

Music reception in the digital age – empirical research on new patterns of musical behaviour

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Abstract

Developments since the 1990s make it abundantly clear to what extent new conditions can cast doubt upon previously unquestioned ideas about how people experience music. Twenty years after the internet was opened up to all comers with the graphics-enabled web browser Mosaic, new behaviours related to music have become established which would never before have been thought possible. But it is still the case that not all experts understand (or respect) the new ways in which members of "generation Web 2.0" receive their music. Empirical music sociology can help here. Using reliable data on the population of the small European country Austria this essay demonstrates where the deep divisions between "digital natives" and "digital immigrants" in music reception already appear irreversible, and also where they have played almost no role for a long time now.

Keywords: Music consumption behaviour, empirical research, representative survey, music sociology

1 Music reception in a changing society

Since the 1990s people's experience of music has changed at a breathtaking pace. Technical, economic and social developments throughout society have radically changed the conditions for making, distributing and receiving music.

The most radical change of recent years stemmed from the technical possibility of digitising recorded music as binary code, already developed in the 1980s and referred to by music sociologists as "digital

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mediamorphosis". The most far-reaching effect of this development is that recorded music no longer requires a physical storage medium, but can now be "played" via data lines. This ability became relevant for day-to-day music consumption via four further developments in the second half of the 1990s: (a) the consolidation and growth of the internet, (b) the increasing capacity of data lines, (c) the ability to compress the data volumes to be transferred to around one tenth of the original size (mp3), and (d) the development of a search engine for automated access from individual computers (Napster). Despite the patience required in the early days (downloading a three-minute track took around 70 minutes in 1998) access to music now occurs against a backdrop of completely new conditions:

- A great deal of music is available at any time (without payment) via the internet.
- It is not possible to prevent the (unpaid) retrieval of this music.

Many internet users – principally young people with a lot of time and little money – used this new ability intensively. Within the music media industry this was at first underestimated, then later "recognised" as the cause of falling sales figures (fig. 1).

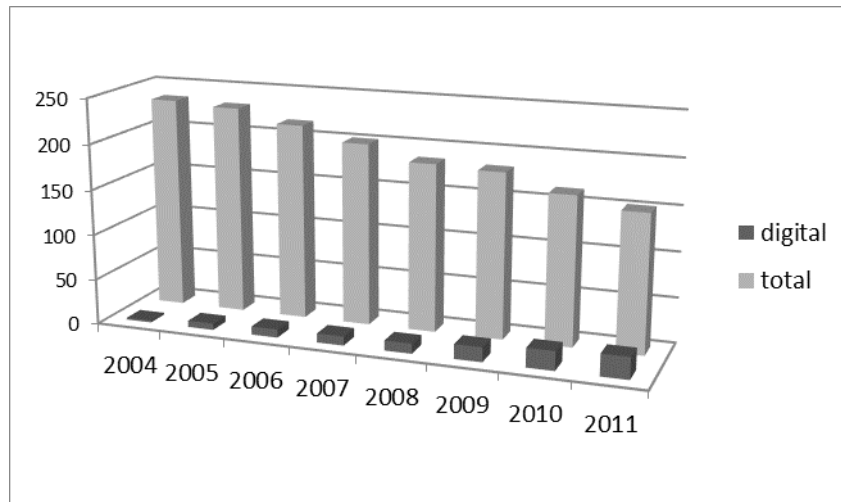


Figure 1: Music sales in Austria in million EUR (IFPI Austria)

Although this cause has been the main focus of discussion within the music industry for more than ten years, to this day no scientific evidence of causal connections has been found.²

Around ten years ago the relevance within society of the internet as a music source received yet another boost with the emergence of "Web 2.0". The new situation, whereby receivers of information could now also send it, allowed the "ordinary user" to take part in the shaping of the "internet database". This occurred intensively thanks to the Bit-Torrent process (whereby very small information chunks are scattered, gathered and reassembled) and also to music recommendations by mail order companies and music streaming providers. As it is impossible to carry out any action on the internet without leaving tracks, past consumption automatically influences future (music) offers.

These new conditions and possibilities for access to music are plain to see, however their actual influence on music listeners' everyday life remained unclear for a long time. Empirical music sociology is accus-

² For an overview see Peter Tschmuck's weblog musicbusinessresearch.wordpress.com.

tomed to deducing its research questions *inter alia* from unexplained connections of changing economic conditions and music users' new patterns of behaviour.

It is only right to mention at this point, however, that music sociological research is also carried out with the help of hermeneutic interpretation of texts, or a critical-philosophical eye. But to understand social behaviour – and here we are looking at music reception (Blaukopf 2012 [1969], Blaukopf 2012 [1982]) – we must rely on empirical social research. Nonetheless, for a critical judgement of the value of the following findings, we must appreciate that empirical music research also has its weaknesses.

(a) In surveys, information on reception behaviour is usually gathered retrospectively. We have to rely on survey participants to remember correctly, and to really tell the truth.

(b) The particular influence of different cultural landscapes hinders the transferability of results, e.g. between European countries and the USA (Lehmann 1994, Blaukopf 1996, Neuhoff 2001). For example, Europe's cultural heterogeneity means it has no uniform folk music. The major role in national identity played by country and western music in the USA is mirrored by e.g. the *chanson* in France (but only in France), or German-language *Schlager* music in the Alpine countries (but only in that region).

