Contemporary Music **Super**Study **4**

Executive Summary

April 2022

COLEMAN INSIGHTS

MEDIA RESEARCH
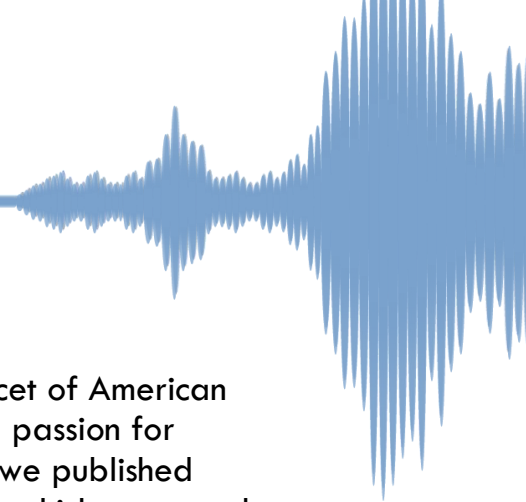
STILL WAITING FOR THE REBOUND

The COVID-19 pandemic has impacted virtually every facet of American and Canadian society, including consumers' interest in and passion for contemporary music. We revealed this very clearly when we published *Contemporary Music SuperStudy 3* a year ago. That study, which measured how consumers were responding to 2020's most-consumed songs, demonstrated how there was little change in the songs consumers like the most relative to the previous year. This was not terribly surprising to us at Coleman Insights, as it mirrored findings in the customized, proprietary research we had conducted for many of our individual audio entertainment clients. At the height of the pandemic's impact, live music performances had nearly disappeared, and new music releases slowed to a trickle.

As we prepared for *Contemporary Music SuperStudy 4* and its measurement of 2021's most-consumed songs, we expected that as society significantly reopened over the past year, this would be reflected in consumers' evaluations of contemporary music. This report—while including other findings included in its appendix—will focus on the major finding that we have yet to detect any rebound in consumers' enthusiasm for contemporary music. Repeating the analogy we used when presenting the previous study's results, it still feels like the movie *Groundhog Day* when it comes to contemporary music, as time feels like it is standing still.

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The most glaring example of how things have not changed is that Ed Sheeran's 2017 hit "Shape Of You" finished as the number one song in *Contemporary Music SuperStudy 4*. This is striking not only because the best-testing song is five years old, but because this marks the third consecutive year in which "Shape Of You" finished in first place in our study.

That no song released since 2017 has managed to wrestle the top spot from "Shape Of You" is an admittedly shallow signal indicator of how consumers are embracing contemporary music. Additional findings we will cover in the next two sections, however, solidify our thinking about how contemporary music appetites have not rebounded yet.

ONE 2021 RELEASE CRACKS THE TOP TEN

When we go beyond the best-testing title and examine the top ten songs in *Contemporary Music SuperStudy 4*, another striking finding emerges: only one song released in 2021 makes the cut. That honor goes to Adele's "Easy On Me," which ranked eighth in this year's study. (In fact, "Easy On Me" is the only song released in the last <u>two</u> years to finish among the top ten; the other nine songs in the top ten were *pre-pandemic* releases.)

