

A young couple is the central focus of the image. The woman, in the foreground, has curly hair and is wearing large, reflective sunglasses. She has colorful paint splatters on her face and is smiling broadly, showing her teeth. She is making a peace sign with her right hand. The man is behind her, also smiling and wearing red sunglasses. He has paint on his face and is wearing a dark t-shirt. The background is a bright, sunny outdoor setting, likely a music festival, with other people visible in the distance. The overall mood is joyful and energetic.

**vevo**

**VEVO MUSIC FAN REPORT:**  
THE MILLENNIAL FAN TRIBES

## **FOREWORD BY ERIK HUGGERS, CEO**

Music creates transformative experiences. It has the power to connect people in personal and meaningful ways unlike any other medium. For music fans, it's an essential part of how they live their day-to-day lives. Finding the songs and melodies that speak to them directly and reflect their unique personas isn't so much a desire, but a need.

Different fans express their passion for music in vastly different ways. For this reason, we need to understand the unique personalities and behaviors that define the latest generation of music fans, both in the direct and indirect ways they interact, consume, love and share these experiences.

The Millennial influence is changing the landscape of music and pop culture. With always-on connectivity and social media, they have a limitless 24/7 reach. By instantly connecting with artists and global fan communities, they are crossing oceans and blurring borders. With digital platforms, they are discovering the-next-big-thing in unconventional ways, and helping lift these artists to the forefront of the music industry. Through a culture of discovery, engagement and sharing, along with a strong technology acumen, Millennials have demonstrated a voracious appetite for music consumption and interaction. This audience challenges the media industry to innovate and break away from the trends of the past. Brands are equally challenged when trying to activate within this influential and complex audience where attention spans are short, rush to judgment is fast and the right call to action can yield incredible results.

Within this report, we have identified four different tribes of music fans based on data from quantitative research, in person interviews, and in-depth behavioral analysis. We look at this report as a framework for how we understand the complexities and intricacies of Millennial behavior. It has been built with passion and respect for the music fan, a sentiment which continues to be at the core of everything we do at Vevo.

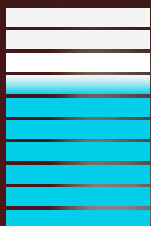




# MUSIC DRIVES AND CONNECTS MILLENNIALS

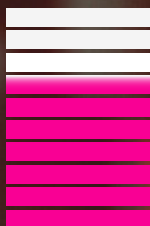
Millennials are the largest generation in history, and more diverse than any before them, but there is something that unites them all: **music is a huge passion point.**

The majority of young consumers agree that they cannot live without music, and that music is part of what defines them.



**65%**

want to  
feel music  
through my  
whole body



**69%**

say music is  
important  
to me

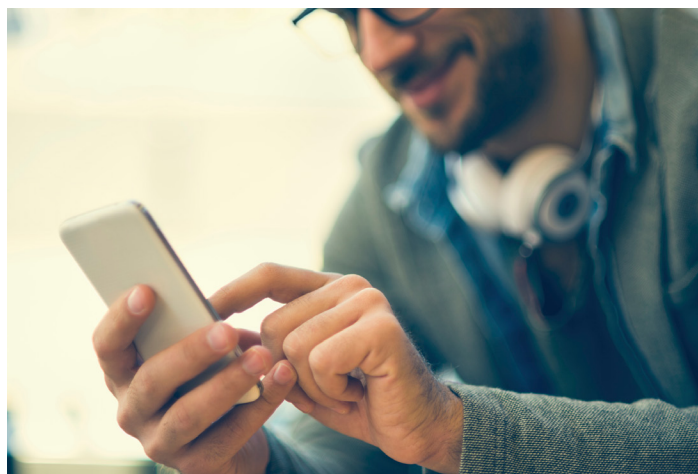


**71%**

say the  
music  
someone  
likes can  
tell you a  
lot about  
that person

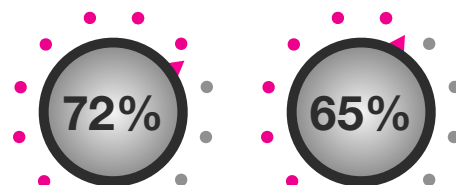
Vevo Music Fan Report  
n=2000





Music is also their connector. It connects them to emotions, to memories, and to each other. Millennial music fans build passionate communities around the music and artists they love. These fan armies devote time, energy, and creativity, building relationships with both artists and other fans that (thanks in large part to social media) far surpass the fan clubs of old.

