creative and Innovative Campaigns

Limitless Possibilities

Music has always been a passion for people: it influences their lives and has been an effective marketing strategy for brands. But today, with new technologies and a fast changing cultural landscape, there are endless possibilities to generate creative ideas, to engage and entertain increasingly demanding music-loving audiences.

Functionality and Experimentation

Beyond Entertainment

Music creation and consumption is evolving into a more complex and holistic experience that is helping individuals with specific states of mind, moods and activities. Soundscapes, white noise and subliminal music are some of the sound experiments that brands are adopting to influence and change their behaviour.

Sound Identity

Brand personality resonates with the emotional value of music and sound, and with the rise of voice technology there is a renewed interest in audio branding and identity, becoming an important touchpoint in customer interaction.
CULTURAL INSIGHTS

MUSIC

Cultural trends and behaviours are creating fresh opportunities for brands and business growth. They are inspiring creative communication, visual and sound identities that promise to unlock brand and product innovation.

We have identified eight key trends in the culture of music that are influencing consumers, brands and media.
The Streaming Service Of The Future

In the not-so-distant future, we are going to look at the streaming services that exist today and laugh at how much work it takes to personalise and hear what we want to hear. The streaming service of the future anticipates the listener’s needs and hyper-personalises all content and recommendations. There needs to be full search and play functionality, but as we’ve learned from the past 50 years, the vast majority of Americans don’t know what to listen to. They are looking to be served a mixture of “what everyone is listening to”, music that is “new to them”, and their favourite artists and tracks.

Add in podcasts, news, weather, sports, comedy and other content types, and the future is an anticipatory, fully-immersive audio experience, personalised to who you are, who you are with, where you are, what you are doing and what we predict you want to hear. This programming is powered by signals coming from the proliferation of devices, ubiquitous connectivity, and driven by advances in machine learning and artificial intelligence. Effortless, personalized programming and discovery!

ALEX WHITE
VP CONTENT AND PROGRAMMING
PANDORA

Leading Streaming Platforms From Around The World

- NetEase Music, the Chinese streaming and download platform, has more than 400 million users
- Spotify, the leading music streaming service, has 207 million active users worldwide, with 96 million paying for a subscription
- Apple Music enjoys 56 million subscribers worldwide
- Anghami is the Arab world’s first legal music streaming platform and digital distribution company, with 55 million users
- Pandora has around 6.8 million paying subscribers (including Plus and Premium services)

A Growing Trend

55% listen to music streaming services weekly
Mindreader Wave 8, 2019

In the music streaming segment, the number of users is expected to reach 978.1m by 2023
Statista, November 2018, Digital Market Outlook
DISCOVERY AND PERSONALISATION

The music streaming service boom has led to a new and easier form of discovery. Curated and personalised playlists tap into consumers’ need to discover new music, both within a familiar genre and outside their norm.

The data available from streaming has given people the means to share music with others and review their listening habits, discovering how we interact with music every day in the process. As technology continues to innovate, AI and AR are giving consumers more ways to interact with melody and discover new tunes while on the go.

DROP AND DISCOVER

AudioDrops is a location-based “social playlist” app that lets users drop and collect songs at any location around the world. This appeals to music lovers who still crave recommendations from real people. AudioDrops enables users to “drop” their favourite songs in real-world locations on a virtual map, leaving them for future visitors to discover.

DISCOVERY THROUGH 3D SOUND

Bradley Cooper and Lady Gaga have charmed audiences with their undeniable chemistry in the latest remake of A Star Is Born. This time, the tale of a country rock star and an up-and-coming pop star features new songs from Gaga and Cooper. In an effort to highlight that music, Warner Bros (the studio behind the film, which is Cooper’s directorial debut) worked with Spotify to produce a video ad with 3D sound.

Music Discovery And Personalisation More Likely To Match Tastes

What is your opinion on receiving personalised music recommendations through streaming platforms that are based on listening habits?

