



2011 Orpheus Media Research Consumer Survey Executive Summary

Overview

In February 2011, Orpheus Media Research (OMR), an advanced music research and development company that automates the search, analysis, and discovery of music, commissioned its first consumer survey.

The survey focused on:

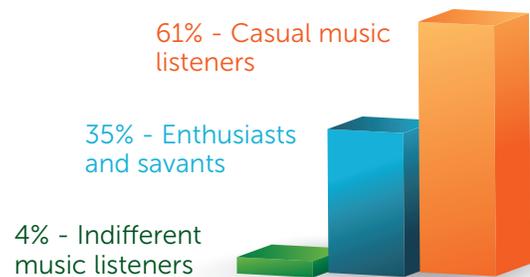
- Consumers' thoughts and understanding in regards to music search
- Consumers' areas of frustration when it comes to music search
- Consumers' appetite/desire for a sophisticated discovery tool
- Consumers' spectrum of needs and wants when it comes to music search

The national study was conducted and administered online in February 2011. The margin of error for the survey is 4 percent.

Respondents defined themselves as:

Survey Sample

The survey polled 500 US consumers aged 18 and above, identifying respondents' current music habits and the role music plays in their lives. Forty percent of the respondents listen to music more than 3 hours per day. Thirty-five percent of the respondents rated themselves as music enthusiasts or savants, while only 4 percent considered themselves indifferent to music.



- 67 percent of enthusiasts/savants and 23 percent of casual/indifferent music listeners are interested in discovering new, unheard of music
- 29 percent of enthusiasts/savants and 8 percent of casual/indifferent music listeners spend an hour or more searching for new music per week
- 63 percent of enthusiasts/savants and 34 percent of casual/indifferent music listeners would use a website that could accurately match their favorite songs to new music they haven't heard before

Key Finding

OMR's consumer survey revealed that consumers are interested in learning about new music and are actively using available tools, but that finding new music and artists can be hard to do. Current music search technologies are still lacking, leaving the radio and word of mouth as the biggest drivers for new music discovery.

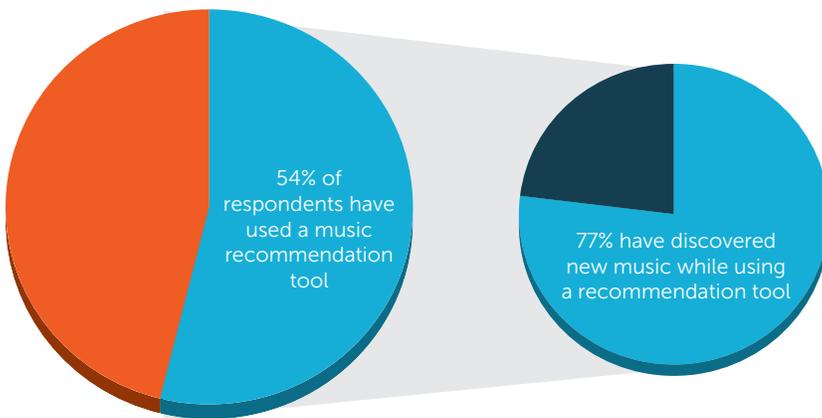




Music Recommendation Tools are Opening Doors to New Music — But There is Still a Catch

Fifty-four percent of the respondents have used a music recommendation tool and, of those, 40 percent use it either daily or a few times per week. Notably, 77 percent have discovered new music while using a recommendation tool, and 92 percent continue to listen to that new music, often recommending it to others. Yet, these respondents feel that the accuracy of available recommendation tools is lacking with 40 percent saying that the results are accurate 50 percent or less of the time. Other challenges identified were the time it takes to search (27 percent) and receiving too many results from a search (24 percent).

Of the 87 percent of respondents who actively search out new music, 22 percent find it difficult or nearly impossible to discover new, unheard-of music that they like.



Recommendation tool users identified challenges:

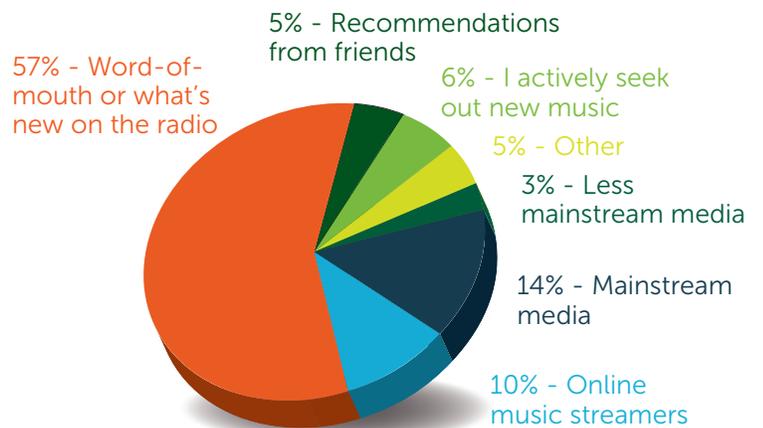
- 40% felt that results are accurate 50% or less of the time
- 27% felt that searches take too much time
- 24% felt that the tools provide too many results

Music: The Role it Plays in Everyday Lives of Consumers

Consumers see music as an integral part of their every day life, as 59 percent of consumers identify music as playing a key role in their social life. Forty percent of consumers indicate that they have more than 1,000 songs (tracks) in their personal music library, signifying the large amount of music downloaded by consumers. Fifty-seven percent of the respondents indicated that they most often relied on radio or word of mouth to learn about new music and 14 percent indicated that they relied on mainstream media.

Forty percent of consumers are interested in finding new ways to discover new music but 82 percent feel that the music industry is only doing an average to poor job in their ability to identify good music.

Which method do you use most often to learn about new music?



About Orpheus Media Research

Orpheus Media Research is an advanced music research and development company that automates the search, analysis, and discovery of commercial-use music. For more information, www.orpheusmediaresearch.com.