Fan armies, both niche and mainstream, are completely devoted to their music fandoms and each other by extension. These groups spend massive amounts of time and energy online to discuss, activate, and create around their collective music passions, building a shared culture of content. Videos, remixes, fan art, and more are all broadcasted, shared, and re-shared by these passionate, visual-communication driven young consumers.



say music helps them connect with friends and family

of avid music fans belong to a fan army



There are over **10X** more conversations about music on social media than there are about TV

Source: Vevo Music Fan Report

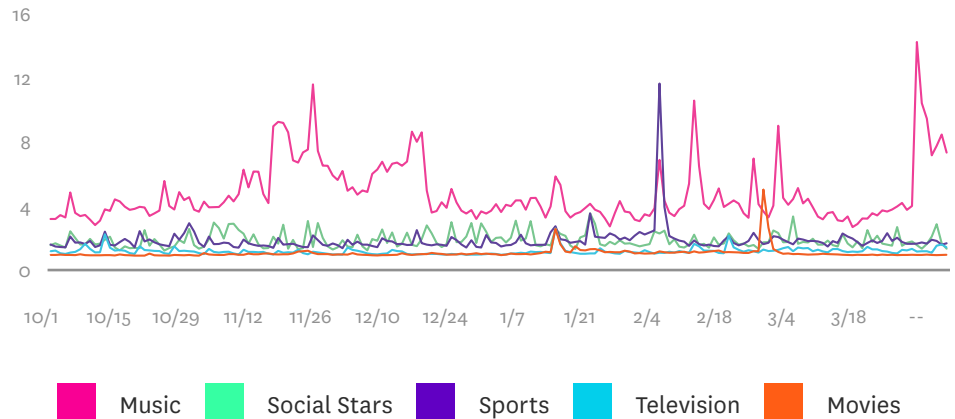
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Social media has made it possible for Millennials to connect with the musicians they love in completely new ways. Young consumers are given a personal window into artists' lives, creativity, and thoughts, and have unprecedented access to them. Of all of the different celebrities they know, Millennials by far have the deepest connections with music celebrities, who they see as more talented and admirable.

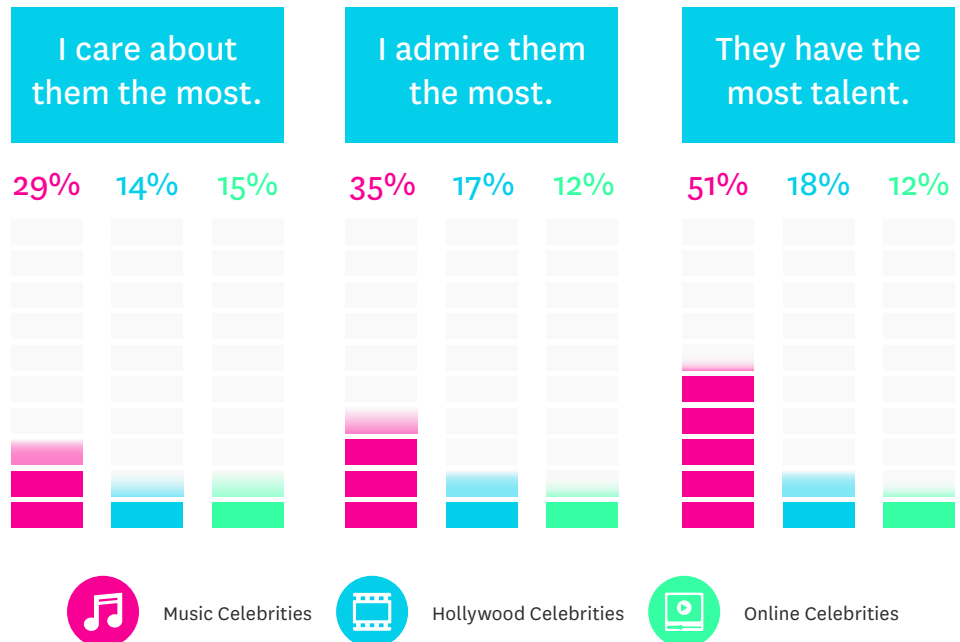
## MUSIC SEES THE HIGHEST VOLUME OF SOCIAL MENTIONS, COMPARED TO OTHER ENTERTAINMENT CATEGORIES