(c) When gathering data on music preferences, our main problem is that day-to-day music choices depend on context and mood, and surveys usually do not take account of this (Russell 1997, Zillman & Gan 1997, Schramm 2005). Further, research settings severely limit the listener's sphere of perception (Sloboda et al. 2000).

(d) One problem which should not be underestimated is the bias found in answers due to social desirability. This cannot be completely avoided, neither with the aid of style labels (such as "jazz" or "classical music"), nor with the use of music samples in questionnaires (Karbusický 1975, SRG 1979, Müller 2000, Behne 2009, Huber 2010). In societies with a distinctly "high culture" questions on (music) preferences or (music) tastes are particularly susceptible to biased answers, as respondents

position themselves according to their perceived cultural level. Every society sees certain actions, opinions or other characteristics as especially positive. Any position clearly outside this "social desirability" will generally feel uncomfortable, and will thus be played down, if not avoided altogether. This "social desirability effect" may be enhanced by a shifted perception on the part of the respondent as regards past behaviour. In this way Reuband (2007) could demonstrate that in social surveys mainly the less-educated respondents could remember going to the opera more times than was in fact the case. As musical styles are often associated with a certain "typical" public, positively evaluating this music can lead to a kind of symbolic "fitting in", and thus a certain social positioning. This can most clearly be seen in demonstrations of denial regarding any music with whose public one would rather not be associated (Bryson 1996).

(e) Not least is the fact that only very few surveys cover a representative cross-section of the public; some studies do not even carry out random sampling. This is mainly the case for online surveys and polls of concert-goers. While the situation is not as bad as in US experimental music psychology – where the study authors' own students end up as the "guinea pigs" – even in current empirical findings on music reception we almost never find a representative sample of the population as a whole, which often makes e.g. comparisons between the behaviour of younger and older music consumers impossible.

2 Methods and state of research

The research results presented here are from a face-to-face survey conducted in 2009 with 1,042 Austrians by the Institute for Music Sociology in Vienna. The main focus of the survey was musical preferences, although some attention was also paid to the use of media and expectations of music. The sample is representative of the Austrian population as regards the social characteristics of gender, age, education, occupation, profession, migration background, size of home and federal state of residence within Austria. The present study derives its quality from its

representative nature and its comprehensive treatment of musical behaviour.

The only topical studies to have analysed a similar corpus of data were the 2008 Survey of Public Participation in the Arts by the National Endowment for the Arts (U.S.) and *Les pratiques culturelles des Français à l'ère numérique* (Donnat 2009). In both of these studies, however, music is only one aspect of a greater whole, and is less specifically considered than in ours. Furthermore, neither of these surveys is concerned in the same way with the effects of social characteristics on cultural behaviour. The study *Music Experience and Behaviour in Young People* from Bahanovich & Collopy (2009) offers a very thorough examination of music and a wealth of illuminating results, although the focus is clearly on "digital natives", as only 14- to 24-year-olds were surveyed.

AUTHORS	SOCIAL STRUCTURE DATA	So/Pe/Tr	RRS	TD
BMUKK/IFES (2007), Austria	G A E M	SoPe	+	-
National Endowment for the Arts (2009), U.S.	G A E M I	SoPeTr	+	-
Ministère de la Culture (2009), France	G A E P C	SoPeTr	+	-
ARD/ZDF Medienforschung (cont.), Germany	(media user typology)	Tr	+	+
Schramm/Hägler (2007) Switzerland and Germany	G A	Tr	-	+
Bahanovich/Collopy (2009), UK	(14-24 years old)	Tr	-	+
Huber (2010), Austria	G A E M P C R	SoPeTr	+	+

Caption: G(ender), A(ge), E(ducation), M(igration background), I(ncome), P(rofession), C(ity size), R(egional belonging); So(ciability music), Pe(rformance music), Tr(ansmission music); R(epresentative)R(andom)S(ample); T(heory)D(iven)

Table 1: Quantitative surveys on music reception

There is hardly any theory-driven empirical research on music reception which can claim to represent the whole population of the survey area and take account of social factors such as age or level of education. This can chiefly be explained by the great effort required in carrying out such a representative study. But even studies which do not satisfy the highest scientific criteria can offer valuable insights: the results of the state-funded study of culture users (Kulturnutzerstudie (IFES 2007)) are mainly of interest as a snapshot analysis of the reception of musical performances. However, conclusions regarding behaviour changes due to digitalisation are not possible here. As regards Austria's cultural structure, the findings offer few surprises: higher educational levels lead to greater participation in high culture, with women showing more initiative than men. More than two thirds of the population essentially never go to concerts. And the fact that the cultural activities on offer in remote areas tend to be rather scant and predictable is not really perceived as a problem by most people in such areas. Despite this there is overwhelming endorsement of the significant level of state funding of cultural institutions. Also interesting on this point are the results of a representative study of the use of time (Statistik Austria 2009), which give an insight into the importance of "sociability music"³ and recorded music. According to this study, Austrians spend more time listening to music as on any other secondary activity, with no difference in the genders. "Listening to music" as a principal activity comes after watching television, reading, walking, sport, gardening, surfing on the internet, relaxing and shopping; more or less on a level with "communicating by computer". Men listen attentively to music significantly longer than women (61 min. vs. 40 min. per day). Moreover 2% of women and 3% of men make music as a principal leisure activity.

