

The Shuffle Age: Global music fans unplugged

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Havas Sports & Entertainment's second edition of its FANS.PASSIONS.BRANDS study reveals that:

- 56% of people listen to at least 10 musical genres.
- The relationship between fans and their music passion can be categorised into eight Logics of Engagement.
- The meaning and place of music for fans varies widely by country and age group.
- Brands need to understand the motivations and behaviors of music fans in order to target them effectively.

Music is the most universal of passions and an effective channel for brands looking to connect with target audiences through what they love. FANS.PASSIONS.BRANDS, Havas Sports & Entertainment's research into sports and entertainment fandom, in partnership with the University of Southern California's Annenberg Innovation Lab and Havas Media's "18" innovation hubs, takes an in-depth look at people's passion for music: what they listen to, how, where, and why, as well as their relationship to brands in this space. Global in scope, the research surveyed 18,000 people across 17 countries.

The "Shuffle Age"

The results of FANS.PASSIONS.BRANDS reveal a growing trend in music that owes its origins to the digital revolution. Due to the boom in the number of ways one can listen to music thanks to streaming and online downloading, and therefore expanded access to music overall, the variety of genres that people listen to has exploded. This has given birth to a new age of passionate listeners who consume many styles of music: The "Shuffle Age".

These music fans represent a major part of the population: 56% of people listen to at least 10 music genres. These fans are eager to discover new music and new musical experiences, which brands can play a role in facilitating.

The why and how of music fandom

In order for brands to engage multi-genre listeners, they need to understand why people listen to music and what it brings them. FANS.PASSIONS.BRANDS expands on Havas SE's unique approach to fandom, as this research analyzes fans through their behaviors, attitudes and perceptions called the Logics of Engagement, as opposed to other fan studies that look at fans through levels or hierarchies (superfan, casual fan, etc.).

The study applies eight Logics of Engagement to music fans:

1. The Logic of Entertainment - enjoyment of the overall experience & atmosphere

For example, fans who enjoy the spectacle of a concert as much as the music.

- **The Logic of Immersion - will to lose oneself in the emotion of the music**
For example, fans who think of nothing but the music they are listening to.

- **The Logic of Social Connection - desire to create or enhance relationships with other fans**

For example, fans who feel connected to a community through the music they love.

- **The Logic of Identification** - strongly associating music with one's personal background

For example, fans who enjoys music that connects them to their cultural origins or a certain time and place in their lives.

- **The Logic of Advocacy** - debating and promoting one's opinions about musical taste and other music-related issues

For example, fans who defend their opinions about music.

- **The Logic of Play** - virtual or real life participation in activities related to music

For example, fans who grew up playing music or singing, and may still do so.

- **The Logic of Mastery** - interest in learning and understanding the details behind music

For example, fans interested in the science/theory behind music (how vocal cords work...).

- **The Logic of Exploration** - desire to discover new songs, artists, genres, venues etc

For example, fans who listen to new artists at a music festival.

Differences between countries and age groups

Music fans engage in their passion differently country by country. For example, the festive culture of Brazilians make them the fans that engage most strongly through the logic of Social Connection (62%), whereas 9 out of 10 Chinese fans engage through the logic of Play.

Furthermore, age matters. Young fans aged 13-17 engage the most strongly through Immersion when they listen to music (64%). A majority of fans that are 35 and older engage through the Logic of Exploration (59%). This logic distinguishes the second edition of FANS.PASSIONS.BRANDS from the first, as it is a logic that stands out in music. The appetite for the new has been growing, as confirmed by the Shuffle Age and their multi-genre listening habits.

Insights for brands

The most engaged music fans live out their passion through five main logics: Immersion, Mastery, Advocacy, Play, and Exploration. These active fans are aware of brand sponsorships and are more likely than the average person to buy the products and services of sponsors, and even to recommend brands that are involved in their passion. A majority (55%) agree with brand music partnerships, such as the sponsorship of festivals or artist endorsements.

Looking beyond the most avid music fans, each logic of engagement represents a way to connect, and an opportunity to reach music fans. Brands should look to become the catalysts of engagement for one or several logics at a time by nurturing the right conditions.

A brand could facilitate Social Connection and Exploration at the same time by developing an online music platform, or partnering with one, to deliver new music content. The possibilities are multiplied through this new approach that opens doors to sponsor brands, or those looking to communicate through music.

Fredda Hurwitz, Chief Strategy Officer, Havas Sports & Entertainment commented:

"Music is an extremely effective marketing tool for brands looking to connect with people, as long as you can understand this passion and what drives it. Finding logic behind something that many feel cannot be explained is exactly what this research is about. We call this the Logics of Engagement, breaking music fanship down into behaviours, attitudes and perceptions in a way that can be understood and leveraged by brands to connect with their target audiences through valuable content and experiences.

"In order to capture the digitally native 'Shuffle Age' fan that engages through the 'Logic of Exploration', brands can help them discover new artists across music genres, thus creating unique meaningful moments they would like to share."

Andrew Ross, Managing Director, Havas Sports & Entertainment South Africa, says:

"As worldwide proprietary research, you don't get more 'ear to the ground' than with the FANS.PASSIONS.BRANDS survey. And to have South Africa data included is a huge coup for us as a company working in the South African Market."

About the research

The FANS.PASSIONS.BRANDS global survey was conducted in May 2015 across 17 markets - France, Spain, UK, Germany, Italy, Portugal, Poland, Russia, South Africa, the USA (including a specific focus on the Hispanic community), Mexico, Brazil, Colombia, Chile, Argentina, China and Belgium. The research method involved online questionnaires given to a total of 18,000 people, aged 13+, carried out by YouGov.

This wave focusing on music is the second of a set of yearly deep dives into one specific passion, which follows the 2014 edition on international football.

Further findings will be released at the end of 2015.

Discover more findings in our music fans infographic:

<http://we.tl/u7lZ2nncjx>

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