

THE CLASSICAL REVIVAL IN 2020

A report by BPI, Deezer and the Royal Philharmonic Orchestra





Deezer, BPI and the Royal Philharmonic (RPO) present their first ever collaborative report which brings together streaming data with consumer opinion research.

Using Deezer's streaming data, the report highlights the demographic profile of Classical listeners across a range of countries and whether that has changed during lockdown.

The market research data (provided by the RPO) reports on consumer attitudes to music during the period of home isolation. The RPO has seen online and social media audience engagement soar during lockdown and it has premiered several online concerts.

All the organisations involved in this report share a commitment to broadening the range and appeal of Classical music to a broader and younger audience.

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INTRODUCTION



KEY FINDINGS

- In a one-year period (April 2019- 2020), there was a 17% increase of Classical listeners on Deezer worldwide.
- In the last year, almost a third (31%) of Deezer's Classical listeners in the UK were under 35 years old, a much younger age profile than those who typically purchase Classical music.
- RPO's research found that under 35s were the most likely age group to have listened to orchestral music during lockdown (59%, compared to a national average of 51%).
- There were a greater number of female listeners in the UK listening to Deezer's Classical playlists during lockdown.

feel good classical

- Classical fans preferred mood-based music during lockdown. Streams on Deezer's 'Feel Good Classical' playlist grew by 424% in the third week of March compared to the week before.
- 35% of respondents in RPO's research feel orchestral music helped them relax and maintain a sense of calmness and wellbeing, with 18% saying listening had lifted their spirits.
- RPO's research found under 35s were most likely to say they intended to support arts organisations to help them make up for lost income after COVID-19 restrictions are lifted (64% compared to a national average of 43%).
- Classical fans appreciate a full body of work and over-index on album plays. They also have a broad taste in music, listening to many more genres than fans of Rap or Rock.