Since the identification of a "Web 2.0 generation", also distinguished by new musical behaviours, there has been corresponding,

³ Music sociology differentiates between three types of music according to the spatial, temporal and hierarchical separation of production and reception: sociability music, performance music, transmission music (cf. Niemann 1974). In "sociability music" this separation scarcely exists, as the listeners take an active role in the music event (e.g. by singing or dancing). To hear this music, one must be in the right place at the right time. This listener experience cannot normally be reproduced.

patchy research allowing conclusions to be drawn about the particular consumption patterns of young people. In an extensive survey of concert-goers in Berlin, Hans Neuhoff (2007) demonstrated convincingly the influence of social stratum and educational level on music preferences; at the same time, however, he showed that the effects experienced, along with personal and social factors (such as age, indeed), depend mainly on the situation in which the music is received. The subject of "mp3 music" was the focus in an empirical investigation for the first time in an online survey by Schramm & Hägler (2007: 120). The key finding is that *"in most people, the mp3 age is characterised by deliberate, discerning and extensive music listening. Furthermore, many people claim that using mp3 has improved their music knowledge"*. With regard to the question of effects on traditional (recorded) music they uncover both complementary and substitution effects. However the base data and research methods used require us to be cautious about how much we read into these results.

A secondary analysis of representative data from Germany, carried out by Otte (2008), essentially represented an examination of the findings of the studies of Bourdieu (1984) and Schulze (1992) – which were both confirmed – and Peterson (1992; Peterson & Kern 1996) – which were both rebutted. According to this, the influence (in Germany) of educational level on music preferences is strong enough, as it ever was, to negate the relevance of musical omnivorousness.

In their work on "Music Experience and Behaviour in Young People" (British Music Rights 2008, Bahanovich & Collopy 2009) David Bahanovich and Dennis Collopy carried out ground-breaking research into music consumption behaviour. Unfortunately their chosen sample was neither random nor representative of the population as a whole, which severely restricts the scientific impact of the results. Nonetheless a whole range of interesting propositions regarding the new musical behaviours of young Britons (14 to 24 years olds) is brought to light. Alongside unsurprising findings, such as the value hierarchy of live music – music medium – owning mp3 – mp3 availability, of particular note is the emotional "affinity" of music and mobile phones: both are considered

very important, but people want to spend as little money as possible on either of them. A similar double standard lurks in basic attitudes to music: an emotional approach characterised by readiness to pay out and concern for the welfare of the musicians runs parallel to an experimental approach to music which is not (yet) emotionally endowed, which people mainly want to access quickly, simply and largely free-of-charge.

In the conclusion to a (music pedagogically-oriented) long-term study of how young Germans approach their music, Behne (2009: 109) firmly states that *"two characteristics of young people's cultural behaviour which are frequently and willingly criticised"* are clearly debunked by his research: conformity and lack of self-determination regarding music.

Finally it is worth noting that in the most recent edition of the regular study of German young people by the German Shell charity (Shell 2010) two tendencies are clear: "listening to music" has lost its (in 2002 still unchallenged) crown as favourite leisure activity to "surfing the internet". And age differences within the "young people" group are becoming ever more important in this regard, as shown in table 2.

12 to 14 years	Sport (41%), Playstation (40%)
15 to 17 years	Internet (67%), listening to music (66%)
18 to 21 years	Meeting up with people (63%), clubbing (43%)
22 to 25 years	Television (56%), books (32%), going to the pub (12%)

Table 2: Favourite leisure activities (Shell 2010: 98)

We can see, then, that there is a whole range of special factors to take into account when addressing young people's musical behaviour. Even within this group, the crucial dividing lines run through the social factors of ethnicity, gender, class and age. The representative compiling of valid findings on musical behaviour requires a great deal of effort, and this is probably why it is so rarely done (by independent research teams).

The following findings are based on 1,042 face-to-face interviews with randomly-chosen Austrians, and are representative of the whole population as regards gender, age, education/training, profession, work

situation, migration background, size of town or village, and county (Austrian federal state). The survey was comprehensively compiled; the results presented here are those concerning music consumption behaviour. There will be a particular emphasis here on the extent to which the younger age group (up to 30 years of age) differs from the older group, and on the role played by education and technical aptitude as an influential factor in musical behaviour.

Frequency analysis was used to check all responses for correlation with social characteristics. All correlations described here are significant. If no significant correlation is described, then none could be identified, such as for example between frequency of performance attendance and size of town of residence.⁴

As stated at the beginning, it is the great difference between the musical behaviour of Digital Natives and Digital Immigrants which will be the focus here. Marc Prensky, who pinned down this difference, described the phenomenon as simply a question of age and/or generation, stating: *"Today's students – K through college – represent the first generations to grow up with this new technology. They have spent their entire lives surrounded by and using computers, video games, digital music players, video cams, cell phones, and all the other toys and tools of the digital age"* (Prensky 2001: 1).

So one could simply say that young people are very different from everyone else. Correspondingly as a first step the following results show the principal differences between the under-30s and the over-30s.⁵ However we may also expect differences in music reception behaviour within the Digital Natives group itself, so a further cluster analysis was

⁴ Question groups of various measurement dimensions were scaled by factor analysis, to the extent that metric data levels and a sufficient number of cases or an approximate normal distribution were present. With metric variables aggregate indices were generated, and with ordinal variables count indices were generated. Relationships between variables or indices (measurement dimensions) were calculated using Spearman- (at ordinal data level) or Pearson correlations (at metric data level).

