Chile, Colombia, & Argentina Music 360 2021: Sneak Preview

MRC DATA // AUGUST 2021
METHODOLOGY: CHILE, COLOMBIA & ARGENTINA MUSIC 360 2021

<table>
<thead>
<tr>
<th>STUDY TIMING</th>
<th>DATA COLLECTION</th>
<th>SAMPLE SIZE</th>
<th>QUOTA BALANCING</th>
<th>ADDITIONAL ANALYSIS</th>
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<tbody>
<tr>
<td>Music 360 data in all 3 countries was collected June 30, 2021, through July 28, 2021.</td>
<td>Online surveys using third-party panels were used to collect responses. The study was available in Spanish.</td>
<td>Interviews were conducted among online consumers (Ages 13+) as below: • 791 Chilean respondents • 835 Colombian respondents • 797 Argentine respondents</td>
<td>Data is representative of the respective online populations in Chile, Colombia and Argentina including age, gender, region, and income.</td>
<td>Please contact us if interested in learning about additional or custom analyses.</td>
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</tbody>
</table>
INSIGHT CATEGORIES

2021 MUSIC OVERVIEW & TRENDS
- Time spent with music
- Importance of entertainment interests
- Music listening locations/activities
- Music listening by format
- Share of music time by formats
- Music discovery sources
- Annual music spend

ROLE OF TECHNOLOGY
- Top factors for music device selection
- Device ownership
- Top devices for music listening
- Technology & music discovery

MUSIC STREAMING ENGAGEMENT
- Top music streaming service usage
- Free vs. paid subscriptions
- Paid subscription type
- Streaming service satisfaction
- Sources for song/artist identification
- Barriers for subscribing
- Commencement of paid subscriptions by life stage
- Future subscription opportunity
- Top streaming service features
- VPN usage for streaming services
- Drivers of VPN usage while streaming

GENRE & LANGUAGE
- Genre listenership and fandom
- Location and language preferences

FORMAT PURCHASING
- Past purchasing
- Purchase intent by format
- Format purchase considerations

PLAYLISTING
- Playlist importance
- Weekly playlist usage
- Post-playlist actions
- Music search topics
INSIGHT CATEGORIES (Cont.)

**LIVE STREAMED PERFORMANCES**
- Live streamed music event attendance
- Top platforms used
- Top attendance motivators
- Discovery & time of ticket purchasing
- Attitudes / Perceptions
- Paying for attendance
- Future interest in paid events
- Barriers for live streaming

**MUSIC COMPETITION SHOWS**
- Competition show viewership
- Impact of competition shows

**HEALTH & WELLNESS**
- Wellness activities/services
- Top wellness platforms
- Wellness goals

**SOCIAL MEDIA & VIDEO CLIP SITES**
- Social media & short video clip site usage
- Top music activities on sites
- Music/artist discovery on sites

**LIVE MUSIC EVENTS**
- Live event attendance *(past & future intent)*
- Discovery & time of ticket purchasing
- Awareness of top music festivals

**GENERATIONAL INSIGHTS**
- Insights for Gen Z and Millennials’ engagement with music across key topics, including how they compare to Gen Pop for behaviors, preferences, and attitudes

**BRAND ACTIVATIONS**
- Top brand activations
MUSIC IS POPULAR ACROSS LOCALES

MUSIC ENGAGEMENT
Among Online Consumers

CHILE
- Music Listenership: 40%
- Music Streamership: 87%
- Live Streamership: 90%

COLOMBIA
- Music Listenership: 40%
- Music Streamership: 87%
- Live Streamership: 91%

ARGENTINA
- Music Listenership: 40%
- Music Streamership: 87%
- Live Streamership: 92%
POP AND ROCK ARE THE TOP GENRES IN THE REGION

Among Music Listeners

**TOP GENRES**

**Chile**
-POP IN ENGLISH
-ROCK IN ENGLISH
-LATIN AM POP

**Colombia**
-VALLEN-ATO
-POP COLOMBIAN MUSIC
-DANCE

**Argentina**
-ARGENTINIAN ROCK
-ROCK IN ENGLISH
-ARGENTINIAN POP

POP AND ROCK ARE THE TOP GENRES IN THE REGION

LISTEN TO GENRE
ALL THINGS MUSIC ARE DISCOVERED ON SOCIAL MEDIA / SHORT VIDEO CLIP SITES

<table>
<thead>
<tr>
<th></th>
<th>CHILE</th>
<th>COLOMBIA</th>
<th>ARGENTINA</th>
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<tbody>
<tr>
<td>Discover music</td>
<td>53%</td>
<td>59%</td>
<td>52%</td>
</tr>
<tr>
<td>Discover live music events</td>
<td>53%</td>
<td>60%</td>
<td>54%</td>
</tr>
<tr>
<td>Discover live music streams</td>
<td>55%</td>
<td>53%</td>
<td>48%</td>
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Among Music Listeners, Live Event Attendees, and Live Streamers respectively

On social media/short video clip sites

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PHYSICAL HAS ITS PLACE...

FUTURE FORMAT PURCHASING

Among Music Listeners

CHILE +9%
COLOMBIA +4%
ARGENTINA +7%

Physical music purchase growth in the next 6 months vs past 12 months

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...BUT STREAMING WINS BIG

STREAMING BEHAVIORS
Currently stream music
Among Music Listeners

CHILE  COLOMBIA  ARGENTINA

96%  95%  95%

#1  #2  #3

Potential Premium streaming subscription growth (rank) in the next 6 months
Among Music Listeners not Currently Subscribed to a Premium Service
COLOMBIA & ARGENTINA FAVOR MUSIC COMPETITION SHOWS

MUSIC COMPETITION SHOW VIEWERSHIP
Among Online Consumers

<table>
<thead>
<tr>
<th>Country</th>
<th>% Viewership</th>
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<tbody>
<tr>
<td>Chile</td>
<td>58%</td>
</tr>
<tr>
<td>Colombia</td>
<td>75%</td>
</tr>
<tr>
<td>Argentina</td>
<td>70%</td>
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MRC Data Chile, Colombia, & Argentina Music 360 2021
Beyond the topline highlights offered here, the full Chile, Colombia, & Argentina Music 360 report explores:

- The music landscape in Chile, Colombia, & Argentina among online consumers
- Key insights around how this audience engages with music, including format preferences, discovery, occasions, time and money spent on music
- Online music streaming usage, including playlisting, subscriptions, and intent to subscribe
- The return of live music events and interaction with live streaming
- Genres and language preferences
- Role of technology in music listening
- Social media and short video clip usage for music content
- Top brand activations

To purchase the full report or commission an analysis to gain deeper insights into your specific business needs please [contact us](#).