DEMOGRAPHICS

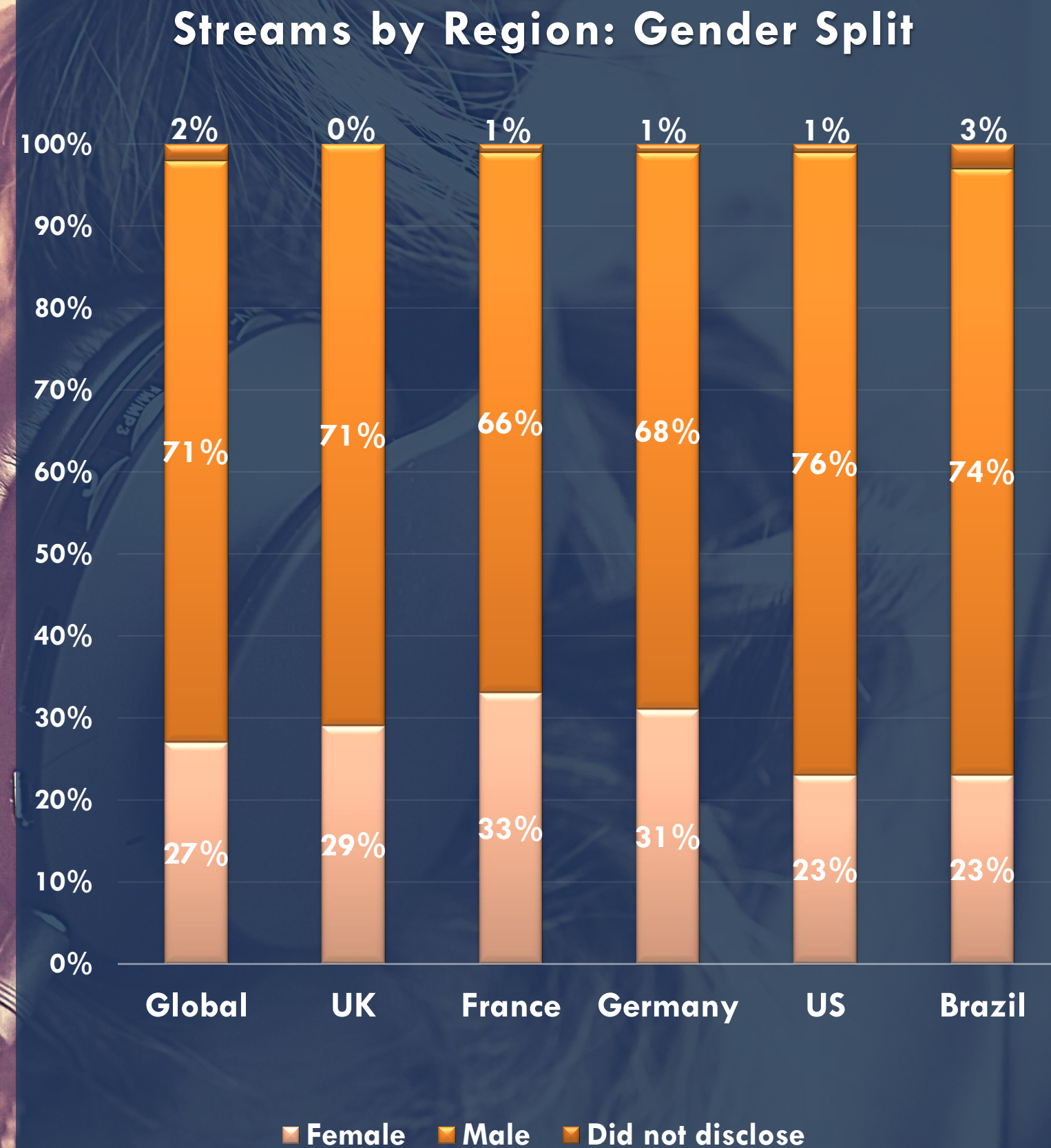


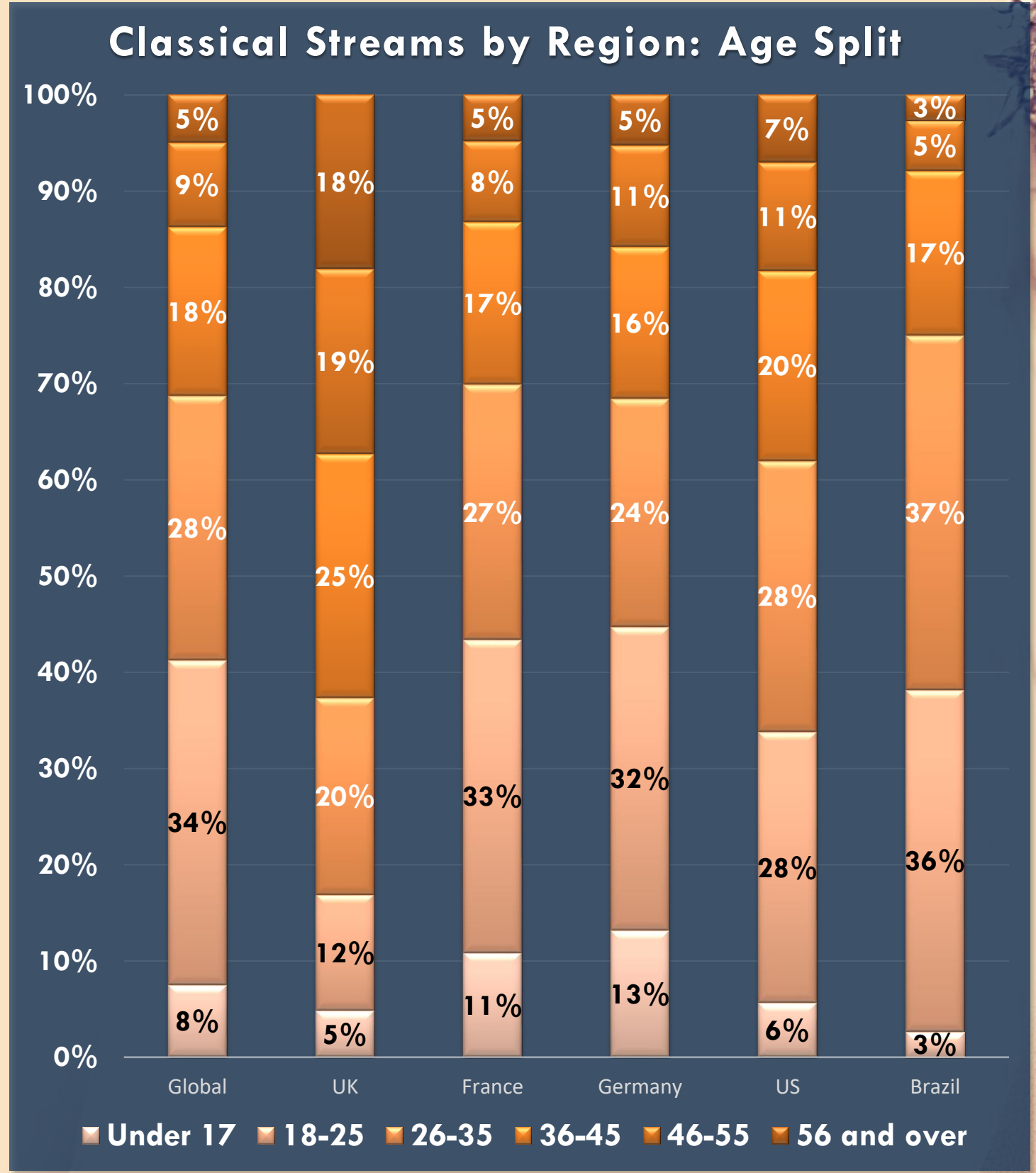
Demographics: Gender

Between June 2019 and June 2020, men accounted for 71% of Classical streams globally on Deezer.

France has the most streams by females, with plays by women representing one third of the total in France.

Plays by women represented nearly 30% of the total in the UK. This is less than the other two European countries, but slightly more than the global average





Note: figures re-percentage to omit those whose age is unknown

Streamers aged under 35 accounted for over two thirds (69%) of Classical music played globally between June 2019 and June 2020.

Streams by under 35s rose by 17% worldwide in the last year

In the UK, over 60% of Classical streams are from listeners under 45 years old.

RPO also found under 35s were the age group most likely to listen to orchestral music during isolation (59%, compared to a national average of 51%).