VOLUME OF MENTIONS IN MILLIONS



Source: Crimson Hexagon Social Category Analysis

## HOW DO MUSIC CELEBRITIES COMPARE TO OTHER TYPES?



Source: Ypulse Q2 2015 Trend Report n=1000

Not all music fans are the same, and different groups of Millennials have distinct ways of emotionally connecting to and consuming music. Vevo has identified **FOUR** music tribes within the Millennial generation.

## METHODOLOGY

### Quantitative Study

- Online survey fielded in Q1 2015
- 2,000 US respondents age 13-54
  - Data weighted to the U.S. Population
- Battery of questions configured to understand emotional and attitudinal nuances of music fandom, along with daily media consumption habits
- Created Personas on the Super Fan to understand how this segment of fans engage emotionally with music. Personas are built on psychological concepts with narrative reporting and visualization as key components to bring them to life. Given our research objective we used a factor analysis of the attitudinal battery as the primary data source with which to build a psychological profile. We first develop a construct of who

these super music fans are and how they use music; we then layer consumption data and qualitative data to create a fully fleshed out persona.

- Method: Q-Factor cluster analysis, combining 2 attitude arrays. Q-Factor creates variables for each factor using a regression technique. Each respondent receives a factor loading (similar to a correlation coefficient) for each factor. A respondent is placed into the factor where he has the highest loading.

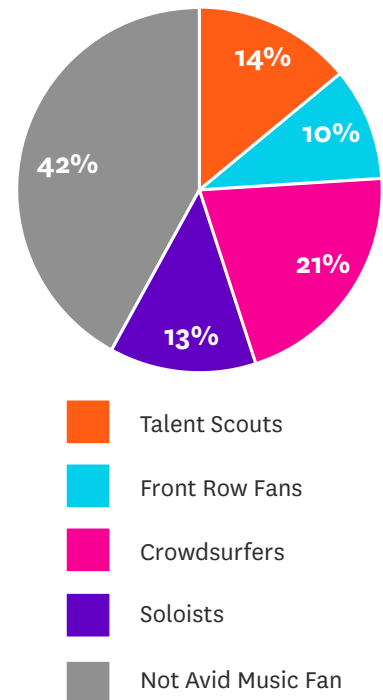
### Qualitative In-Depth Interviews

- Personal interviews, Q1 2015 and Q3 2015
- 15 participants age 13-34 and Avid Music Fans
- 45 minute interviews, combining discussion and task-based activities

### Pieces of the Millennial

#### Avid Music Fan Pie

Within Total Millennial  
(13-34) Population



### MILLENNIAL U.S.

#### AUDIENCE SIZE

**Total Avid Music Fans 55M**

Talent Scouts 13M

Front Row Fans 10M

Crowdsurfers 20M

Soloists 12M



# TALENT SCOUTS

**“Be the voice—not the echo.”**

Tastemakers. Males. 25 to 34. Affluent.

**BRANDS CAN REACH  
THIS TRIBE THROUGH THE  
LATEST TECH AND MUSIC  
DISCOVERY TOOLS**



Talent Scouts see music as social currency: they’re all about hearing the latest hot tracks first, impressing friends with the newest in music tech, and setting the mood at social events with the perfect playlist. This group is most likely to use music to get pumped up, whether during a party, exercising, or at live shows and events scouting for new up-and-coming artists.

**These are music influencers who want to spread the word on the newest talent and brands to know. They’re willing to pay more for quality tech and music experiences, and are always on the hunt for new music content via radio apps, music sites and blogs, and discovery/identification apps.**

**“I remember when the Beyoncé album came out, like surprise, and she released the whole album with a video for every song. I watched every video, because I had to, you know?”**

**ACTIVE IN THE MUSIC SCENE,  
ONLINE AND OFFLINE**

**DEMAND AND SEEK  
OUT QUALITY SOUND  
AND PRODUCTION**

**LOOK TO THEM AS  
MUSIC TASTEMAKERS TO  
SPREAD THE WORD**

## DEFINING GENRES:

- Dance
- Pop
- Electronic
- Alternative
- R&B

# FRONT ROW FANS

“You are what you listen to.”

