

Music 2.0 is here

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Music is mid-revolution. It's a quiet revolution but a sure one. While marketers and industry experts spend time debating the impact of new technologies, Asia's youth are simply using them... or are poised to do so.

In research conducted as part of the Music Matters conference, MTV, Branded and Synovate, surveyed over 3,800 city-dwelling 15-34 year olds in 10 Asian markets to find out how passionate they are about music, what music-related activities they engage in and their attitudes towards a digital future for the industry.

30 million young urban Asians can't be wrong

More than half the region's urban 15-34 year olds have played music on a computer in the past month - that's 30 million people. There are as many as 84% engaged in this activity in just four of China's large cities*.

"Digital capability is now the norm in Asia and digital music provides an enormous opportunity for all sorts of industries. Our survey showed its potential to act as the glue to bind the music, technology, telecommunications and entertainment industries together as they engage with young consumers in Asia," said Synovate's media research director for Asia Pacific, Craig Harvey.

Other findings show:

- More than half have listened to music on a digital music player - 53% across Asia
- 27% of these young Asians have downloaded and saved a song to their mobile, with the figure rising to a third or more in China, India and Malaysia
- Looking to the future, two out of every five respondents expect that all their music will be in digital format in five years and a further 31% expect to be playing CDs as well as other digital formats
- User-generated content is making serious waves across Asia, with a third of all respondents viewing other people's content on a website. It's even more of a trend in Hong Kong and Taiwan with 70% and 67% reporting this activity in the past month
- Blogging is a mainstream activity in some markets, with 30% of Hong Kong's 15-34 year olds and 29% in China writing or uploading content to their own blogs in the past month

Mobile music rocks my world

More than half (57%) of the region's young urban consumers are ready to replace their digital music devices with music-playing mobile phones.

Executive Director of Branded and organiser of the Music Matters conference, Jasper Donat, said that music on the move is driven by convenience.

"The 15-34 age group tend to be early adopters of technology, but this is beyond early adoption now. One gadget in your pocket is no longer a convergence fantasy. It's right here right now and take up is about to take off," he said.

The most enthusiastic respondents for converged devices were from emerging economies, perhaps reflecting a stronger desire for 'bang for their buck'. 75% of Malaysian, 66% of Thai and 65% of Chinese and Filipino respondents agreed they would replace their MP3 or iPod with a music-playing mobile phone.

Mr Harvey added that developing markets also showed the greatest enthusiasm for the music industry to work with telecommunications companies to deliver music via mobile.

"Demand for convergence is high everywhere, but especially prevalent in developing economies. This may be largely to do with technology infrastructure. These consumers may skip right over net-based digital music and move straight into mobile," he said.

An overall 63% of 15-34 year old Asians agreed that the music and telecommunications industries should be working together, with the figures rising to 79% of Indians, 76% of Filipinos, 74% of Indonesians and 68% of Thais.

Nature versus nurture - does culture or environment drive music habits?

The biggest mistake Asia's marketers can make is seeing the region as homogenous. MTV Networks Asia's VP Research & Planning, Ian Stewart, said that musical tastes, attitudes and preferences across Asia's youth vary from market to market and marketers need to change their approach accordingly.

"People's musical habits tend to reflect the overall cultural attributes of the place they are from, but are also greatly influenced by the physical environment," he said.

For example, the survey showed a phenomenal enjoyment of music on TV in both India and Indonesia. In both these countries the television is the device used the most often to listen to music - 44% nominate TV in India and 36% in Indonesia, far outstripping the Asia-wide average of 19%.

This penchant for music on TV was even more apparent when respondents reported the frequency of this behaviour - a mind-boggling two thirds of 15-34 year old Indians watch music videos almost every day, while 35% of Indonesians do this regularly.

To contrast, when asked if they watched music videos on the internet or mobiles, positive responses in both countries were comparatively negligible - 4% of India's youth watch on the internet and 5% watch on mobiles almost every day while Indonesia's figures are 1% for both.

"There's no doubt that these actions are heavily influenced by infrastructure. TVs are just about ubiquitous in the markets surveyed and music television has a high penetration, whereas internet access is not a given. However, the strong drive to see these music videos in the first place is due to passion for music, something that varies from culture to culture," he said.

Indian and Indonesian respondents showed the two greatest levels of passion for music across all ten markets.

About the Synovate Music Matters survey

The MTV, Branded and Synovate Music Matters survey asked over 3,800 urban respondents aged 15 to 34 in ten key markets about their music habits, activities and attitudes. It covered China, Korea, Hong Kong, Taiwan, India, Indonesia, Malaysia, Philippines, Singapore and Thailand and was conducted in March 2007 on AsiaBUS, Synovate's monthly omnibus survey.

* The survey covered the cities of Beijing, Shanghai, Guangzhou and Chengdu in China.

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