- Sometimes it matches my taste: 54%
- It matches my taste: 21%
- It always matches my taste: 16%
- I don’t care what they recommend: 6%
- Do not match my taste: 3%

Discovering Our World Through Music

Discovery is about connection. Some use discovery to aid in fitting in; others use it as a means of showcasing their individuality. More developed markets, like the US and UK, find people seeking out what’s unique about their culture and identity. In a global-fuelled world, what’s local is prized because it’s harder to access. For emerging markets, such as Mexico and Indonesia, consumers look to discover and share things found from around the world—a sign of being worldly and knowledgeable in their home country.

Leveraging Discovery For Your Brand

Humans crave discovery. By better understanding this innate need, brands have a unique opportunity to build a connection with consumers while gaining their trust. Brands, specifically global brands, need to understand what motivates a consumer to discover and how this discovery can help them to define who they are, or understand others in the context of their environment. We all remember the first time we discovered our favourite band, and the excitement we felt sharing it with others. How can your brand tap into discovery to build that level of connection with your consumer?
The music industry has a love-hate affair with technology. The transition from analogue to digital disrupted the establishment to give way to start-ups developing technology that allowed everyone to own and share content on a massive scale.

Smart tech is transforming the music experience at every level, from artists using AI to write music, to consumers attending virtual concerts, and to audio devices adapting to personal hearing needs. Today, the ways people are interacting with music is evolving and taking on a new dimension, with smart tech proving to be a strong channel for brands to reach consumers.

**MAGICAL MYSTERY TOUR**
“Björk Digital” is an immersive virtual reality exhibition that presents the digital and video works produced by the collaboration of the iconic Icelandic artist and some of the world’s best programmers and visual artists.

**IN-GAME CONCERT**
Millions attended a unique live concert starring masked DJ Marshmello while playing the video game Fortnite. The concert was entirely virtual, halting the usual gameplay to allow everyone to attend.

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**Immersive Experiences Are Cutting It**
From immersive VR and AR experiences from a variety of musicians (eg, The Who, Björk, Megadeth, Taylor Swift) to the world’s most famous holographic pop star Hatsune Miku, fresh tech is pushing the envelope of the achievable.

**Unavoidable Disruptions**
75% of consumers use their home assistant to stream music
- LSN Global, 2018

74% think technology is progressing faster than society

55% are tech-augmented users
- Mindreader Wave 9, 2019

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**Radical Transformation**
Would you attend a virtual concert that is accessed using Virtual/Augmented Reality or live streaming technology

Yes 35%
No 34%
I don’t know 31%

Mindshare, Music Behaviour (11 markets), 2019

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**The Lens of Gaming**
Gaming is no longer a small culture, it impacts on the mainstream and can provide the music industry with a lucrative strategy to unlock a person’s world. For example, YouTube Gaming has a significantly larger audience than Netflix globally. This is primarily due to Fortnite – as an individual title it has more streams on YouTube than the whole of Netflix globally. Gaming can clearly offer the music industry a huge strategic opportunity: 1) to increase its sales and streams 2) and also give it wider cultural relevance.

From a brand’s perspective, it has wider significance, too. It provides brands the opportunity to integrate with this culture as part of its sonic identity. This could be done through producing original music to be placed in a game, a much simpler way of connecting with both cultures. The gaming industry generates increasingly new ways for consumers to discover music, as well as for musicians and labels to find new audiences who traditionally they would not have marketed to. That is now due to the significant size and scale of gaming culture. The convergence of the entertainment industry through gaming culture provides the biggest opportunities to unlock consumer lifestyles through content, culture and circulation.
DIGITALLY MADE MUSICIANS

In the past, musicians seeking fame would do so via traditional channels (e.g., record companies; TV, radio and live shows), but today, social media, streaming sites and new technology are giving them new platforms to create and release music, building a fan-base independently.

The rise of platforms and products that empower artists give them the opportunity to take full control of their content. Through data and algorithms, new artists are able to increase their reach with little to no effort.

Crowdfunding Talent

PledgeMusic is one of the largest sites for crowdfunding music, a way for artists to engage with and build a fanbase. The company works with the UK’s NME to highlight emerging bands. PledgeMusic says more than 80% of music-crowdfunding projects reach their goal.