Music defines them. Females. 18 to 24. Students. Suburban.

BRANDS CAN REACH  
THIS TRIBE THROUGH  
EXPERIENCES THEY CAN  
SHARE AND CONNECT ON



For Front Row Fans, music is that intangible thread that ties them to friends, family, social events, and more. A day without music is incomplete, and they crave the connection. Music for them is an emotional experience, not about impressing anyone, but instead personal, used to express themselves, influence their mood, and connect with others. Front Row Fans are most likely to use music to relax and forget their worries—like school and family obligations—to instead enjoy life and just have fun.

**Their strong passion makes them cultural influencers.**

**They’re motivated to share the music, movies, shows, restaurants, decorating, fashion, and beauty that they love, using social media and word-of-mouth.**

“On the computer I’ll go more towards the video than the song. I learn more about the artist, because they’ll show their story, and that’s another way that you can relate more.”

## CULTURAL INFLUENCERS

THEIR FRIENDS WILL  
RALLY AROUND THEIR  
PASSION POINTS

### DEFINING GENRES:

- Rock
- Country
- Pop
- Alternative



# CROWDSURFERS

**“Entertain me.”**

Looking for the buzz. 25 to 34. Parents. Cities.



Crowdsurfers are an active group that use music to enhance life’s moments, both big and small. They’re looking for songs to get them through their day—and to turn the everyday into something more. These young parents and go-getters are most likely to use music to celebrate, after a long day at work with their families, cooking dinner with friends, or toasting a personal achievement.

Though busy, Crowdsurfers still want to stay in the loop on the latest music news and buzz. This tribe misses the days of top ten TV countdowns and music videos on repeat, and they’re looking for guidance and influence to keep up-to-date on entertainment, using all of the apps and services available to them to find what is popular.

**Crowdsurfers are constant-consumers of entertainment content. They have music videos on throughout the day to keep them company, and they’re the most interested in entertainment buzz. They’re using social media to share music, read tweets, like artist posts, and watch video premieres.**

**“I don’t think there’s a week I could go by without watching videos. It’s just so accessible. I’m from that era of TRL and 106 and Park and MTV Tunes.”**

**BRANDS CAN REACH THIS  
TRIBE THROUGH TOOLS AND  
CONTENT THAT MAKE THEM  
FEEL IN-THE-KNOW**



**LOOKING FOR  
RECOMMENDATIONS ON  
WHAT TO LISTEN TO AND  
WATCH NEXT**

**ENTERTAINMENT LOVERS,  
TUNED INTO POP CULTURE,  
TV, MOVIES, AND MUSIC**

## DEFINING GENRES:

- Latin
- Hip-Hop/Rap
- Indie Pop
- Dance

# SOLOISTS

**“Tune in to tune out.”**

Lost in the music. 18 to 24. Single. Independent.