The other nine songs in the top ten were strong performers in *Contemporary SuperStudy 3*, each finishing among the twelve most popular songs with consumers a year ago.
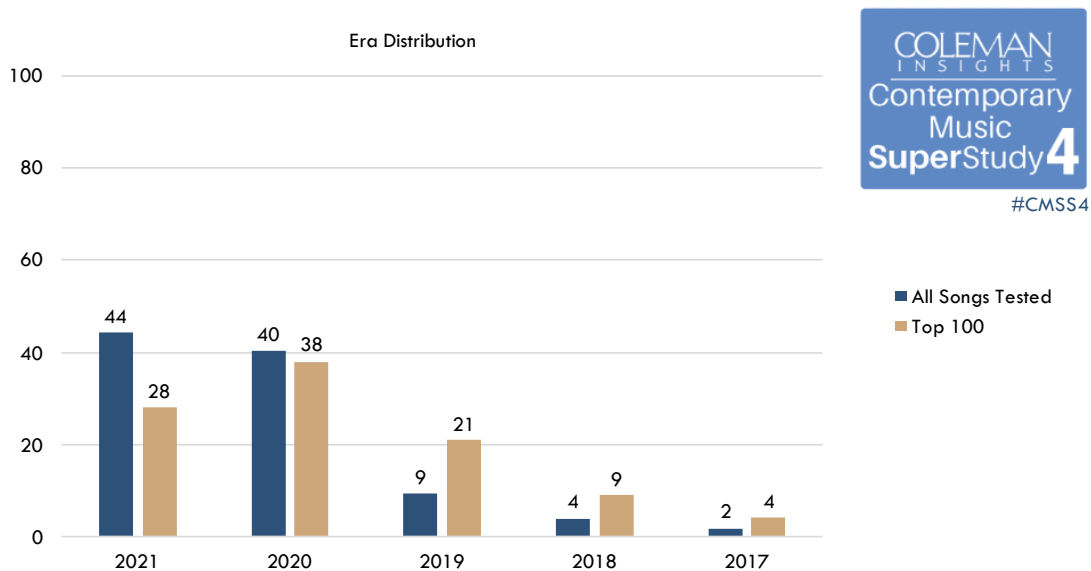
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Contemporary Music SuperStudy 4		1 year ago Contemporary Music SuperStudy 3
1	Shape Of You – Ed Sheeran	1
2	Believer – Imagine Dragons	2
3	Blinding Lights – The Weeknd	3
4	Someone You Loved – Lewis Capaldi	5
5	Memories – Maroon 5	11
6	Better Now – Post Malone	8
7	Girls Like You – Maroon 5 feat. Cardi B	7
8	Easy On Me – Adele	n/a
9	High Hopes – Panic! At The Disco	12
10	Perfect – Ed Sheeran	10

That none of these older songs were supplanted in the top ten is striking when we consider that we tested many new songs in *Contemporary Music SuperStudy 4,* because many 2021 releases were among the most consumed songs of the year. In fact, 123 titles from 2021 made it into the study, but "Easy On Me" was the only one to crack the top ten. Just missing that distinction was "Stay" by The Kid LAROI X Justin Bieber, which finished in eleventh place, while Masked Wolf's "Astronaut In The Ocean"[1] was the only other 2021 release that finished among the top 30 songs.

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[1] "Astronaut In The Ocean" was initially released in 2019 but was re-released on a much broader scale in January 2021 and is therefore classified as a 2021 title in this study.
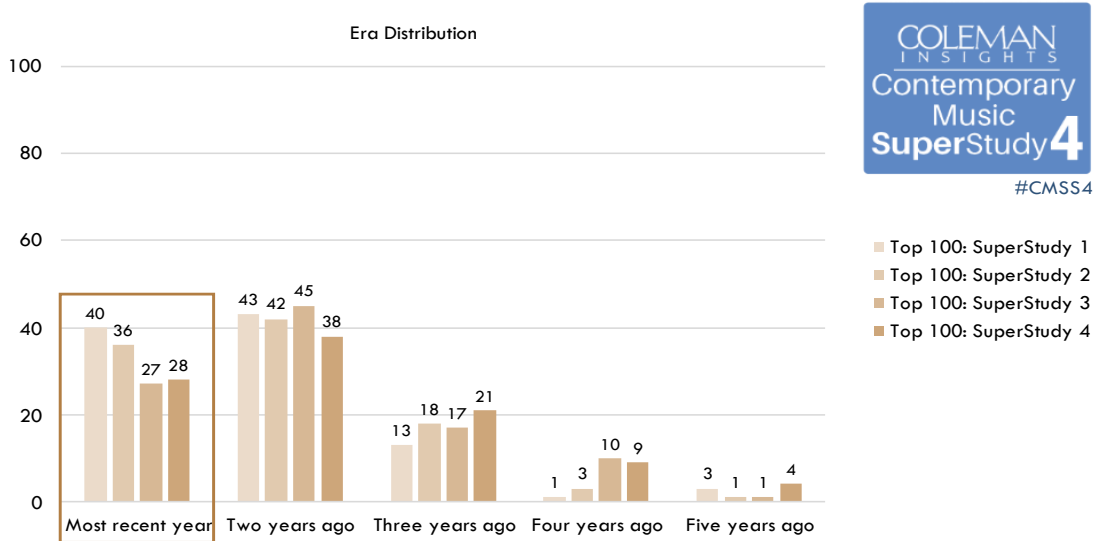
THE BEST-TESTING TITLES ARE OLDER ONCE AGAIN

The most definitive signs of consumers' diminished appetite for contemporary music are found in the Era Distribution of the most popular songs in *Contemporary Music SuperStudy 4*. In simplest terms, the older songs tested perform better than more recent releases. Despite making up 84% of the most-consumed songs in 2021, titles released in 2021 and 2020 comprise a smaller percentage—66%—of the Top 100 songs in terms of consumer evaluations in our study, while the 34% presence of songs from 2019, 2018, and 2017 in the Top 100 dwarfs the 15% presence of titles from these years among All Songs Tested.