A Star is Born

RISE is Spotify’s programme for up-and-coming musicians, designed to identify and break the next wave of music superstars. RISE is a powerful platform and an investment towards the future of emerging artists and the fans who discovered them first, an opportunity for brands to tap the potential of digital-made musicians.

New Business Models For A Simplified Music Industry

We are seeing the emergence of user friendly Dapps (decentralized applications) for starters, such as SOUNDAC. These new blockchains and Dapps don’t require the user to buy cryptocurrency in advance before using the product, which is huge! Crypto, blockchains and Dapps are going to slowly replace the traditional internet. The App store will soon be a Dapp store. Musicians will now enjoy a transparent and simplified music industry. Most of the middlemen in today’s industry exist just to help you navigate the space, get your music out there registered, reach fans and funnel your royalties to the proper rights holders. Most of this is being massively disrupted right now.

There are opportunities for brands to tap into emerging talent using cryptocurrency. For example, on PeerTracks.com, you will soon be able to support artists with your stake of SOUNDAC tokens (called XSD). The user would basically be promoting the artist’s content. The artist will see who his biggest supporters/promoters are and can reward them with shoutouts, free tickets to a show or, advertiser giveaway. Imagine getting a push notification from your favourite artists saying “Thanks for the support, have a free pizza on me! Cheers!”.

Use Streaming Platforms To Find Emerging Artists

Consumers and Creators Have Embraced Streaming As The Main Platform To Listen And Release Music

70% of a streaming service’s total revenue is paid to creators — a larger percentage than a typical record store, and in line with iTunes’ remuneration for digital downloads.

Types of Music Artists People Follow on Streaming Platforms

83% Mainstream
62% International
60% Independent
42% Local

Mindshare, Music Behaviour (11 markets), 2019

Leading Streaming Platforms From Machine Creativity

There’s an entire industry built around Big Data, AI and machine-learning services for creating music: Flow Machines, IBM Watson Beat, Google Magenta’s NSynth Super, Jukedeck, Melodrive, Spotify’s Creator Technology Research Lab, and Amper Music are just some of the systems using deep-learning networks, a type of AI that’s reliant on analysing large amounts of data.

Disruption and Independence

Blockchain, cryptocurrency and Bitcoin are some of the innovative ways musicians are ensuring a state of independence. For example, Monero is an open-source cryptocurrency platform that counts on 45 musicians accepting the privacy coin and offering discounts to those paying with cryptocurrency in their online stores – from Dolly Parton to Lana del Rey, from Morrissey to Marilyn Manson.

A Side, How cryptocurrency is changing the music industry, 2018

Billboard, Why Music Streaming Is Good for Creators and Consumers, 2018

Use Streaming Platforms To Find Emerging Artists

Consumers and Creators Have Embraced Streaming As The Main Platform To Listen And Release Music

70% of a streaming service’s total revenue is paid to creators — a larger percentage than a typical record store, and in line with iTunes’ remuneration for digital downloads.
VINTAGE AND NOSTALGIA

Even though we are choosing to access more of our music digitally, many individuals are still grasping onto the old ways of listening and discovering new sounds. The vintage music scene is considered a hipster and niche movement for many young music fanatics driving vinyl sales, along with Gen X and older generations, who grew up with this format.

Nostalgia manifests in different forms. More technologically advanced countries, such as Japan, find themselves consuming analogue and traditional media when accessing music. And to bring a more updated form of experience, advanced technology is enabling consumers to tap into their nostalgia in innovative digital ways.

AUGMENTED VINYLS

The Lava app, developed by Wieden & Kennedy Amsterdam, brings the vinyl experience to life via augmented reality. Virtual moving psychedelic sculptures with a 70s vibe emerge from the record as it spins on the turntable. The first album to utilise the app is the debut from Dutch band Necessary Explosion. The sculptures react and adapt as you move around them. The app works with Spotify and Apple Music.

ENCAPSULATED TIME

Nostalgia on Spotify is discovered via algorithm. The Your Time Capsule platform uses data and personalisation at scale to take their users back in time to their teenage years. It brings on the memories with two hours of iconic tunes.