Demographics: Age Group

ORCHESTRAL INSIGHTS FROM LOCKDOWN





RPO Research Overview

Over the last four years the RPO has conducted nationwide consumer research to better understand the public's terms of engagement with orchestral music – possibly the most extensive archive of consumer insight on Classical music in Britain today.

As early as 2018, RPO's data suggested that more than three in five people (62%) would like to broaden their musical horizons and learn about music genres they were unfamiliar with. Within this, orchestral music proved to be more popular than Rock, Folk, Jazz and Blues. Overall, 22% said they would like to discover more about orchestral music.

The appeal of Classical music related to the genre in its broadest form – film, video and computer game music was valued alongside the timeless repertoire of the great composers.

Further, given the growth of streaming, downloading and - more recently - online concerts, this combination of the old and the new presents the role for the orchestra in modern society.

The research was conducted for the RPO by international research company Maru Blu in May 2020 among a nationally representative sample of 2,000 respondents. The survey was conducted online. Earlier cycles of research were done at quarterly interviews involving a similar methodology and consistent sample sizes.

Under 35s and orchestral music

The RPO's new study took place (May 2020) as the world was some weeks into the COVID-19 pandemic and found that orchestral music had grown in popularity among young people during lockdown.

During home isolation, under 35s were those most likely to have listened to orchestral music (59% compared to a national average of 51%):

55%

18 – 24
year olds

60%

25 – 34
year olds

51%

35 – 44
year olds

44%

45 – 54
year olds

59%

Net:
Under 35s

43%

55 – 64
year olds

51%

65+
year olds

Q: Which genres of music have you listened to at home during the isolation period?
Orchestral or Classical music,
Opera, Current Pop/ Electronic/
Dance, Rock/Metal,
Gospel/Religious, Jazz,
Country/Folk, Musicals, R&B,
Blues, Rap?





Lockdown and creative expression at home

- The RPO lockdown research also suggested that music was part of a broader creative outlet for young people during home isolation.
- Under 35s were also most likely to have spent quality time on a number of creative and artistic activities during the home isolation era, specifically to enrich their day and boost their overall sense of wellbeing.
- Beyond exploring new music genres, the under 35s were also most likely to have started an online course (18%), spent time painting (13%), written a diary (11%) or written music (9%).

Q: During the home isolation period, which of the following have you taken quality time to do to enrich your day and boost your overall sense of wellbeing?

Classical and musical instruments



Interest in Classical music among younger people can partly be explained by children's first experiences of learning a musical instrument from a young age, which often relates to orchestral instruments.

During lockdown, playing a musical instrument or doing more practice was a key creative activity for many children, particularly amongst young families.

Nationally 66% of those aged 35 or under who have children reported that their children either play or are learning to play a musical instrument.

And 74% say their children have completed an hour or more of music practice a week during the period of home isolation.

Previously, RPO research asked children under 18 which musical instruments they would like to learn – and seven of the top 10 choices related to orchestral instruments. This may help to explain the broader resurgence of interest in listening to orchestral music among the under 35s more generally.

Supporting the arts post-lockdown

The RPO's research also found under 35s are most likely to support arts organisations and artists to help them make up for lost income after restrictions are lifted (64% compared to a national average of 43%).

Heightened interest in listening to music and exploring new genres in lockdown means many people are looking forward to concert performances when it's safe to do so. Under 35s are looking forward the most to going back to concerts (66% compared to a national average of 48%).

12% of under 35s said they'd like to get back to the concert hall as soon as possible, with 42% anticipating it would be a priority within six months of lockdown restrictions easing.

Q: In what ways will you be supporting arts organisations to help make up for lost income once the Coronavirus lockdown has been lifted?

	Under 35s	National Average
I will book tickets to more concerts/events than I would normally	23%	15%
I will encourage my friends and family to book tickets	16%	10%
Buying books/DVDs/CDs produced by artists & arts organisations	15%	11%
I will buy merchandise	14%	9%
I will make donations	13%	8%
I will become a friend/member or the artist/organisation	12%	7%