⁵ The margin was adjusted by 30 for calculation purposes, as every downwards shift minimises the number of respondents, and thus would have compromised the quality of the data. A limit of 20 would doubtless bring the identified differences much more clearly to the fore, as a few Digital Immigrants can be found between 20 and 30.

carried out with the aim of identifying sub-groups which were as homogenous and discrete as possible as regards their approach to music. It was then possible to describe the resulting groups far more precisely than merely via age, and to depict the "Generation Web 2.0" we identified in a less contrived way than the "Digital Natives" mentioned above. This was made possible by including variables in the analysis to measure the following characteristics:

- Evaluation of specific music styles: 8 items, of which 5 directly surveyed, and 3 as summarised indices of similar music styles (rural, virtuoso, electronic)⁶
- Preferred music consumption media: 7 items
- Interest and involvement in music: concert attendances (2 items), spending on music (3 items), actively playing music and singing (3 items), subjective assessment of the importance of music in one's own life (1 item) and the duration of attentive music listening (1 item).

An attempt was made through several rounds to isolate clusters.⁷ The five groups of the Austrian music listener typology allow the most precise interpretation. With more clusters some groups stand out only slightly, and with fewer clusters the typical character is lost.

⁶ Respondents were not invited to offer their favourite music, but rather to rate given music styles. For these ratings see Huber 2010.

⁷ A cluster centre analysis was carried out because the number of cases is relatively large, with this method having the advantage that elements could be exchanged between the groups during the merging process (cf. Backhaus et al 2008: 412). This method employs Euclidean distance as a measure, which is why the variables included, which partly have diverse scaling, were standardised for the analysis. Thus descriptions of individual groups do not relate to absolute figures, but are rather to be understood relative to the other groups. Moving averages were not used. Missing values were excluded in pairs. Characteristics were not weighted, so equilibrium was assumed. There is slight to moderate correlation in the variables, and the greatest Pearson's correlation (bivariate correlation) lies below 0.7. All variables included have a very significant influence on cluster formation.

3 Findings

3.1 Listening to music during leisure time

Listening to music is one of Austrians' favourite leisure time activities; over half (55%) of the population does this (almost) daily. Only television and reading play an even larger role in leisure time. However, this listening occurs as a secondary activity. But attentive listening also plays a significant role, taking place more often than e.g. hiking, walks, or sport. Almost half (47%) of all respondents listen to music attentively at least several times per week. Notable here is that both the under-30s and the over-60s attentively listen to music significantly more than all other age groups. Those in employment or busy with family apparently find less time to listen to music as they would like. Leaving one's cosy home to do so, however, is a relatively rare event. Only very few (7%) go to concerts at least several times a month; a good third (36%) at least several times a year, but over a quarter of the population (28%) never go to musical performances at all. Austrians who relatively often go to concerts tend to be those of higher education.

3.2 How long people listen to music per day

Music listening as a secondary activity can occur for many hours, as it requires comparatively little attention or effort. Almost half (46%) do this for more than two hours in a normal day, and almost nine out of ten Austrians (86%) for more than half an hour per day. As one would expect, attentive listening receives less time: still 7% of respondents listen attentively to music for more than two hours per day, although most (51%) do this for less than half an hour. Music listening duration in a normal day – whether as a secondary activity or attentively – is completely independent of all social-demographic characteristics, including even age.

3.3 In what social settings people prefer to listen to music

Most Austrians, more than two thirds of respondents, prefer to listen to music alone. The remaining third is split equally into "as a couple", "with a few other people" and "as part of a large audience". The social-demographic characteristics of age and education have no influence over the preferred social setting to hear music.

3.4 How much music people own

Around half (53%) of respondents own at least 50 original recordings on physical music media. One fifth (19%) possess the equivalent number of mp3 tunes, i.e. at least 500. Possession of music is not a given: 11% of respondents do not possess a single original recording, and 57% not one mp3 tune. The size of respondents' physical music media collection gives no clue as to the size of their mp3 collection, although those without any music media at all also tend not to possess any mp3 music. School-leavers have considerably fewer original recordings than graduates. No significant link was observed between age and possession of music.

3.5 Which devices people use to listen to music

The principal means of listening to music in Austria is still radio: 91% of respondents use it at least sometimes. Televisions (49%) and CD players (56%) also rank highly. Mp3 players, computers and mobile phones still play a secondary role in the population as a whole (as at 2009!). Use of these newer media is very much a question of age: the under- and over-30s are very different here (fig. 2). Graduates listen to CD players strikingly often, school-leavers strikingly seldom.