Era Distribution

Legend: ■ All Songs Tested ■ Top 100

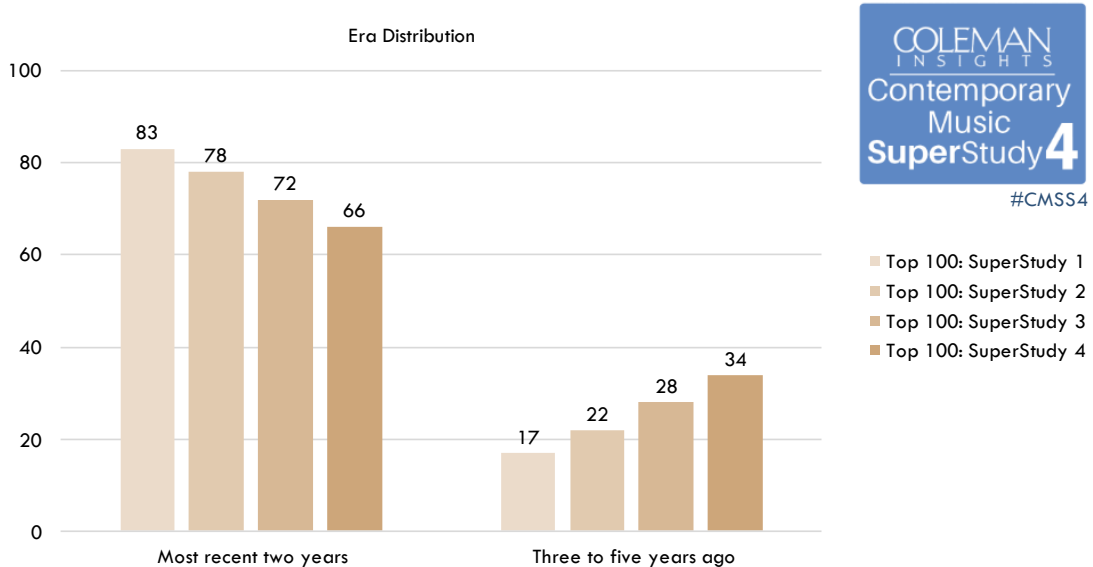| Year	All Songs Tested	Top 100
2021	44	28
2020	40	38
2019	9	21
2018	4	9
2017	2	4

This is not a terribly surprising pattern overall and mirrors what we often observe at Coleman Insights. The older songs that are still being consumed highly enough to qualify for this study have, inherently, exhibited staying power. Conversely, some newer songs may still be developing in familiarity and finding their fan base.

What is surprising, however, is that the degree to which newer songs "underperform"—which shifted notably in last year's study—has continued. Songs from the most recent year have underperformed in all three of the previous editions of our *Contemporary Music SuperStudy*, but the magnitude of this underperformance accelerated with the pandemic. In last year's study, the presence of songs from the most recent year among the Top 100 titles slid from 36% to 27%; the 28% presence of 2021 songs among the

Top 100 in *Contemporary Music SuperStudy 4* demonstrates the lack of a rebound for the newest material.

Era Distribution

	Most recent year	Two years ago	Three years ago	Four years ago	Five years ago
Top 100: SuperStudy 1	40	43	13	1	3
Top 100: SuperStudy 2	36	42	18	3	1
Top 100: SuperStudy 3	27	45	17	10	1
Top 100: SuperStudy 4	28	38	21	9	4

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From a broader perspective, this reflects a clear trend in how the Top 100 songs are getting older. When we divide the titles tested in each of the four editions of the *Contemporary Music SuperStudy* between songs released in the two most recent years and songs released between three and five years ago, we see how the presence of the latter among the Top 100 titles has grown every year.

Era Distribution

	Most recent two years	Three to five years ago
Top 100: SuperStudy 1	83	17
Top 100: SuperStudy 2	78	22
Top 100: SuperStudy 3	72	28
Top 100: SuperStudy 4	66	34

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OVERVIEW & METHODOLOGY

Since its inception in 2019, Coleman Insights' *Contemporary Music SuperStudy* has emerged as the audio entertainment industry's benchmark study on the state of contemporary music tastes in the United States and Canada. Its intent is to assess the degree to which consumers embrace new releases versus other contemporary songs each year, how the texture of the most popular contemporary music changes from year to year, and how these findings vary across different segments of the population. Now in its fourth year, the *Contemporary Music SuperStudy* has relied on a consistent methodology to track real changes in consumer tastes.