Vinyl Revival

• Record Store Day 2018 vinyl sales hit an all-time high, with 90,000 records sold in the UK alone on the day (60,000 albums and 30,000 singles), a 16% increase on last year, according to the Official Charts Company.

• In the US, 773,000 albums were sold on vinyl in the same week – 24,000 more than in 2017.

• The annual event, now in its 11th year, aims to tempt lapsed record buyers back into local, independent stores.

It’s an Emotional and Tangible Experience

Going to a record shop and buying a vinyl record is...

<table>
<thead>
<tr>
<th>Experience Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>An emotional/nostalgic experience</td>
<td>54%</td>
</tr>
<tr>
<td>A physical/tangible experience</td>
<td>21%</td>
</tr>
<tr>
<td>A hobby</td>
<td>16%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
</tr>
</tbody>
</table>

People still buy CD’s and cassettes

Bought a CD/cassette in the last 6 months

50%

Cultural Tradition And Heritage: Core Consumer Values

74% say that keeping alive local traditions, heritage and culture is important for our society

60% love brands and products that have a heritage

Nostalgia, A Trigger For Brand Engagement and Purchase

I am more likely to buy a product if the brand uses a music soundtrack that reminds me of my childhood/youth

Cassettes Are Enjoying A Niche Comeback

• Taylor Swift’s album Reputation, Jay-Z’s 4:44, Lana Del Ray’s Lust For Life and Marvel’s Guardians of the Galaxy soundtracks have all been offered on cassette as well as in download and CD format.

• French company Mulann and National Audio Company from the US have seized the opportunity and rebooted production of music tape after two decades.
LIVE MUSIC EXPERIENCES

Technology and data are changing the way we experience live music, which is starting to add extra value and opportunities for brands to engage audiences. With the arrival of live streaming, VR, AR and holographic technologies, concert and festivals are acquiring a new level of immersion to enjoy.

Beyond technology, music festival goers of today are also seeking authenticity and emotional human and physical connection, as they want to take away memorable and meaningful experiences. Those experiences are essentially shared collectively, but the rise of individual media is shifting behaviour, especially for the younger generation who are having solo music virtual experiences and are willingly to attend gigs on their own.

Alive and Kicking
Coachella has an attendance of 250,000 people every year and over the course of its first weekend in 2018, YouTube’s official livestream garnered 41 million live views from 232 countries. The festival included a myriad of brand engagements: from HP’s Futuristic Experience to Heineken intimate shows.

Extra Dimension
The popularity of Spotify’s human-curated playlists Viva Latino! (9.6 million followers) and RapCaviar (11.4 million) has been boosted by live events. The music streaming service now produces popular live concert tours featuring the playlists’ most popular artists.

Meaningful IRL (in-real-life) Connection
It’s easier than ever to connect to people, but harder than ever to connect with people. Information overload in an increasingly digitized world is leaving us searching for deep human connection and emotion that we’ve lost in society today. Live music drives culture and brings society together, which is why festivals and concerts have never been more popular with more than two-thirds of 13-to-49-year-olds attending live music events around the world.

Influential Fandom and Brand Amplification
As trendsetters and cultural taste makers, the global live music audience is an influential one; they are 29% more affluent and 4x more likely to be highly-connected as micro-influencers (1,000+ social followers). Furthermore, they are 53% more likely to make large purchases than non-live music-goers (27% more likely than sports-goers). With 90% of fans believing that brands can enhance the live experience, it’s important that brands consider how they can invest in culture and harness this influence through all stages of the fan journey – how consumers discover, plan, experience and relive live music – to truly amplify the power of their message. Live music isn’t just magic for fans. It’s magic for marketers too.