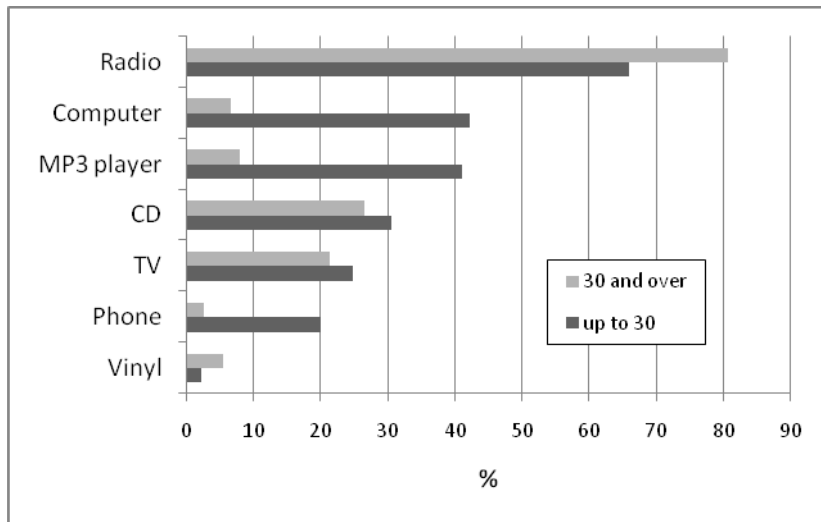


Figure 2: Devices often used for music listening

It is interesting to note that education level has almost no influence on readiness to use new media to listen to music, with the possible exception of older people of high education, who are less open to new media. While mp3 players and computers play a greater role in urban areas than in remote areas, this cannot be determined for mobile phones. Inadequate mobile network coverage seems not (any longer) to be a problem in Austria.

3.6 The role of the internet in accessing music

Over half (52%) of Austrians never use the internet to listen to music. Unsurprisingly the under-30s hold back less here too. In looking for information on music, listening and sharing the "digital natives" are the pioneers. Only in buying are they just as uninterested as older people (fig. 3).

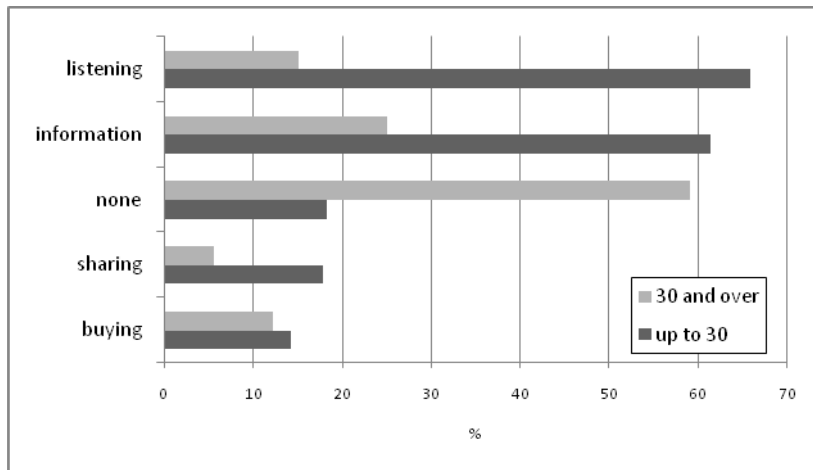


Figure 3: Internet use

Finding out about music on the internet is also a question of education level, particularly clearly in the 50-69 age group (44% graduates vs. 5% school-leavers). A similar ratio applies to 30 to 49-year-olds as regards listening to music via internet. However in the largest internet user group, the under-30s, the general affinity with the internet is so strong that the effect of education level disappears. Education level also plays no role in music sharing, which is almost only practised by the young.

The more internet-minded gave "social community sites" as their preferred music service on the internet. More than two thirds (68%) use such networks; among the under-30s this is as high as 84%. Preferences for other services are largely unaffected by age: 14% use streaming, 22% paid downloads, and 38% file-sharing sites.

The use of social networking sites is clearly related to the size of the place of residence (the bigger the town, the more these sites are used). Streaming services are generally not yet very widely used, in remote areas they are almost never used by the less-educated, and little more by those with higher education. In rural areas, the over-30s practically never buy music over the internet.

A change in music-listening behaviour thanks to the new possibilities offered by the internet is strongly connected to age. Half of under-30s now listen to more music with the advent of mp3 through the internet, as opposed to only one in five of older people. No significant connection was observed between education and internet use for music.

But "technically-competent" people of middle age (30-50) – who are mostly highly-educated, very mobile and live in cities – use new media almost as often as younger people. For this question we split the age groups even further (14-19, 20-29, 30-39, 40-49, 50+), as it is clear that use of new technology is very dependent on age. Sitting in front of a computer (as a leisure activity!) every day goes from 67% of teenagers, through 40% of 40-49 year-olds, to 29% of over-50s. In all age groups women do this much less frequently. The effect of age is even clearer in the use of computers for listening to music, for mp3 players it is similar, and mobile phones are used for music almost exclusively by teenagers.

Using the internet to get information about music shows a somewhat different pattern. Age also has a strong influence here (69-58-35-33-17%), but women are just as strongly represented as men. Only in the over-40s do we see significant gender differences. There is also very little gender difference when listening to music over the internet. Purchasing music over the internet is equally rare across all age groups up to 50, and both genders. Social networking sites are liked equally by men and women up to 40, with gender differences appearing only after 40. They are generally used very much less with increasing age (84-59-28-22-8%). Streaming services are generally not yet very widely used, and their use strongly depends on gender, with women using them only half as often as men. File-sharing services are less used by women; their use decreases moderately with age (40-27-12-18-7%). This is probably the reason why women own considerably less mp3 music. We can say that women do not so often tend to be "early adopters" of new technologies. However, they use the established features of the internet almost as often as men.

The powerful influence of education is striking in advanced internet use by the middle-aged. Whilst people of all educational levels use mp3

players and computers equally, and gather information from the internet (school-leavers do this slightly less), those with the Austrian "Matura" (higher school certificate normally required for university entry) mostly listen to and buy their music over the internet. This applies to an even greater extent to graduates.