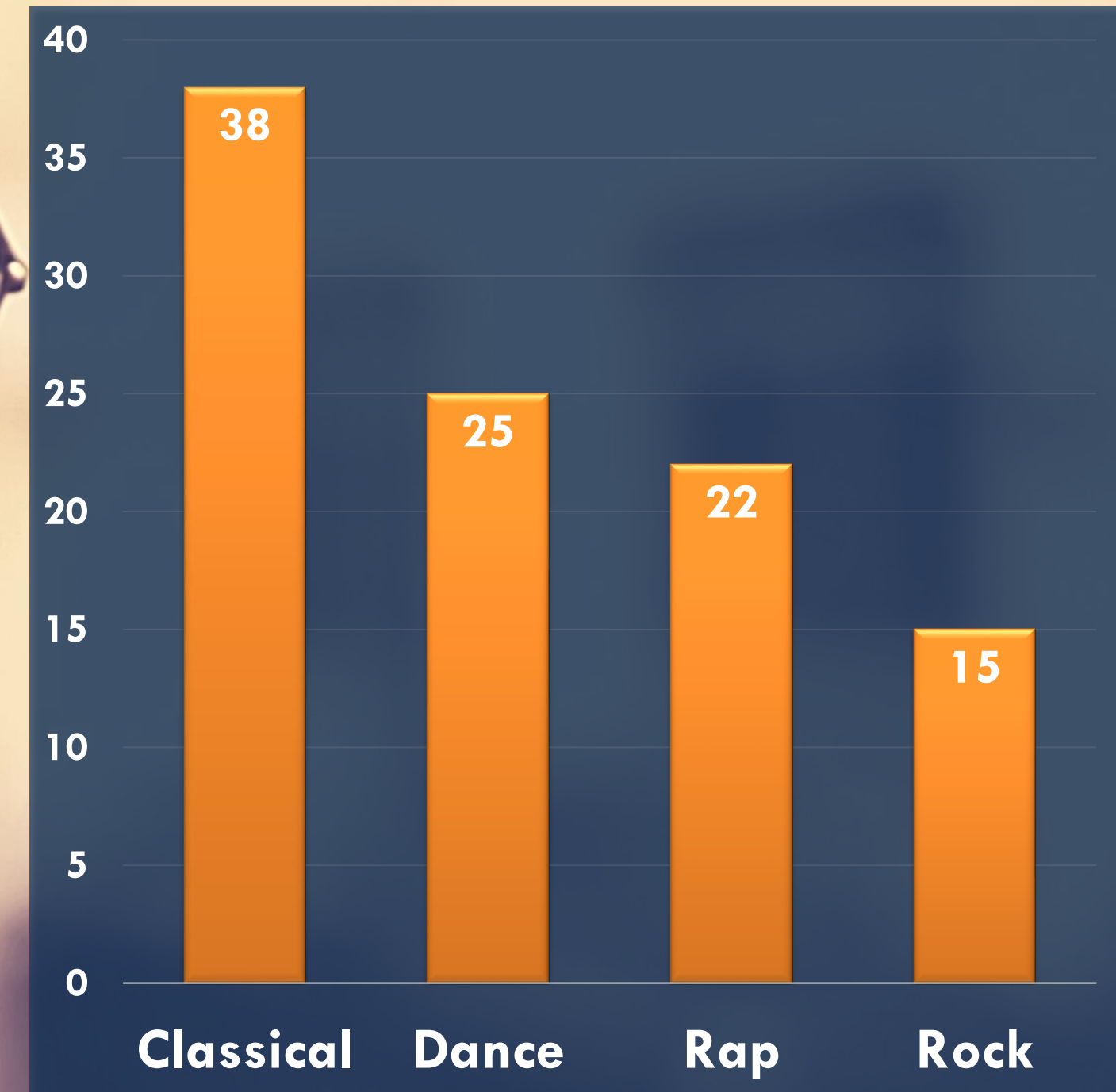
CLASSICAL STREAMING INSIGHTS



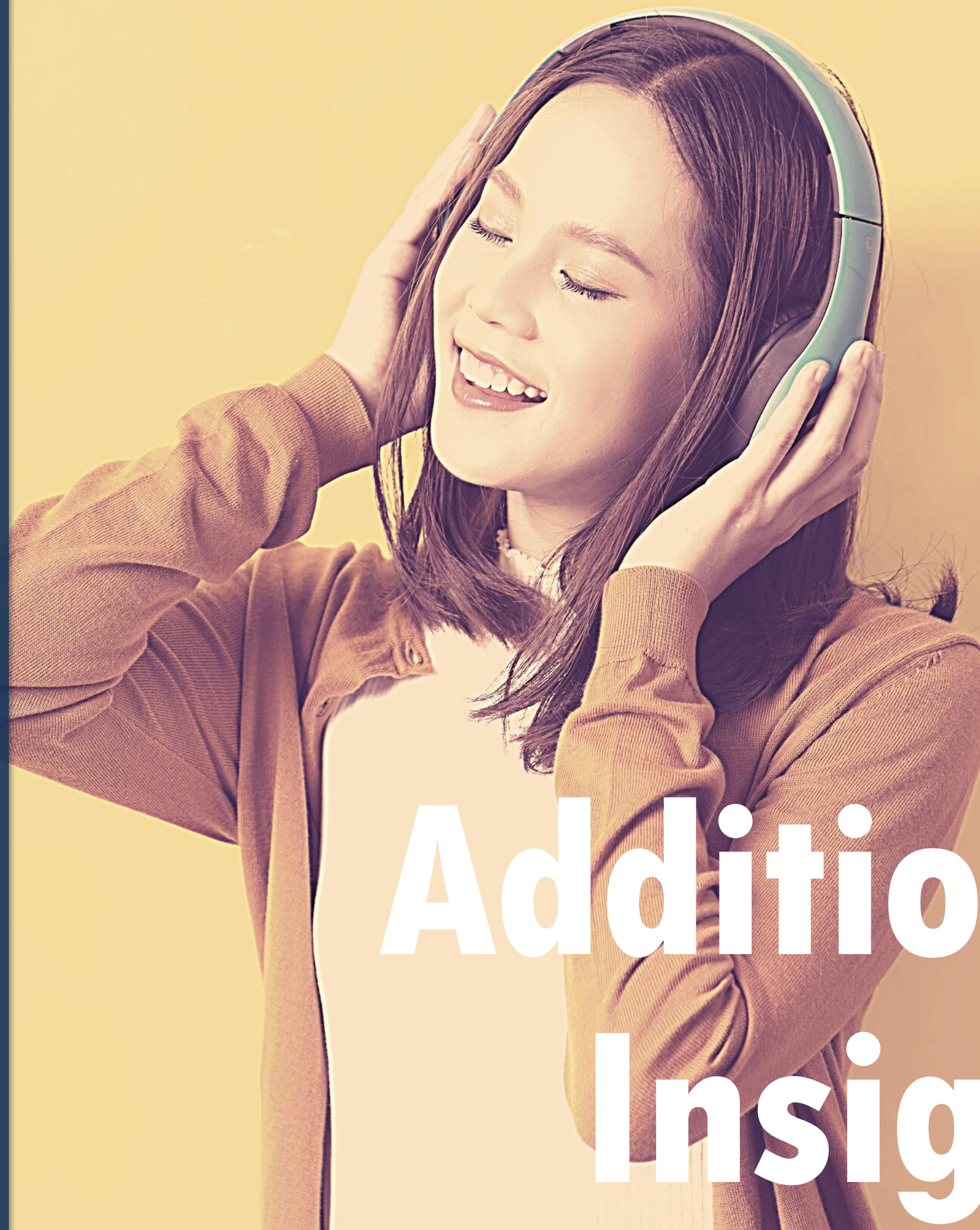
Number of Genres Listened To

Worldwide, Deezer's Classical fans have broader musical tastes compared to fans of other genres. On average they listen to 38 distinct genres and sub-genres of music.

In contrast, fans of other major genres like Dance, Rock and Rap, listen on average to 21 genres and sub-genres.



- **On average, over half (52%) of Deezer's Classical listeners stream for at least 15 days in a typical month. They stream 4.4% more music on average than other Deezer users.**
- **During lockdown in the UK, streams of Classical music by 36-45 year olds grew by 12% between February and May 2020.**
- **Classical music is streamed more on voice-activated devices than on mobile. In June 2020, the ratio was 170% higher compared to mobile.**
- **Wolfgang Amadeus Mozart grew in popularity after Lockdown began, with his global streams growing 54% on March 22nd, compared to the same day the week before.**
- **Mozart's streams were also 38% higher in March 2020 than in February, with 19% of the stream share from 18-25's.**



Additional Insights

SOURCE OF STREAMS



Source of Classical Streams