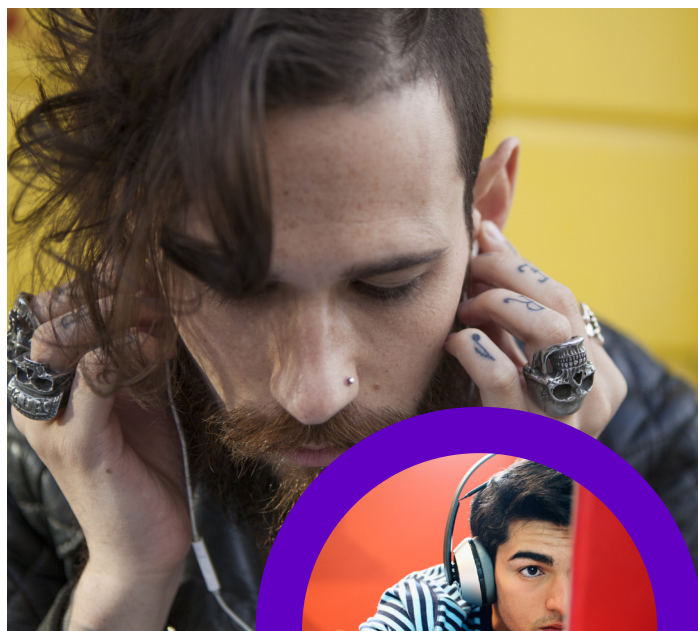


Soloists feel a personal connection to the music they love. They are living in an in-between moment, figuring out what lies next for them, stuck in between student life and adulthood. They’re most likely to use music to relax, escape the real world and other thoughts. For Soloists music is more of a solitary experience than a shared one. They’re intellectual listeners, diving into lyrics and analyzing meaning. This tribe values their freedom and independence, and are confident in their personal music taste. They aren’t as likely to say they like just any artist—but once they’re hooked as a fan they are fully invested, and their love of the music is tied to their love of the artist.

**Soloists will spend on concerts for the full music experience, and merchandise to bring home a piece of the event and musicians. Because they want to know more about artists as people, they seek out non-mainstream channels for alternative access and behind-the-scenes information.**

**“Beyoncé & Drake did a music video for the song “Mine”. That’s a good one because you have to think about it. A lot of videos are just the artists wearing fancy clothes and stuff. This one’s more artistic.”**

**BRANDS CAN REACH THIS  
TRIBE THROUGH INCREASED  
ACCESS TO THE ARTISTS  
THEY’RE INVESTED IN**



**FOCUSED, INDEPENDENT,  
CONFIDENT FANS**

**CRAVE BEHIND-THE-SCENES  
FOOTAGE, LIMITED EDITION  
MERCHANDISE**

It’s not about genres for this tribe. They care more about the artist and the emotion of the music.

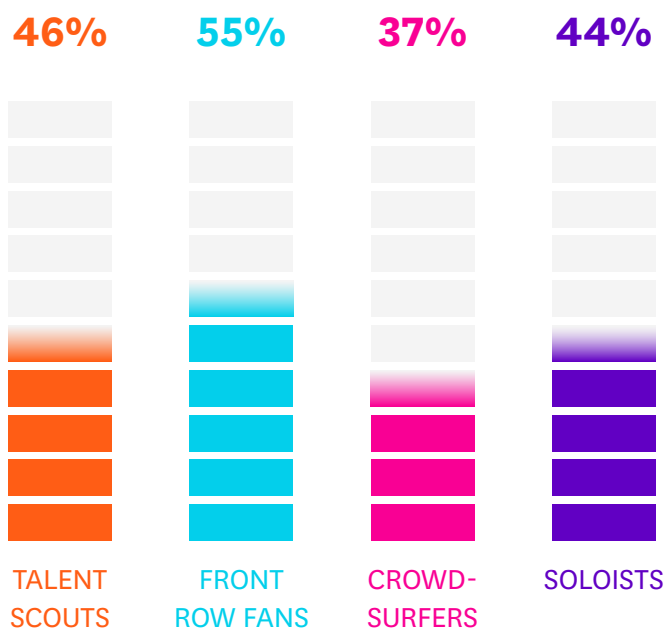


# A TRIBAL BREAKDOWN

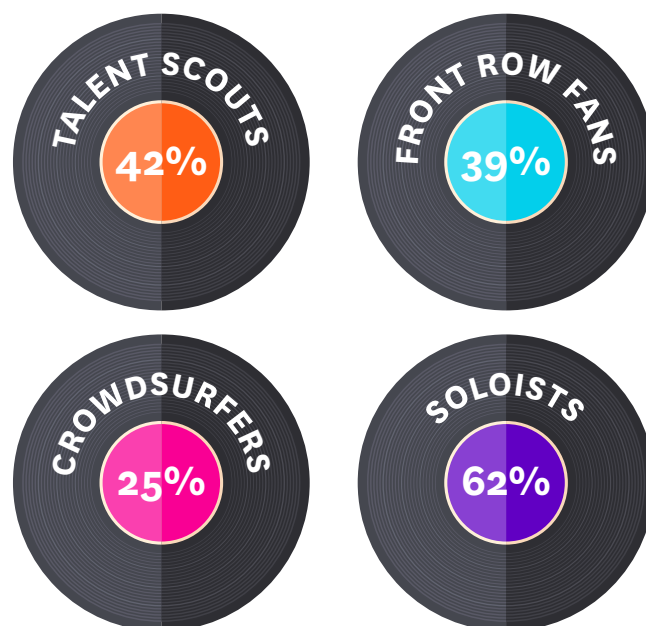
Front Row Fans are the tribe most likely to rate their passion about music at the highest level.