Readers should note that the use of the word "Contemporary"—versus "New"—in the study's title is intentional. This is not exclusively a study of new music; it is a study of contemporary music, and that distinction is important.

As with its predecessors, *Contemporary Music SuperStudy 4* is the result of a massive online music test conducted on the same FACT360℠ Strategic Music Test platform Coleman Insights uses to help hundreds of radio stations configure and optimize their music libraries. We surveyed 1,000 consumers between the ages of 12 and 54 across the United States and Canada, employing quotas to ensure that the sample appropriately represents the population in terms of age, gender, ethnicity, and geography.

To build the list of titles to be tested, we once again worked with Luminate (formerly MRC Data), whose data allowed us to compile a list of 2021's most consumed songs based on streaming, radio airplay, and sales. (That list revealed interesting nuggets, including that "Levitating" by Dua Lipa featuring DaBaby was the number one song last year in terms of streaming and radio airplay, while "Butter" by BTS was 2021's leader in terms of sales.) We then supplemented that list by adding the most consumed songs across six genres—Pop, Country, Alternative/Rock, Hip Hop/R&B, Electronic/Dance and Latin—to make sure we had an appropriate representation of each in our study.

Finally, we removed songs that were more than five years old. For example, among 2021's most consumed songs that fit that description were Journey's "Don't Stop Believing" and Mariah Carey's "All I Want For Christmas," two songs with amazing staying power that we had to exclude from our last two studies as well. Another example of an older song we had to exclude this

year was The Neighborhood's "Sweater Weather," a 2012 song that has experienced a resurgence in popularity, driven by TikTok and the song's emergence as an anthem of the bisexual community. Since this is the *Contemporary Music SuperStudy*, we did not include these titles in our test list.

We tested music hooks (provided by Hooks Unlimited) for each of the 277 titles selected through this process with all 1,000 of our study respondents. As is Coleman Insights' standard practice with our FACT360 platform, we randomized the hooks so that each respondent evaluated them in a different order from one another. When respondents in our study were played the hook from each, they were asked to rate it on a five-point scale ranging from Like A Lot to Dislike A Lot or to tell us if they were Unfamiliar with it. Using this approach, we calculated Evaluation Average scores that are based on the full range of responses to each song. These scores provide insights into how mass appeal a title is because it considers not only those respondents who are passionate supporters, but also those who react negatively or are unfamiliar with the song.

APPENDIX: OTHER NOTEWORTHY FINDINGS

While the most significant findings of *Contemporary Music SuperStudy 4* pertain to the lack of a rebound in consumers' appetites for contemporary music, Coleman Insights reached numerous other findings. We summarize those in this section.