	Global	Brazil	France	Germany	UK	US
Playlist	44.4%	54.5%	47.5%	46.2%	42.9%	40.9%
Album	24.1%	20.8%	25.6%	25.9%	24.5%	23.2%
Artist	10.2%	13.8%	9.6%	8.0%	9.4%	9.8%
Track	9.7%	4.3%	5.5%	10.4%	11.3%	13.3%
User's Playlist/Library	5.8%	2.8%	7.0%	5.2%	5.6%	5.5%
Smart Tracklist	2.4%	1.8%	2.4%	1.9%	1.5%	1.8%
Radio	2.2%	0.9%	0.9%	1.1%	3.4%	4.6%
Shuffle	1.2%	1.0%	1.6%	1.3%	1.4%	0.9%

Curated playlists are the biggest source of Classical streams globally and in every country.

Individual track selection and plays direct from an artist's page are also popular.

Just under 5% of plays in the UK come from a user's own playlist.

Period: January-June 2020.

Note: analysis excludes all streams where origin is unknown and has been re-percentage

Source of Plays: Genre Comparisons (UK)

	Classical	Dance	Pop	Rap	Rock
Playlist	42.9%	60.1%	61.6%	63.5%	49.4%
Album	24.5%	5.5%	10.2%	10.7%	12.7%
Artist	9.4%	5.2%	8.4%	7.0%	9.5%
Track	11.3%	7.2%	8.4%	5.8%	7.3%
User	5.6%	17.7%	6.3%	8.4%	15.4%
Smart Tracklist	1.5%	2.0%	2.2%	2.0%	2.4%
Radio	3.4%	0.0%	0.6%	0.2%	0.5%
Shuffle	1.4%	2.2%	2.9%	2.4%	3.3%

Period: January-June 2020

Curated playlists drive a large number of streams for Classical but are an even bigger way to consume music across other leading genres.