Living In The Moment
When it comes to using a phone to record or live-stream live music, consumers think:

<table>
<thead>
<tr>
<th>47%</th>
<th>26%</th>
<th>23%</th>
<th>4%</th>
</tr>
</thead>
<tbody>
<tr>
<td>I prefer to live in the moment instead of recording</td>
<td>It allows me to have lasting memories stored in my phone</td>
<td>It allows me to share my experience and prove I was there</td>
<td>Other</td>
</tr>
</tbody>
</table>

Mindshare, Music Behaviour (11 markets), 2019

Going Solo
65% of 18 to 24-year-olds have been to a gig alone
98% wouldn’t be bothered by the idea of going alone

Dice, concert ticketing app research, 2017

Meaningful Cultural Experiences
62% are always looking for diverse cultural experiences and influences that will broaden their horizons
61% say that new experiences are more important than buying new things

Mindreader Wave 8, 2019

Highly Engaged, Receptive Audiences
In a first-of-its-kind biometric study at a St. Vincent concert, Live Nation’s “Power of Live: Global Live Music Fan Study,” in partnership with a McGill neuroscientist, found that live music provided an average 53% increase in emotional intensity among participants within the first moments. This openness and transference of positivity, “the emotion quotient,” can be applied to purposeful brands coming to life in the live music environment.

“People are more likely to value live music over sex in their lives”

“Music says more about us than our hometown, race or religion”

Live Nation, The Power of Live, Global Study, 2018
MUSIC AND BRAND COLLABORATIONS

Brands are harnessing the music industry by working with emerging and beknown talent, influencers and innovative tech businesses in new and reinvigorated ways. Music artists are more empowered than ever and can reach a wider audience with digital and social platforms.

Younger generations are engaging with brands endorsed by music artists – who are speaking up and taking distance from governments, and trust brands more as a way to reach people and affect change.

Collaborations can be created in many ways, from sponsoring talent to multi-layered performance and tech-enabled experience, to convey inclusion, diversity and purpose. In the era of personalisation, brands can also be the curators of playlists and promote artist discovery and album releases. The key is to bring together fans and artists, aligning brand values and sentiment for a culturally connected brand experience.

SONG AND PHONE CO-RELEASE

Google is promoting its Pixel 3 phone with musician Childish Gambino, in a video that also promotes his "playmoji", which Pixel users can install. He also introduced a snippet of a new song he is about to release.

POWERFUL DIGITAL MOMENTS

UMGB and National Geographic set a new benchmark for music and brand collaborations by uniting their audiences. Award-winning DJ artist Zedd created the original music for the series One Strange Rock (narrated by Will Smith and directed by Darren Aronofsky). This collaboration created powerful moments in digital media: +10m views in two weeks and 224 PR media outlets.

Shift In Endorsement

I would buy a product that has been endorsed by my favourite music artist

<table>
<thead>
<tr>
<th>Agree</th>
<th>Neither agree nor disagree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>39%</td>
<td>45%</td>
<td>16%</td>
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Rihanna’s fans are 3.7 times more likely to buy her products than fans of other celebrities. Her first Puma branded sneakers, part of her Fenty x Puma line, sold out in just 35 minutes.

Artists Have Less Fear Of ‘Selling Out’ To Brands

“Partnerships are now an important facet of the music industry. Revenue generated from such associations is now essential for artists to make a living.”

Liam Walsh, Ask Me PR founder (he worked in the music industry for more than 25 years and helped raise the profile of renowned musicians, including Oasis, Bjork, The Killers and Moby)

“Artists’ influence on culture is only becoming more impactful in today’s style landscape, with larger social media followings and attention in general”

“Musicians such as Pharrell Williams and Kanye West are selling 80% more celebrity trainers than those released by other influencers such as sports people”

Stadium Goods, 2018
**SOUND BRANDING**

Music and sound not only have an impact on emotions but can also influence behaviour on a functional level. With advances in technology enabling us to use sounds as a means to learn, think, create, motivate or improve our wellbeing, it is becoming more important for brands to understand that consumers interact with music on many levels and that sounds affect all areas of our life.

Consumer purchase journeys can be positively influenced by music, from the amount of time spent in a shopping environment to how much the customers buy. It can alter their perceptions surrounding them, and when a specific product is exposed to music. Understanding the right genre, tempo and volume can create a positive atmosphere for customers that increases in-store sales.