3.7 Preferred music styles

To research Austrians' music preferences, an open question was used to elicit spontaneous information.⁸ Most (47%) answered – either by naming or excluding – by referring to music *styles*. From painstakingly-listed details on other particulars (musicians' names, pieces of music) to the panoply of styles reflected in Austria's radio and concert scene⁹, the following ranking emerged: Austrians' favourite music comes from the very "Austrian" field of *Volksmusik/Schlager* (18%). Well behind, but certainly ahead of all others, comes the style of *Album Oriented Rock* (15%). At some distance come *Adult Contemporary* and *Classical Music*, both with 10%. Last in this quintet of best-loved music styles in Austria comes *Contemporary Hit Radio* (9%). All other styles are much less popular, although the largest single group comprises those with *no* music preference, nearly one in five. Music tastes in Austria are generally very much age-related. Older Austrians prefer *Volksmusik*, *Schlager* and *Adult Contemporary*, while the younger group favours *Album Oriented Rock* (35%), *Contemporary Hit Radio* (16%), *Urban Contemporary* (13%) and *Techno/House* (11%) (fig. 4).

⁸ The question used was "When you are asked about your favourite music, what is the first answer that comes into your head?"

⁹ The common international radio formats are considered here; however, they could not be investigated as such, as the specialist terms applied to them are largely unknown. We therefore use the term "Oldies" for "Adult Contemporary (AC)", and "aktuelle Hitparaden-Musik" for "Contemporary Hit Radio (CHR)". "Album Oriented Rock (AOR)" is here "Rockmusik abseits der Hitparaden", and we called Urban Contemporary "HipHop/Black Music".

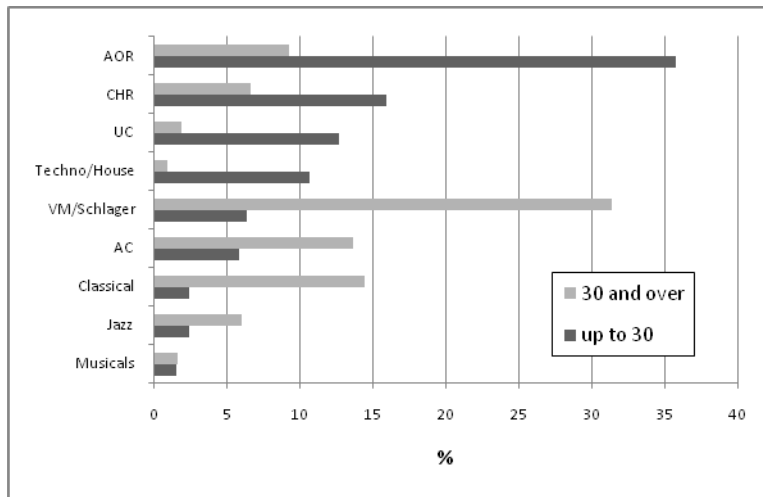


Figure 4: Favourite music style

Education also plays a major role, and certainly not the one described in the "omnivorousness" findings of Richard Peterson (1992). The probability of someone preferring *Classical Music* increases in clear proportion to educational level. The exact opposite applies to an even greater extent to *Schlager/Volksmusik*. *Album Oriented Rock* is very clearly favoured by those with the Austrian "*Matura*". This preference is significantly stronger than among those with higher or indeed lower educational levels. The number of graduates showing a preference for specific music styles such as *Urban Contemporary* or *Techno/House* is vanishingly small. Within the under-30s group education level shows a clear influence in that those with the *Matura* have an even stronger preference for *Album Oriented Rock* (49%), whilst the school-leavers' favourites are rather *Techno/House* (24%) and *Contemporary Hit Radio* (22%).

3.8 Musical performances attended, and how often

From another perspective, preferences for particular styles of music are very specifically indicated by whether one attends live performances of

that music style. The actual choice of music offered regionally is also taken into account; these regional offerings do not always give one the chance to go to live concerts of one's own favourite music, especially in remoter alpine areas of Austria. The type of music event most often attended in Austria is therefore disco/clubbing, with almost half (45%) of respondents recalling going to such an event during the previous twelve months. Other favourites are brass band and pop/rock concerts (both around 40%). While going to musicals or jazz concerts is scarcely influenced by age, disco/clubbing or pop/rock concerts are very clearly the territory of the young, and *Volksmusik* performances attract principally older audiences. Among the over-60s, pop/rock concerts, discos and jazz performances are strikingly less popular than other music events. Apart from jazz and musical shows, performance attendances among the 50-59 and the 60+ age groups show strong similarities, and again differ greatly from those of younger generations. Education once again strongly influences attendance frequency in general, and particularly the type of performances attended. The higher the level of education, the more often one visits classical music concerts, opera or jazz concerts. The number of events attended increases with educational level for all music styles, with the notable exception of *Volksmusik*.