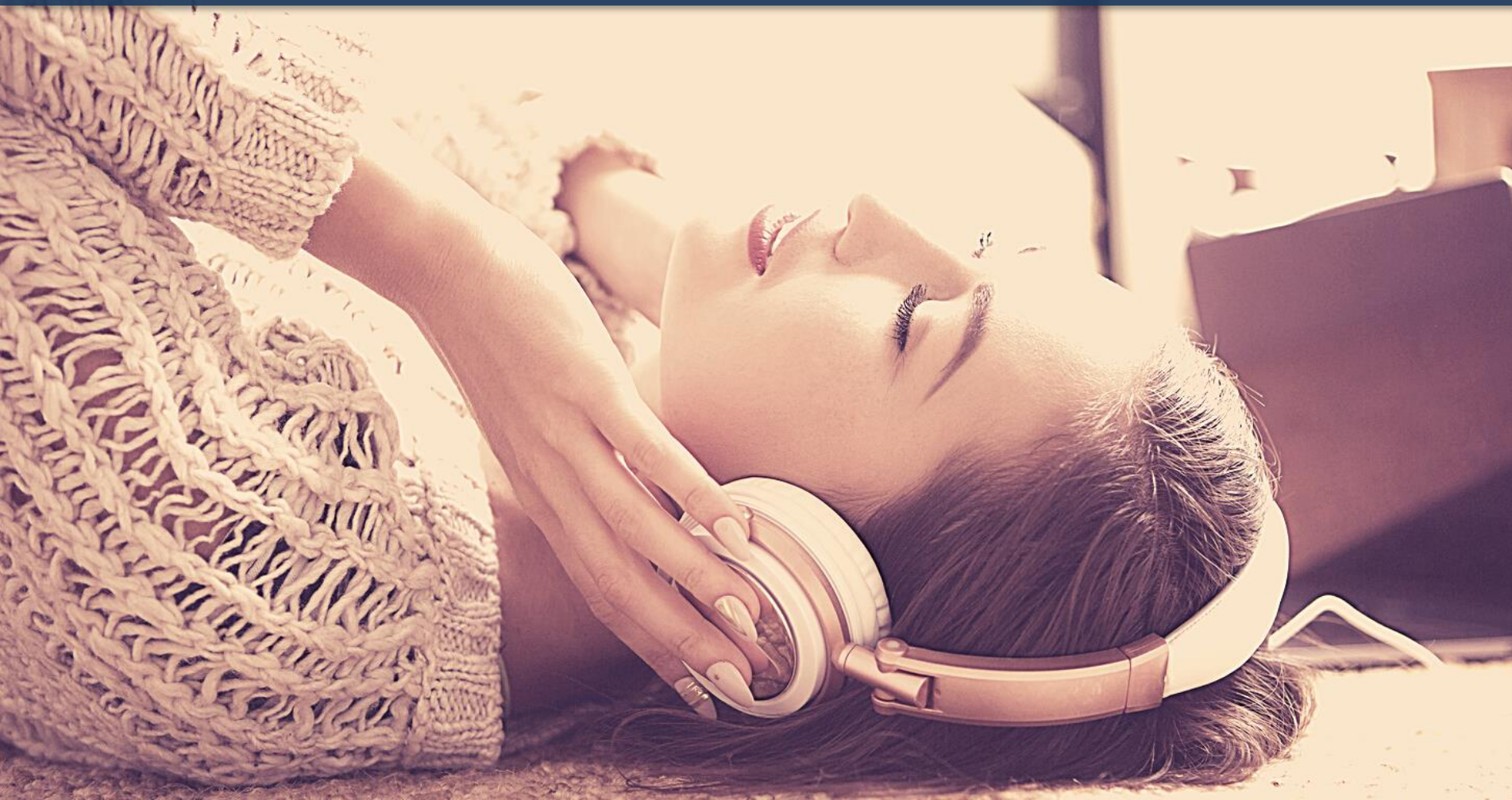
Almost a quarter of Classical streams in the UK came directly from albums. This was much higher than for major genres such as Rock, Rap and Pop.