Focused, loyal fans the Soloists are more likely than other tribes to have only one or two favorite genres.

HIGHEST MUSIC FAN PASSION

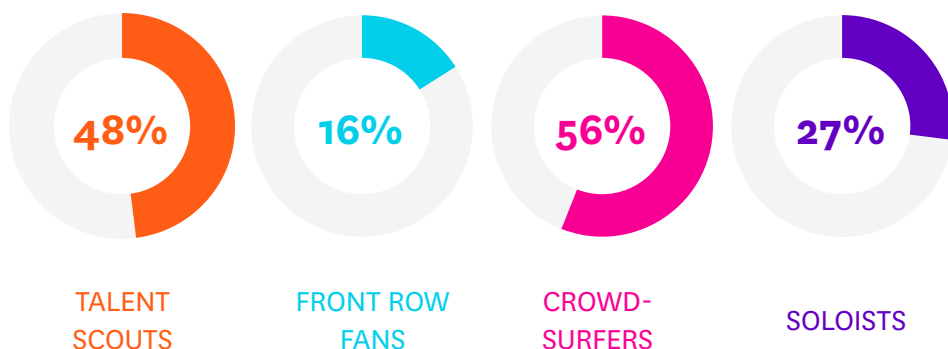


HAS ONLY 1-2 FAVORITE GENRES

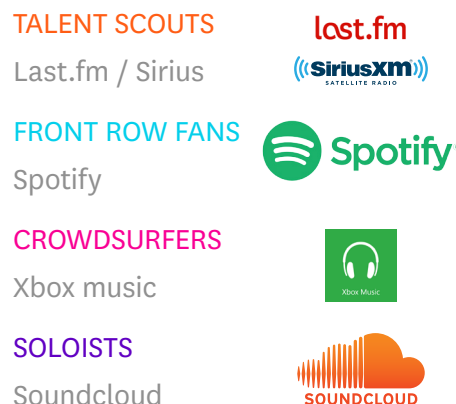


All tribes use a variety of services to consume music, with Vevo and Pandora as the highest used services. Crowdsurfers, eager to find out the newest hits, are most likely to pay for a music subscription.