POP REIGNS SUPREME

In a consistent finding with previous editions of the *Contemporary Music SuperStudy*, Pop music performs very well in this year's study. Pop titles are substantially overrepresented among the Top 100 songs, making up 44% of them as compared to the 24% presence of Pop titles in the overall list of titles tested.
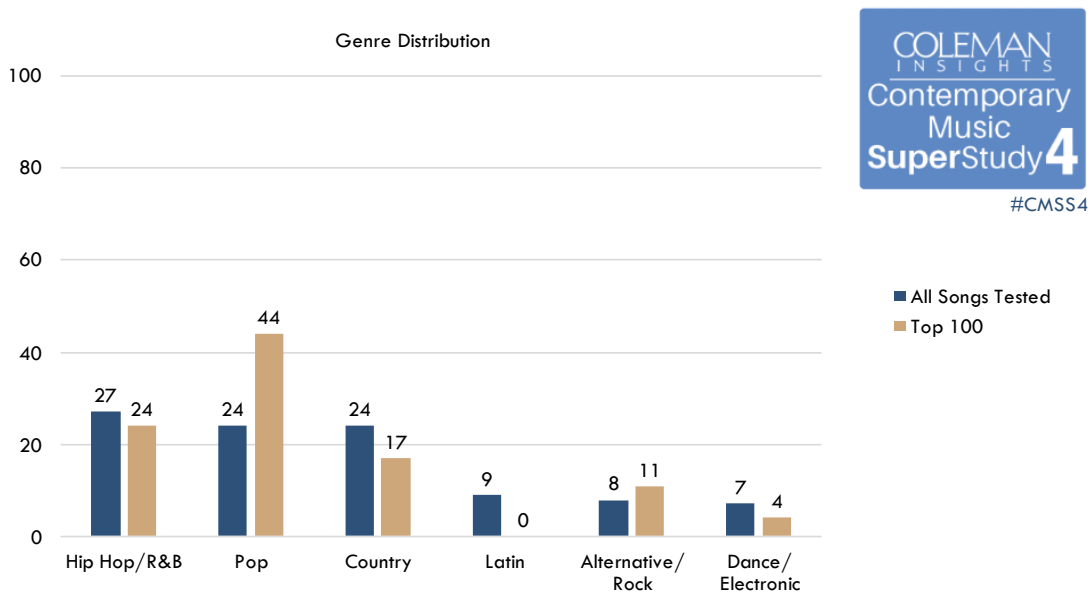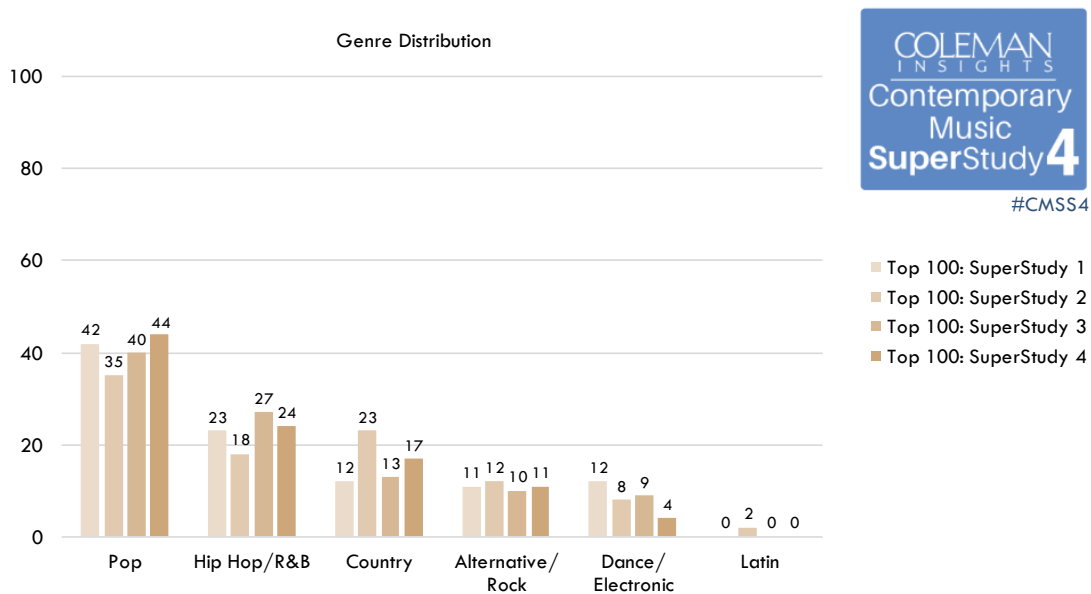

Hip Hop/R&B and Country titles are underrepresented among the Top 100, but—at 24% and 17%, respectively—make up the second and third largest portions of the 100 best-testing songs. At 11%, Alternative/Rock titles make up the only other double-digit proportion of the Top 100, and this sound is somewhat overrepresented versus the 8% presence of such titles among All Songs Tested.

Pop's dominance continues a trend from previous studies, but its 44% presence among the Top 100 is the highest it has been to date. Hip Hop/R&B supplanted Country as the second largest portion of the Top 100 in last year's study and has maintained that lead in this year's results. The only other notable trend in the texture of the Top 100 songs is the decline of Dance/Electronic titles, which made up 12% of the Top 100 in the first *Contemporary Music SuperStudy,* but only 4% in this one.

Genre Distribution

	Pop	Hip Hop/R&B	Country	Alternative/Rock	Dance/Electronic	Latin
Top 100: SuperStudy 1	42	23	12	11	12	0
Top 100: SuperStudy 2	35	18	23	12	8	2
Top 100: SuperStudy 3	40	27	13	10	9	0
Top 100: SuperStudy 4	44	24	17	11	4	0

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HIP HOP/R&B LEANS YOUNG, COUNTRY LEANS OLDER

When we break down our results by age group, we find that the presence of Pop titles in the Top 100 is relatively consistent across the 12-24, 25-34, 35-44, and 45-54 cells. The presence of Pop is lowest at 39% of the Top 100 songs among 12- to 24-year-olds and peaks at 45% among 35- to 44-year-old consumers. Alternative/Rock and Dance/Electronic follow similar patterns, with roughly the same proportions of the Top 100 with each age group.