MUSIC FOR YOUR MOOD



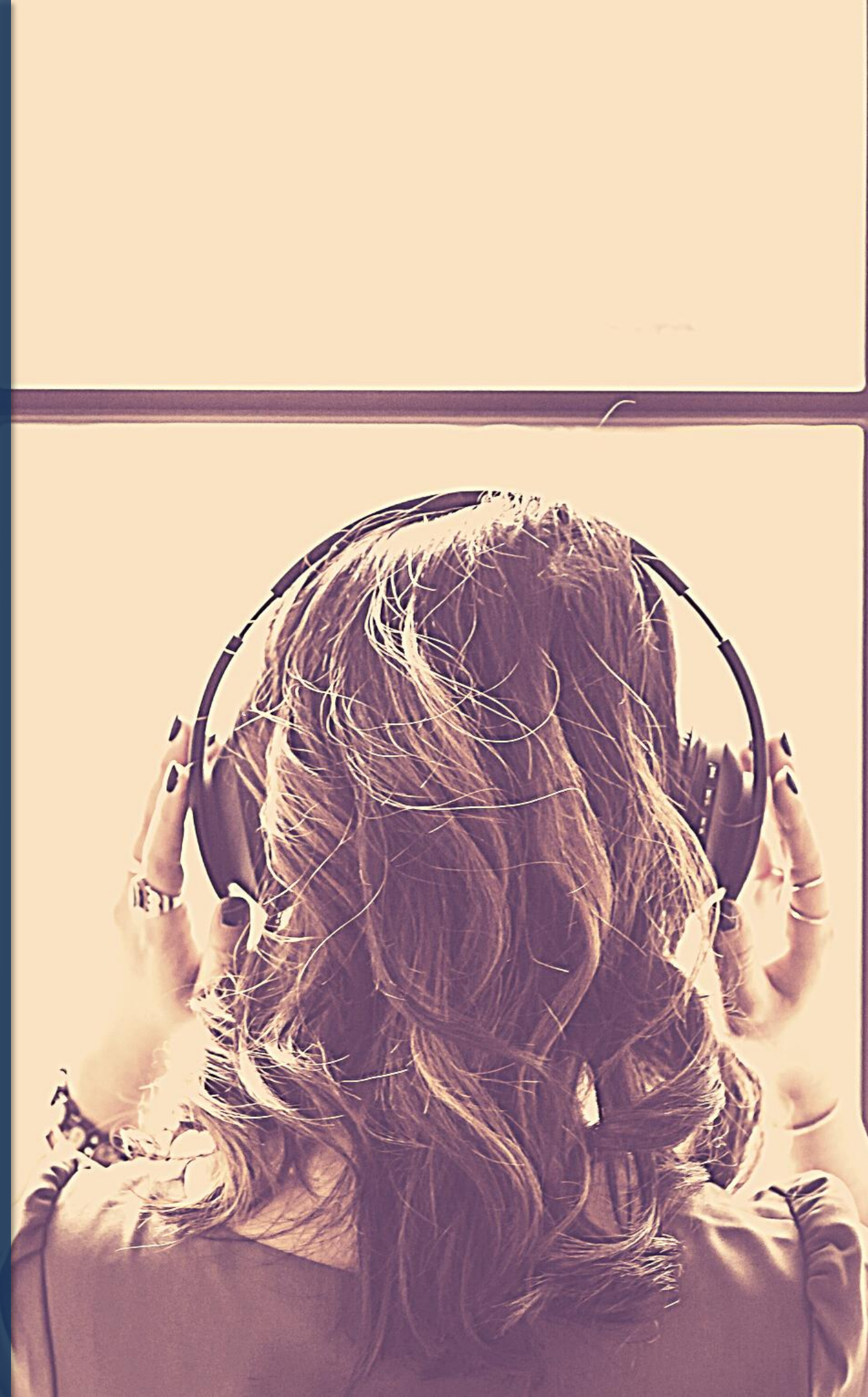
A Wellbeing Tonic for Anxious Times

In the RPO study, those who listened to orchestral music during the home isolation across all age groups period cited positive, calming and wellbeing benefits: 35% of these respondents said that orchestral music helped them to relax and to maintain a sense of calmness and wellbeing – with 18% saying that listening to orchestral music had lifted their spirits. This may well be the reason why Deezer's plays of mood and relaxation playlists soared during lockdown.



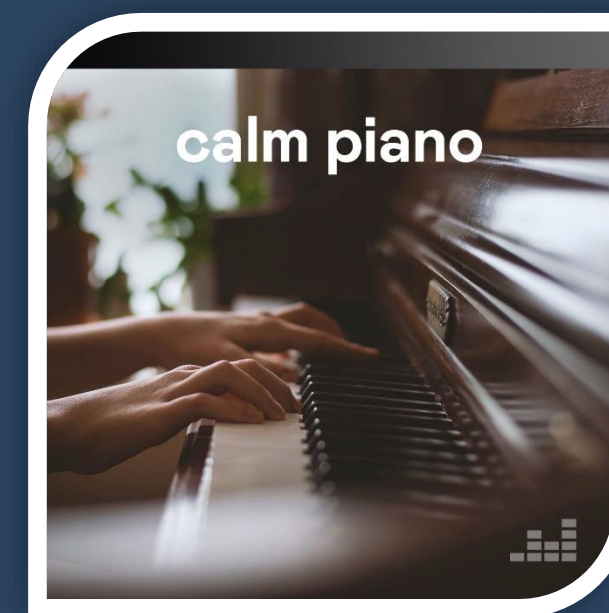
RPO's research also found that younger people (aged under 35) that had enjoyed this music during lockdown were the most likely to cite a range of additional, positive lifestyle benefits: around one in five young people (19%) said orchestral music was a good genre of music to listen to whilst working or studying and 12% said they had been inspired to discover orchestral music more fully while they had more time at home. Also 15% of respondents said enjoying listening to orchestral music had encouraged them to consider learning a musical instrument.

Deezer features 36 Classical playlists on its dedicated Classical channel. Like RPO's research shows, the most notable trend is a surge of younger listeners, particularly in mood and relaxation Classical music. There was also an increase of female fans across Deezer top 5 Classical playlists:



CALM PIANO focuses on “piano music to stay focused, calm down, or meditate”. It features music by artists such as Nils Frahm, Ludovico Einaudi and Max Richter. The most-played track is from pianist Alexis Ffrench's *Dreamland*.

In the last 12 months, women accounted for 27% of streams. However, in lockdown (March - June 2020) this increased to 31%. The percentage of listeners aged under 35 overall also grew in lockdown, to 54% (from 49% across the 12 months period). The age of those streaming the playlist the most also changed from 36-45 year olds to 26-35s.





CLASSICAL FOR SLEEP saw a huge increase in listening during lockdown. In March, there was a 284% stream increase of this playlist in the UK compared to the month before, with under 35s responsible for the boom. Between March and May, streams by under 35s represented the majority (51%) of plays, compared to its usual yearly average of 42%. A fifth (20%) of streams in lockdown also came from listeners aged under 20.



As with Calm Piano, the playlist **BEST CLASSICAL OF ALL TIME** (“an introduction to the best Classical music”) features selections from Bach, Beethoven and Schubert. The most popular single piece of music is a performance by Camille Bertholet from Vivaldi’s *Four Seasons*. Overall, the playlist appealed to more female listeners during lockdown (24% compared to 21% in the June 19 - June 20 period). Overall, 35-45s still listened the most throughout, accounting for about a quarter of all streams.