“Music is an effortless way to manage not only our feelings, but also how we function.”
Adam Sankowski, Music Therapist, Harvard Medical School

“Music is a great tool for memory retention: the fact that you have lyrics stuck in your head for days isn’t accidental... neuroscientists have proved that words heard to a melody are more easily remembered than words spoken.”
Paul Custance, Founder and CEO of British startup Lirica, which has developed an app to teach foreign languages using music

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**SOUND OF SUCCESS**

Mastercard’s sonic logo is the company’s latest venture into audio branding. It’s a strategy that involves creating and protecting an original piece of music, much like a visual mark works on paper. The six-note tune plays after every successful credit card transaction.

**MUSIC OF THE FUTURE**

Warner Music Group has become the first record label to sign an ‘algorithm’. Endel, a German sound startup, is embracing AI as the music of the future, and creating personalised music to help listeners relax, focus and fall asleep, with the end goal of real-time, adaptive soundscapes.

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**The Sound Experience**

Every brand is making sound. But is that sound designed and congruent with the visual messages the brand is delivering? That’s all forms of sound, not just music: The core element of a brand’s sound is usually a sonic logo. The auditory equivalent of a visual logo, these can be both powerful. Many brands have created iconic and very valuable sonic logos. For example, Intel’s is worth many millions of dollars; few people could draw their visual logo, but many can sing it.

There are several types of sound activation in marketing, from brand music and brand voice to soundscapes in physical spaces and earcons (short branded sounds such as a ringtone, online alert sounds or in-app sounds). It’s important to achieve consistency across all the brand’s expressions and touch points: carefully consider the sound of every type of brand experience and keep them all congruent and consistent across time and space. Sound is very powerful and can work for or against a brand. If undersigned, it is likely to be undermining all the effort put into visual branding. Smart brands are now thinking carefully about how they sound, not just how they look.

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**Mind-Altering Melodies**

How people feel when listening to music using the internet

- Relax: 44%
- Entertainment: 42%
- Learning: 18%
- Connection: 12%

Mindreader Wave 9, 2019

People mostly relax with classical music (56%), ambient/lounge (37%), movie soundtracks (32%) and soundscapes (32%).

Mindshare, Music Listening Attitudes and Consumption Formats (6 markets), 2019

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**Make Or Break A Brand Experience**

Audio branding agency PHMG, UK survey, 2018

- Believe music in marketing is more memorable than visuals: 60%
- It helps them feel more connected to a brand: 47%
- It helps them understand a brand’s personality: 45%

**In Sync With Our Senses**

Ads that closely linked their sound and visuals delivered on average 14% higher memory encoding than more passive soundtracks

Neuro-Insight, Tuning in to Sound, 2018

Ads that match the neuro-state of their programme context drive 25% higher memory encoding than unmatched context

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CULTURE VULTURE / THE POWER OF MUSIC

JULIAN TREASURE
CHAIRMAN
THE SOUND AGENCY
LOCAL REPORTS

The Scout Network is a group of individuals living in key cities all over the world, whose lives are immersed in the latest consumer trends, technologies and brands.
Our local Scouts have contributed with their observations and have identified the most emerging trends in music.
MUSIC CULTURE AROUND THE WORLD

Berlin
High-Tech Expectations

WEARABLES ARE BIG IN BERLIN
For a city that loves its techno, Berlin-born products are experimenting with innovative tech music experiences - from clothing that glows to the beat to wearables that amplify bass from your iPhone to your wrist.

MUSIC’S PAST PAVES THE WAY FOR BERLIN’S FUTURE
The history of music is still essential to Berliners in the digital age. There are vinyl shops throughout the city, even the cassette tape revival is still in full force.

BRANDED MUSIC CONTENT, BY CONSUMER DEMAND
In Berlin, artists and brands are held to higher standards than elsewhere. Brand collaborations have to be more creative and synergistic to make an impact: take Native Instruments’ work with Berlin producer junk-E-cat, which saw him use their beat-making instrument while floating in the sky.

Lagos
Creative Mix

AFRICAN STREAMING SERVICES
Due to limited access to global platforms, African streaming services such as MTN Music+ and Boomplay continue to be go-to for all things music.