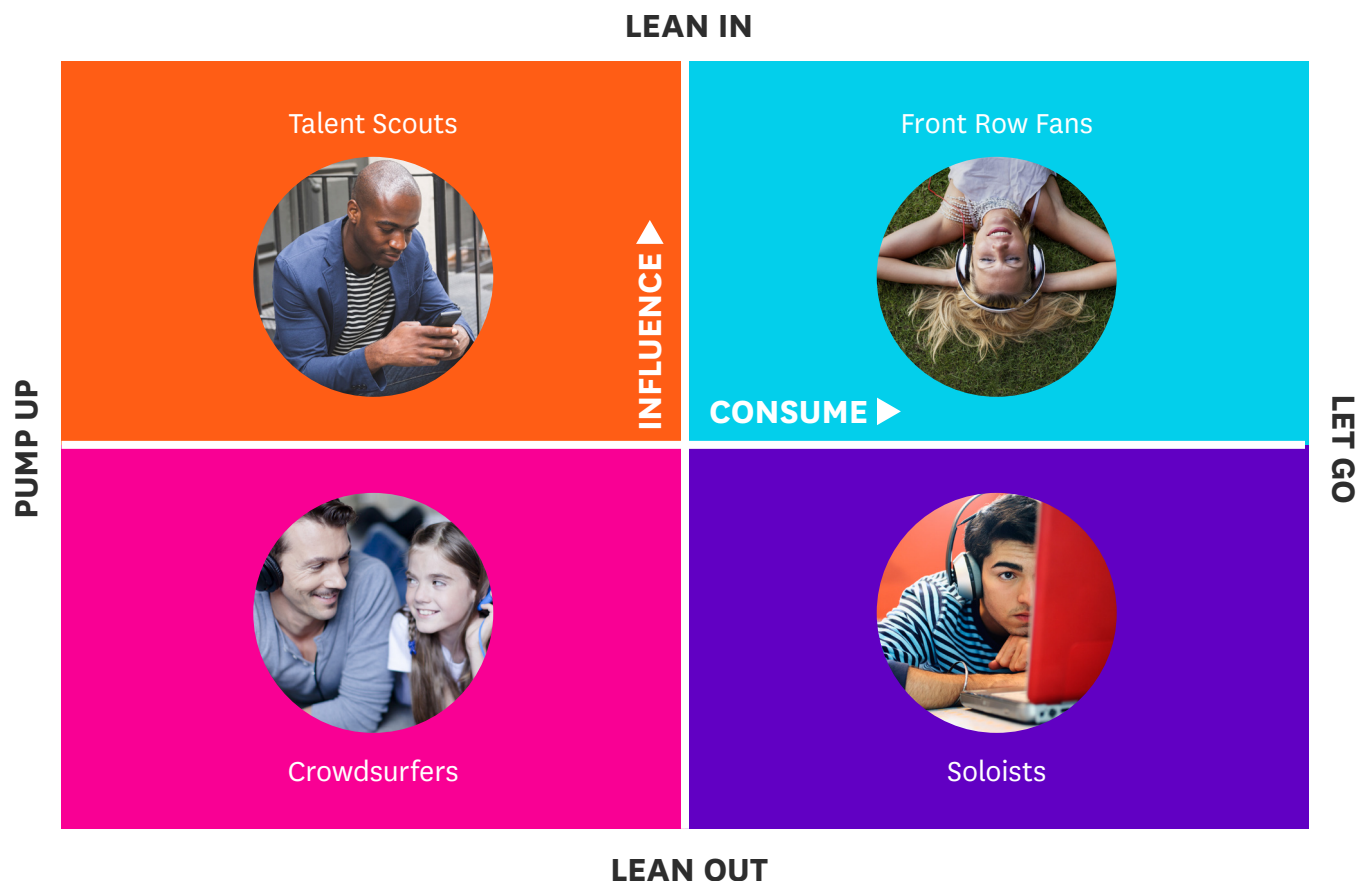
CURRENTLY PAY FOR A MUSIC SERVICE SUBSCRIPTION



SERVICE THEY'RE MORE LIKELY TO USE COMPARED TO OTHER TRIBES



**THEIR INFLUENCE AND CONSUMPTION PATTERNS SPEAK TO THEIR PERSONALITIES, SOCIAL BEHAVIORS, AND APP USAGE**



**INFLUENCE**

**LEAN IN**

Create their own unique music world by seeking out new content and sharing personalized experiences

**LEAN OUT**

Expect music to find them by plugging in to curated platforms and being open to influencer opinions

**CONSUME**

**PUMP UP**

Use music in a more functional way to get energized and set the social atmosphere

**LET GO**

Connect more internally with music, whether as an escape, emotional driver, or intellectual interest



# WHICH MILLENNIAL FAN TRIBE ARE YOU?



## Q1. You listen to music to...

- A. Get pumped up
- B. Forget worries and have fun
- C. Celebrate happy moments
- D. Relax and tune out

## Q2. What do you value most?

- A. Originality
- B. Passion
- C. Family
- D. Independence

## Q3. Choose a quote that sounds like you:

- A. "Be the voice—not the echo"
- B. "You are what you listen to"
- C. "Entertain me"
- D. "Tune in to tune out"

## Q4. How do you find out about music?

- A. Reading new music blogs
- B. Friends' posts on social media
- C. Playlists on apps and the radio
- D. Subscribing to artist pages online

## Q5. Your social media history would reveal...

- A. Searching for show dates and posting song links
- B. Curating my profile and uploading concert selfies
- C. Watching music videos and scrolling for entertainment buzz
- D. Not too much, I look around more than I post

### Drum roll please...

Mostly A

**You're a Talent Scout!**

Mostly B

**You're a Front Row Fan!**

Mostly C

**You're a Crowdsurfer!**

Mostly D

**You're a Soloist!**

### Tied between two tribes?

[Click here](#) to take the tie-breaker survey!