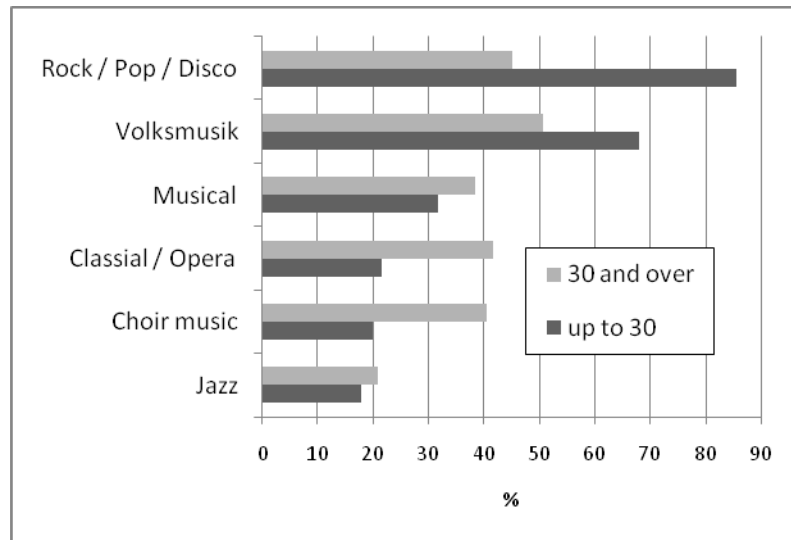


Figure 5: Attended events

3.9 How much money people spend on music

Four in ten Austrians spend absolutely no money on music. Those who spend money tend to "invest" in performances rather than music media, and certainly not in mp3 tunes. At the time of the survey (2009) six out of seven respondents did not spend any money on music downloads; around one in ten (9%) spent this amount on music media, but almost nobody did on downloads (2%). Generally speaking, willingness to spend money on music has no connection to the age of respondents. Education does play a role, to the extent that school-leavers spend significantly less on music events than the higher-educated. Music media collectors are again characterised by comparatively higher levels of education (and income).

3.10 What people want from music

By far the most important function of music for Austrians is its recreational value. For more than half (55%) of respondents it is very important that music should enable relaxation. Music as a means of expressing one's personality is also mentioned, above all by the under-30s. Also, the younger one is, the more important it is that music should connect one to one's friends. No significant link was observed between education and expectations from music.

3.11 Who sings and makes music, and how often

Finally, peoples own musical activities in "Music Country Austria" were investigated. Significantly more than half (58%) sing to themselves (at least sometimes), and almost a third (32%) sing with others. One in five never sings. Age and education play no appreciable role here, although women sing much more than men. Higher levels of education carry a considerably higher chance that a musical instrument has been learned. Not even a quarter (24%) of school-leavers has learned an instrument, but over two thirds (67%) of graduates have.

3.12 The Austrian music listener typology

Listener typologies have strengths and weaknesses, and in constructing them we run the risk of either oversimplifying them for the sake of impact, or making them too complex. The listener types presented below were developed with the help of a cluster analysis; they can be considered a counter to the listener types in the literature, which are sometimes out-of-date, and/or have been constructed using less-than-comprehensible methods. The aim of such a typology is not to develop new ideas for presenting hypotheses, as would be the case with ideal types. Nor is it to develop new, independent variables better able to predict, which may be a goal of lifestyle research. Rather, it is nothing more than a description of characteristics which come together in the typical groups. The groups described here allow a simplified, alternative presentation of the dependencies of different variables to form a com-

prehensible whole. For this it is essential to recognise that a preference for specific music styles often goes hand-in-hand with specific social-demographic factors, with preferences for certain music media, and with firm expectations from music. Constructing listener types via a cluster analysis aims to bring groups together which are as homogenous as possible within the group, and as heterogeneous as possible between the groups. Although a certain level of respondent detail is lost in this way, the deciding features for the questions can be better worked out. The most obvious advantage in investigating new patterns of musical behaviour in the internet age is the identification of a special population segment – "Generation Web 2.0"– which is the very embodiment of these new behaviours. By creating original names for listener types one achieves clear definitions, although under certain circumstances there may be an impression of undue simplification. It goes without saying that there are grey areas here, and a member of the music lovers type can certainly also be a highbrow, but in case of doubt they will always fit better in the first group. Here are the listener types (fig. 6):

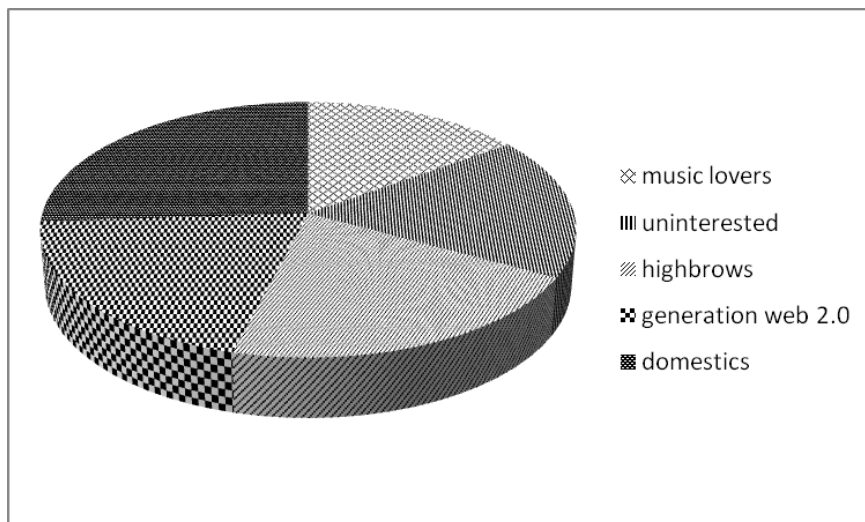


Figure 6: Austrian music listener typology

Thus in Austria we have five more-or-less equal-sized groups of music listeners, with the following characteristics:

3.12.1 Music lovers

This group sees all music in a more positive light than the average. In particular world music, musicals, CHR and AOR are more positively rated. These people often go to concerts, listen attentively to music most often, and see music as an indispensable part of their lives. They sing a great deal, and very often also play an instrument. They use all music media more often than the other groups, particularly new media rather than radio. All of the functions of music are of above-average importance to them, especially a rhythm they can dance to, connection with friends, and expression of personality. This cluster, at 15% of the 1,042, is the smallest. Members of this group are relatively young, with an average age of 39.