Genre Distribution
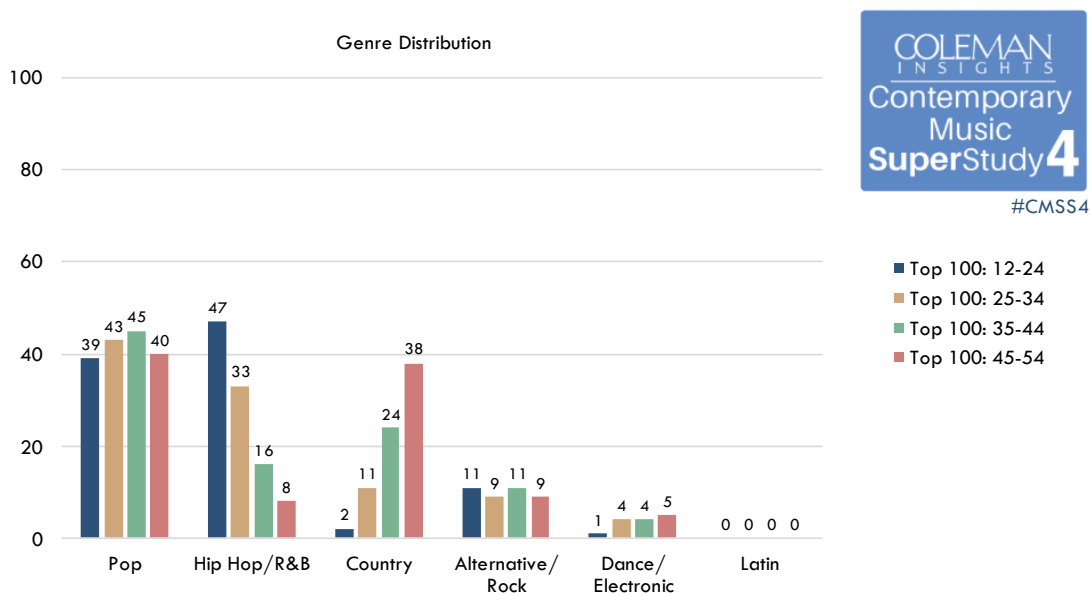
The opposite is true for Hip Hop/R&B and Country titles, as both sounds exhibit strong skews in their age appeal. At 47%, Hip Hop/R&B titles make up the largest proportion of the Top 100 with 12- to 24-year-olds, and these titles are also heavily present among the 100 best-testing songs with consumers between the ages of 25 and 34. In the 35-44 and 45-54 age cells, far fewer titles from the Hip Hop/R&B genre make it into the Top 100.

Conversely, Country titles perform much better with older consumers than with younger consumers. Among 45- to 54-year-olds, Country's 38% presence is competitive with Pop at 40% for the leading proportion of titles in the Top 100. Country also finishes in second place in the 35-44 age cell, making up 24% of the Top 100 songs with consumers in this age group. Both performances are considerably stronger than how Country fares among the Top 100 songs with 12- to 24-year-olds and 25- to 34-year-olds.

COUNTRY MUCH STRONGER WITH WOMEN THAN WITH MEN

At 22%, Country ties with Hip Hop/R&B as the second most prevalent sound in the Top 100 songs among female consumers. This is well behind the 43% presence of Pop titles in the Female Top 100, which is the exact same percentage of Pop songs in the 100 best-testing songs with men.
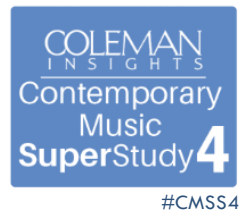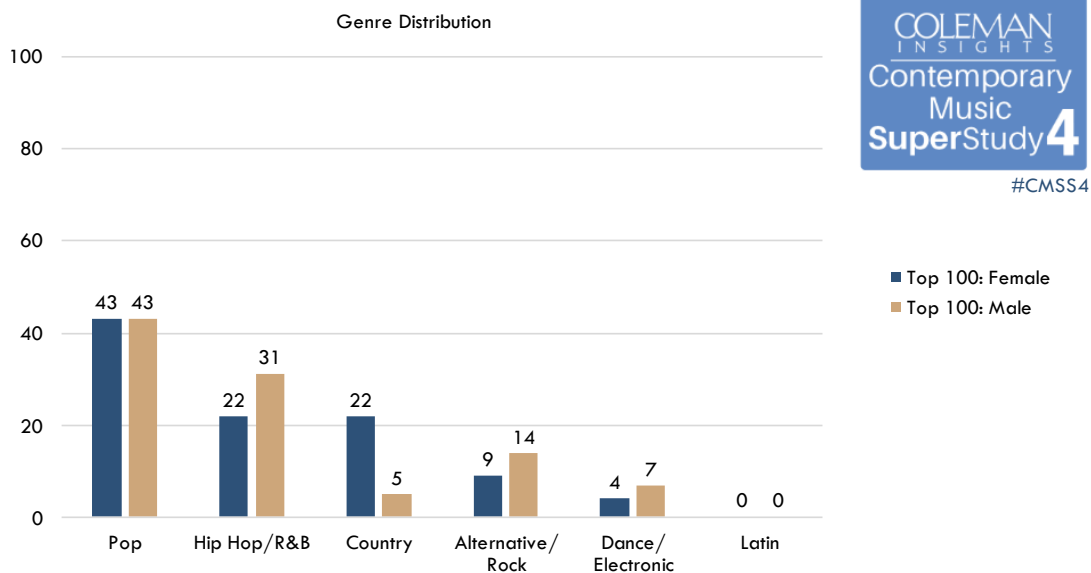