MAKING MONEY THE BRAND AMBASSADOR WAY
Becoming a brand ambassador is an important and credible source of income for Nigerian artists. MTN has an expansive list of signed ambassadors, as does Nigerian-owned telecom company Globacom.

DIGITAL-FIRST NIGERIANS PAY HOMAGE TO OLD NOLLYWOOD
Gen Z artists are using retro-90s filters that mimic grainy Nollywood movies from yesteryear.

London
Independent & Inventive Spirit

FOR YOUNGER AUDIENCES, DISCOVERY HAPPENS ON YOUTUBE
It’s the easiest way to stream and find music, either through playlists set up by peers or by recognised YouTube channels. The most popular have millions of followers and provide subscribers with contemporary music every day.

BRITISH START-UPS USE AI TO HELP NEWCOMERS
For young producers, these technologies provide accessible and independent alternatives. AI Music, for example, responds to users’ input on melodies or structure.

LONDON’S INDEPENDENT SPIRIT LIVES ON THROUGH DIGITAL RADIO
More stations are following in the footsteps of platforms such as Soho Radio and NTS. These reflect the values of listeners: independent and curious, with a DIY attitude.
MUSIC CULTURE AROUND THE WORLD

Mexico City
Live & Tech Experiences

GLOBAL STREAMING SERVICES PAY RESPECT TO MEXICO’S HERITAGE
Spotify has made an extensive catalogue of regional music available. Smaller platforms including Oiid have followed suit by recording mariachi music, bringing regions together via sound.

A FESTIVAL OF FESTIVALS
Festivals cover a diverse range of genres and experiences, bringing great branding opportunities. Branded boutique festivals are the next big phenomenon, boosting a cultural crossover in the local landscape.

CROWDFUNDING PLATFORMS ARE SUCCESSFULLY LAUNCHING NEW BANDS
Agrupación Cariño used Fondeadora, a crowdfunding platform for creative, artistic and innovative projects to finance a documentary and a European artistic and innovative projects to a crowdfunding platform for creative,

Mumbai
Discovery Through Tech

IN INDIA, MORE PEOPLE LISTEN TO MUSIC ON THEIR SMARTPHONES THAN ANYWHERE ELSE IN THE WORLD
This dominance also means that India’s streaming revenue is higher than any other country’s. In fact, several streaming sites have been created solely for domestic consumers.

THE POWER OF COMMUNITY TO DISCOVER MUSIC
Live shows are transforming from straightforward performance into a connected community experience. Bypassing digital music services, intimate live shows are the way to connect with NY’s new music and cultural collectives.

New York
Immersive Cultural Hub

NEW YORK’S MUSICAL PAST PLAYS AN IMPORTANT ROLE IN THE CITY’S IDENTITY
Home to more record shops than any other US city, the resurgence of old-school music is everywhere in New York. Digital brands such as YouTube are getting in on the act, tapping into New York’s respect for musical heritage.

TECHNOLOGY IS CHANGING HOW MUMBAI LISTENS TO MUSIC
The introduction of voice assistants has had a far-reaching impact. Amazon’s Echo Dot, for example, has helped non-tech-savvy elders discover new types of music.

THE OPENING OF NEW VENUES IS DRAWING CROWDS ACROSS THE CITY
Mumbai once had a really high entertainment tax, deterring venues from opening. This has changed and now there are multiple stages for artists.

Seoul
Local Streaming Reigns

CASHING IN ON THE HALLYU WAVE
K-Pop has gone global, in no small part thanks to YouTube, Spotify and Twitter. The government is now cashing in on the popularity of Korean culture, with locations such as the K-Star Road being built to attract tourists.

KOREAN STREAMING SERVICES DOMINATE THE MARKET
Global platforms such as Spotify aren’t available in South Korea, so local streaming services such as GenieMusic, Melon and Kakao have a huge combined user base.

Shanghai
Future-Proof Music

THE GREAT FIREWALL OF CHINA HAS LED TO A SURGE OF LOCAL PLATFORMS
Services such as NetEase are filling the international gap, with more than 300 million users signing up in its first four years. Free-to-stream services and downloadable music are the main ways of music consumption within China.