3.12.2 Uninterested

If this group has any preference at all, it is for Volksmusik/Schlager or Oldies; other music tends to be eschewed, in particular world music und AOR. But neither affirmation nor rejection can be said to be strong, as there is simply insufficient basic interest in music to lead to rejection as such. They are particularly inactive and uninterested in music, rarely listen to it attentively, spend very little money on it, and seldom go to concerts. They also almost never play music or sing. Radio is the preferred medium, and this is the only area in which this group fits the average for the population. All other ways of listening to music are very seldom used, particularly CDs, and they are far below the average in their use of new media. This group attaches no importance to music's functions, certainly not expression of emotions or personality, or connection with friends, which all lie well below the average. This cluster represents 18% of respondents, and their average age is 49, although the age range is in fact huge. Education level is relatively low, with a remarkably high proportion of people who never reached their Matura.

There are more men than women in this group, mainly in the 30-50 age group.

3.12.3 Highbrows

These are the typical connoisseurs of high culture. They prefer classical music and jazz, and strongly reject Volksmusik/Schlager as well as techno/house. They often go to concerts, most often listen attentively to music, and see music as an indispensable part of their lives. They spend a great deal of money on music performances and original recordings. They play music themselves more often than all other groups here. They use new media rather rarely, but will particularly often play CDs or vinyl records. Their evaluation of music's functions is less extreme than in either of the above mentioned groups, with emotional expression being seen as much more important than rhythm or connection with friends. This group covers 21% of respondents, the average age is 48, and the education level is the highest on average. All age groups can be found here, although somewhat more often the older groups. There are more women than men in the 30-50 age group, but over 50 men most clearly tend to fit in the cluster.

3.12.4 Generation Web 2.0

Members of this cluster love techno/house, UC and AOR, and they strongly reject Volksmusik/Schlager and Oldies. Their levels of activity and interest are average, as is the amount of money they spend on music, and their musicality. As for their openness to new media, however, they are above the average, frequently using computers, mp3 players and mobile phones for music, but also CDs and television. They use radio and vinyl records only very rarely. Personal and emotional expression and connection with friends are somewhat more important here; otherwise the group is average. 20% of respondents are in this group, and as regards the variables used to construct the clusters, they are the least homogenous. Mean age is 27, and the spread is the narrowest of all groups. The group represents 57% of under-30s and 26% of 30 to 39-

year-olds (an above-average number of whom have a higher education level). There are few over-40s.

3.12.5 Domestics

This group loves to listen to Volksmusik/Schlager, and also likes Oldies. "Younger" music styles such as techno/house, UC and AOR are looked down upon. They seldom go to concerts or buy original recordings; their attentive music listening and their own music playing are at average levels. They listen to radio very often, and hardly ever use either new media or CDs. All functions of music are considered important here, particularly the rhythm, lyrics, the connection with friends, and that the music be played by exceptional musicians. This group, with 26% of respondents, is the biggest and most homogeneous as regards the variables used to construct the cluster. The average age is 55, and the education level is the lowest of all groups. The proportions of each age group increases with age, from 6% of 30-year-olds to 49% of the over-60s. Graduates account for far below 10%, and a very large proportion have no Matura. People living in the countryside are over-represented here just as much as those with low incomes.

4 Summary

To sum up, we can say that in Austria a higher level of education has a great effect on one's preoccupation with music. The more highly-educated go to more concerts, buy more music media and listen correspondingly more often to music on a CD player. They clearly prefer classical music and jazz, both recorded and live. They invest significantly more money in their music and are relatively likely to have received musical training. Age plays a role chiefly to the extent that younger Austrians listen to music attentively relatively often, and intensively use newer devices such as computers or mobile phones. They are power-users of the internet as a medium for gathering information about music, and for exchanging and directly listening to it. Young people's preoccupation with music in general has been greatly boosted by internet use.

Under-30s turn their backs on Volksmusik, preferring pop, rock and electronic music, both recorded and in live concerts. They don't just value "their" music as a means of relaxation, but – much more than older people – they also consider it important to be able to express their personality (individuality) and connect with their friends via music. What is striking is how clearly a population segment stands out which could never have been identified before the digital music revolution: the "Generation Web 2.0". Although this group's style preferences are very similar to the under-30s (as defined purely by age), it cannot be limited to these. There are also young people in the "music lovers" and "uninterested" groups. Along with their socio-structural inhomogeneity, what really distinguishes "Generation Web 2.0" is their idea of when, how, where and with which devices music is listened to. Or as Prensky (2001, p.1) says: "*their thinking patterns have changed*". Their approach to music is playful, short-term, social, very visual and mobile. They like their music to be uncomplicated, convenient and inexpensive. Music suppliers who grasp this and build it into their product offer will get this group's attention. There is still too little concrete understanding of how to manage this. Above all there is a lack of qualitative research as to why these people listen to music, and what they expect from it. Or is this just the thinking of a "Digital Immigrant"? Whatever the case may be, this generation deserves attention as it will influence the future of the music business, even though most revenue today is still generated by the traditional routes of original recording sales and concert tickets.

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