The picture is significantly different when we focus on the Top 100 songs with male consumers. Country is nearly absent among the 100 songs that test best with men, with a 5% presence that is less than every other genre except Latin. Instead, beyond Pop, male consumers are more likely to put Hip Hop/R&B, Alternative/Rock, and Dance/Electronic titles in their Top 100 than female consumers do.

VERY DIFFERENT TOP 100S BETWEEN CONSUMERS OF DIFFERENT ETHNICITIES

The songs consumers rate highest in *Contemporary Music SuperStudy 4* vary most significantly by how consumers identify their ethnicity. This form of segmentation is the only major one that shows that Pop does not dominate universally.

Among Black consumers, Hip Hop/R&B titles dominate, making up 67% of their 100 best-testing songs, a considerably greater proportion than Pop's 26% presence. Very few titles from other genres finish among the Top 100 songs with Black consumers.
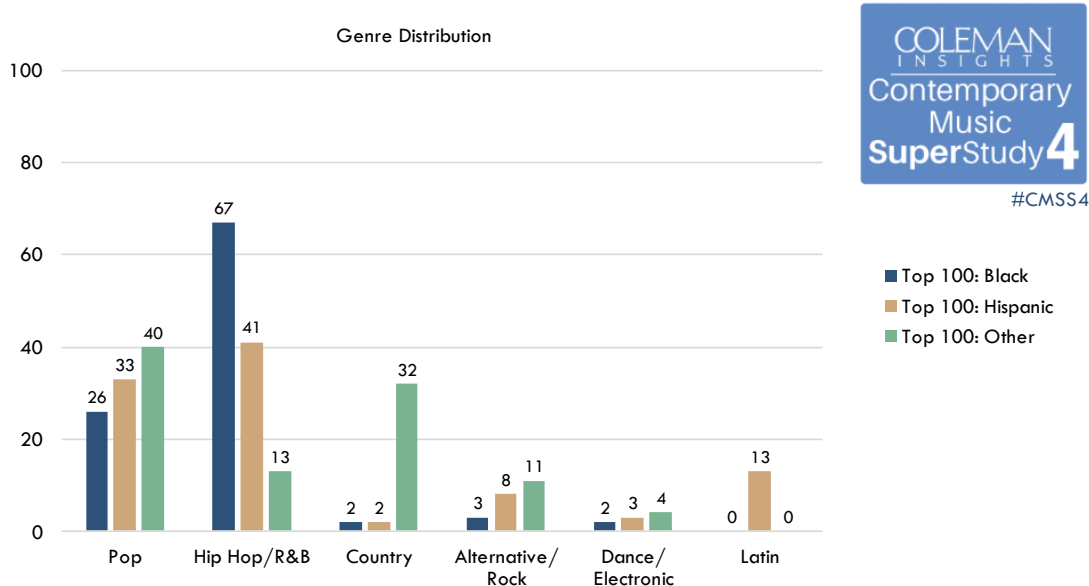

Hip Hop/R&B titles also perform well with Hispanic consumers, but do not dominate Pop titles to the extent that they do among Black consumers. Forty-one percent (41%) of the 100 best-testing songs among Hispanics are Hip Hop/R&B titles, while Pop titles make up 33% of their Top 100. It is only among Hispanics that Latin titles finish among the Top 100, at 13%.