Tokyo
Contrasting Scene

TRADITIONAL FORMATS ARE STILL POPULAR AS ARTISTS SHUN STREAMING PLATFORMS
In Japan, CDs hold 80% of the market share in music sales. Several big-name artists are still holding back their catalogues and latest releases from streaming sites.

SPRINGBOARD TO VIRTUAL SUCCESS
Ai Kizuna, the first virtual avatar, has become the country’s most followed character, with more than 2.3 million subscribers. Kizuna has released a series of new material and announced nationwide live concerts.

Technology is changing how artists produce and distribute music. AI is being used to assist with songwriting and composition, allowing musicians to focus on the creative process.

Japan leads the way for integrated technology in live performance
Projection mapping, AI, body sensors and drones are some of the technologies being tested on stage. NHK partnered with dance-pop group Perfume to showcase their innovations, promising AI and live-machine learning.

AI COMPOSING COULD BE THE FUTURE OF MUSIC
Take the electronic musician and code composer AYRTBH, who used AI to assist him with his latest album, On Songs of Anon. He programmed a standalone app to generate sequencing patterns to integrate into his music.
IMPLICATIONS FOR BRANDS

As media and consumer habits evolve, and as music affirms its position as one of the assets that increases value, brands need to create innovative and creative experiences, and understand what appeals to different audiences.
WHAT IT MEANS FOR BRANDS?

Engage With Content Around Playlists

MULTIPLATFORM CONTENT
Streaming platforms can help reach consumers through playlists, partnerships and content campaigns. This is an effective brand communication tool that can be activated through different platforms and devices.

MOMENTS AND MOODS
Consumer music-behaviour data can give brands an advantage to segment via taste and create campaigns to target and reach a desired audience via specific moments and moods.

DISCOVERY-PLUS
Implement new tech such as voice and VR to augment moments of discovery and combine digital/physical discovery experiences to reveal surprising moments, such as social sharing, geolocation, live event apps or soundtrack recognition.

Inspire With Cutting-Edge Experiences

UNDERSTAND THE VALUE OF TECH
Embrace and keep up with innovation and creativity. Enable opportunities to help people empower themselves.

RESONATE WITH YOUR AUDIENCE
Use different technology and data to target your audience (e.g., virtual pop stars and chatbots to target the younger generation; voice activation; unique message/content based on brand partnerships).

PERSONALISED VS COLLECTIVE EXPERIENCES
Create a campaign to invite consumers to unique experiences via tech. Amplify your product with music by incorporating technology through smart packaging.

Use The Right Mix

PAST AND PRESENT COLLIDE
Bring the live-music experience into the store/retail space. Explore various ways of doing this via tech-augmented technology. Create a nostalgic theme to emphasise the appeal of consumers who engage with memories of the past.

ICONIC SIGNIFIERS WITH A MODERN TWIST
Connect consumers’ emotions with a nostalgic yet cool campaign or brand identity (from product design to packaging, from content to experiences) to recall grand moments of the music past and pop culture.

CREATIVE PARTNERSHIPS
Collaborations with artists, start-ups and causes can introduce innovative ways for live music brand partnerships, with multi-layered immersive experiences reaching the more connected and tech-savvy consumers who are also interested in more meaningful experiences.

Innovate With Creative And Scientific Collaborations

FUNCTIONAL AND MUSICAL
Take a functional approach to understand the different effects of music on people. This will help brands connect in a closer way by giving consumers what they need at the right place and the right time – for example, moments of calmness, focus or energy at distinct stages of the consumer purchase journey.

NARRATIVE POWER
Use music in all its forms to tell stories in creative ways. Tap into deep emotions with a social media spin by using memes/viral messages and inviting people to be part of a cultural moment.

NEW TALENT AS BRAND AMBASSADORS
Brands can scout for the right new talent with the right soundtrack to be part of their branding, a partnership that would benefit both parties.

METHODOLOGY
Culture Vulture’s Framework is our approach to exploring and applying cultural trends. It serves as an inspiration to understanding the wider cultural context we live in and for creating new strategies and ideas for business and brand communications.

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