The **FEEL GOOD CLASSICAL** playlist, featuring artists like Jess Gillam and Lang Lang, also experienced a huge growth in plays when the pandemic first hit the UK. The playlist experienced **424%** more streams on Thursday 19th March 2020, compared to the same day the week previously. Over a third of its listeners (**36%**) were aged under-35.



CLASSICAL GOES POP offers “Classical versions of your favourite pop hits”. It breaks the misconception that Classical must only feature classic pieces and resonates particularly with younger fans. Between June 2019 and June 2020, under 35s accounted for over half (**53%**) of all streams. Its most popular track globally in the past year was a cover of Ed Sheeran’s *Perfect* by the duo 2Cellos (pictured below). Other popular tracks include Chloe Flower’s version of Lil Nas X’s *Old Town Road* and Ramin Djawadi’s re-imaginings of tracks by Nirvana and The White Stripes, as featured in the TV drama *Westworld*.



MOST-STREAMED ARTISTS AND COMPOSERS



The Italian pianist and composer, Ludovico Einaudi, was the most streamed Classical artist in the UK and worldwide during the first six months of 2020. Contemporary performers and composers such as Max Richter, Olafur Arnalds and Ramin Djawadi also featured in Deezer's UK top 10.

Lockdown resulted in a stream boost for a lot of Classical artists. The pianist Khatia Buniatishvili saw a 35% global monthly stream boost in March 2020, with 23% more plays of Martha Argerich's music. Alexis Ffrench's UK streams grew by 19%.

In the same time period, more traditional composers such as Wolfgang Amadeus Mozart and Johann Sebastian Bach had a surge in streams, particularly with under 25's. Mozart had 38% more streams worldwide, with 18-25s accounting for almost a quarter of these plays. In the UK, the day after lockdown was announced on March 23rd, Mozart's streams spiked suddenly by 8%.

	Worldwide	UK
1	Ludovico Einaudi	Ludovico Einaudi
2	Yann Tiersen	John Williams
3	Florent Pagny	Andrea Bocelli
4	Andrea Bocelli	Max Richter
5	Ramin Djawadi	Luciano Pavarotti
6	John Williams	Ólafur Arnalds
7	Max Richter	Ramin Djawadi
8	Lindsey Stirling	Lindsey Stirling
9	Luciano Pavarotti	Gavin Greenaway
10	Sofiane Pamart	Yann Tiersen

Artists' Quotes

“Classical music has inspired so many people over centuries, and at this time in history it seems more important and relevant than ever before as it brings people together. There’s no barriers with classical music and its benefits are limitless – it can inspire, uplift or help us to just chill out – something a lot of us need right now. We absolutely love seeing people of all ages attending our concerts and listening to our music online, but we’re particularly happy to see young people getting more and more into classical music as they become the future fans and advocates for the genre we love.”

Camille & Julie

“It’s heartening that the appeal of classical music is clearly expanding and connecting with a broader and younger audience. The ease of discovery and connectivity through streaming must be playing its part, but so too is the global reach and power of film soundtracks, which draw such inspiration from classical composition”

Alexandre Desplat

“It is wonderful that new audiences are coming to classical music during this time of anxiety. Streaming offers listeners the chance simply to follow their enthusiasms through the musical universe without any boundaries, and I’m really happy to hear that many people are turning to classical music for the first time. As well as being a historical art form, classical music is also part of what is happening now and it is great to see more people embracing it.”

Max Richter



Artists' Quotes

“To know that an increasing number of young people are engaging with classical music is absolutely brilliant news!

In times of distress and desperation, music can inspire, unite and transport and I think this trend outlines the magic of the art form. Classical music is a genre that listeners can sometimes approach with certain preconceptions and I think, as humans, our brains are wired for categorisation.

With music, I feel it is impossible to place something in a category, genre or box that can sufficiently provide us with enough information about what on earth the music may sound like, the emotions it may evoke or even the style of composition – the immeasurable entity we call ‘music’ is inexplicable, something so powerful and evocative: beyond categorisation. Classical Music is an incredibly broad term and is used to describe so much music and this, I feel, can sometimes be unhelpful but it’s fantastic to hear more young people are engaging with (and perhaps more importantly, have the opportunity to engage with) the art form through streaming services, radio and the ever expanding range of platforms found on the internet.”

Jess Gillam

“Classical music has always been a journey to be enjoyed at a pace that frankly, our previous lives could not offer in terms of time and mental space. The pandemic has flipped our lifestyles, tastes and habits: the things we used to do to relax are no longer the same. As a young person in classical music, it might seem an anomaly to many out there - but I’ve seen a growing number of young people becoming emotionally invested in this beautiful music.”

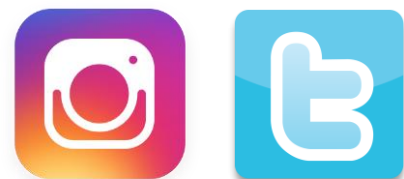
Ray Chen





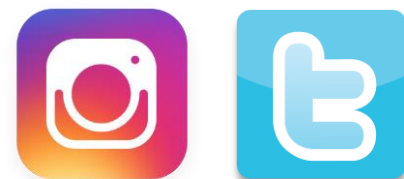
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