Consumers who do not identify as Black or Hispanic place large numbers of Pop (40%) and Country (32%) titles among their Top 100 songs. Hip Hop/R&B and Alternative/Rock, at 13% and 11% respectively, make up far smaller proportions of the 100 best-testing songs among these consumers.

SEGMENTATION BY GEOGRAPHY AND POLITICAL ORIENTATION YIELD SIMILAR FINDINGS

There are strong correlations between the songs consumers like the most and whether they live in urban, suburban, or rural areas. Similar correlations exist between the Top 100 songs among listeners of different political orientations and these patterns align well those based on geography.

At 43%, Pop makes up the biggest portion of the Top 100 songs with Urban consumers, but—at 42%—Hip Hop/R&B titles are nearly as prevalent. No other genre—including Country, which makes up only 4% of the Urban Top 100—makes up a double-digit proportion of the 100 best-testing songs with consumers who live in urban areas.
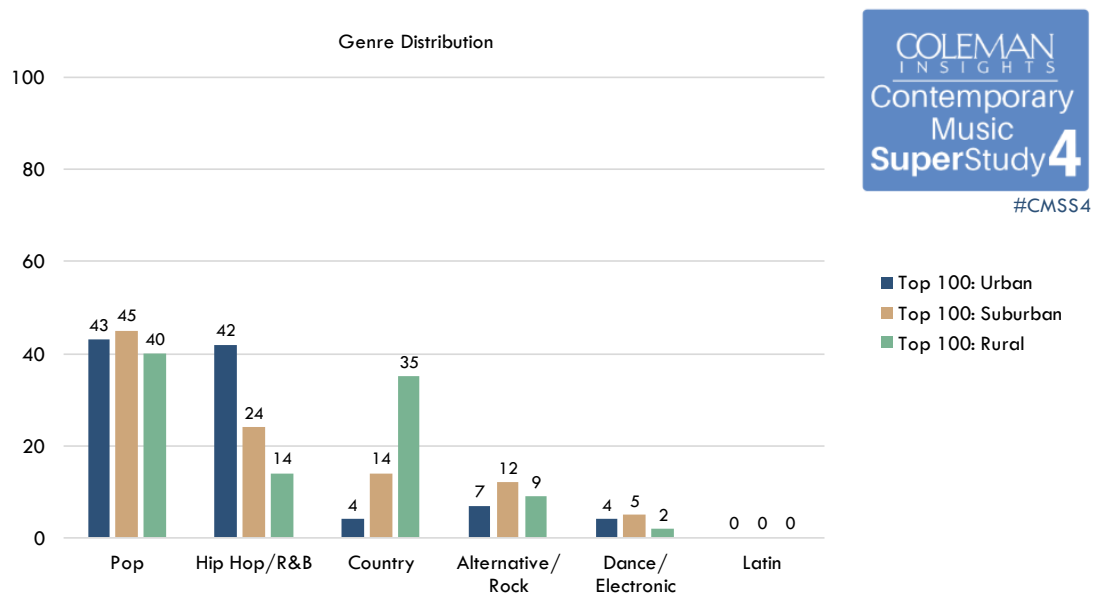
A common thread between Urban and Rural consumers is the strong performance of Pop, as Pop titles also lead—at 40%—for the largest share of the Rural Top 100. Conversely, Hip Hop/R&B and Country perform dramatically different between with Urban and Rural consumers; at 35%, Country titles rival Pop for leadership among those who live in rural areas, while Hip Hop/R&B songs comprise only 14% of the 100 best-testing songs with Rural consumers.

Suburban consumers fall somewhere in the middle of Urban and Rural consumers. Like the other two groups, Pop titles lead at 45%, with Hip

Hop/R&B titles making up 24% of the Suburban Top 100, followed by Country and Alternative/Rock, at 14% and 12%, respectively.

These patterns look similar when we compare the Top 100 songs among listeners who describe their political affiliation as Liberal-leaning, Moderate, or Conservative-leaning. Pop leads with Liberal-leaning consumers and Moderates, while Country makes up the largest proportion of the 100 best-testing songs with Conservative-leaning consumers. Furthermore, Hip Hop/R&B titles perform best with Liberal-leaning consumers, while Country's performance is significantly stronger with Conservative-leaning consumers than it is with either of the other groups.

Genre Distribution

Legend:
- Top 100: Liberal Lean
- Top 100: Moderate
- Top 100: Conservative Lean

Genre	Liberal Lean	Moderate	Conservative Lean
Pop	43	41	36
Hip Hop/R&B	40	23	9
Country	3	22	46
Alternative/Rock	11	10	6
Dance/Electronic	3	4	3
Latin	0	0	0