



A Deep Dive into the Psyche of Singaporean Music Listeners

Understanding what our listeners look out for
and how to reach out to them

How was the research conducted?

In 2021, NAC commissioned a multi-pronged study that included

12



In-Depth
Interviews, Diaries

6



Focus Group
Discussions*

500



Quantitative
Online Surveys

*8 respondents per focus group

Who did we interview?

Five different listener profiles between the ages of 18 to 44 years old



The Reserved SG Music Lover

- 🎵 Has the strongest appreciation of SG music
- 🎵 Spends more time at home relaxing/ attends events on their own

The Extroverted SG Music Enthusiast

- 🎵 Sociable and trendy
- 🎵 Finds SG music easily available and identifiable

The Avid Individualist

- 🎵 Has the strongest interest in music, and seeks novelty and inspiration
- 🎵 Finds SG music easily available but not as valuable

The Casual Listener

- 🎵 Least concerned about relationship with others in their lives
- 🎵 Finds SG music identifiable but not easily available

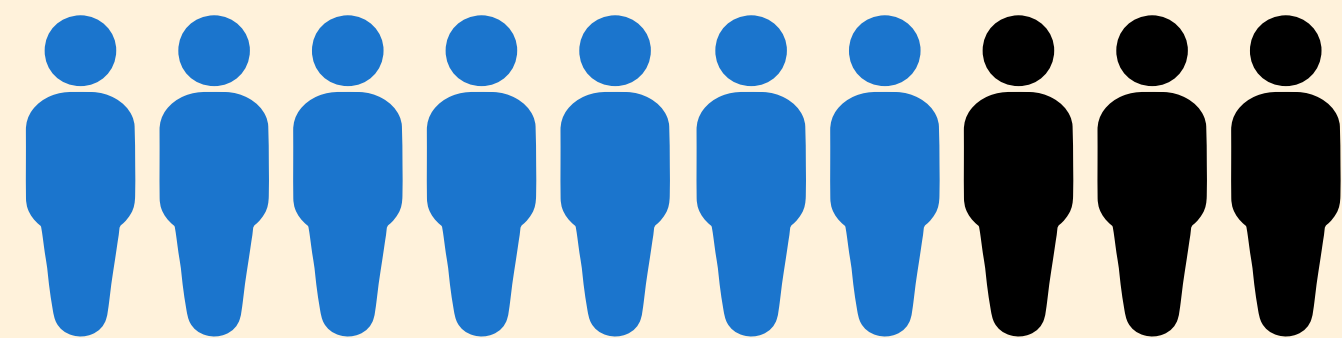
The Unexposed

- 🎵 Physically active, and craves new experiences, hobbies, and cultural inspiration
- 🎵 Finds SG music valuable but not easily available

Good news!

Most Singaporeans are open to listening to homegrown music

Across various playlists* of homegrown music, **75%** of listeners were interested to continue listening after hearing part of it.



Even among Singaporeans who were not fans of homegrown music (i.e. Avid Individualists, Casual Listeners, and Unexposed), **7 out of 10** listeners are interested in these playlists.

Most are supportive of efforts to encourage and boost awareness of homegrown music, especially the following profiles:



- Avid Individualists, Casual Listeners and The Unexposed
 - Those between 25 to 44 years old

*Study had tested Singaporeans' response to over 15 playlists that varied by genre and mood/occasion.

What do Singaporeans love about homegrown music/artists?



Evokes **strong familiarity**
and **fond memories**

“ I would say that SG music is grounded. The use of Singlish in lyrics like ‘lah’ brings in our local context which Singaporeans can easily relate to and understand. ”

18-24 yrs,
Avid Individualists

Brought about **a sense of pride** when a Singaporean breaks out on the **international music scene**

“ I listen to Singaporean musicians because they make me feel proud. Whenever I see them on shows in China, they are representing Singapore. We seldom see people who dare to pursue a music career. ”

35-44 yrs,
Extroverted Music Enthusiasts, Male

Recognises how the homegrown music scene has **evolved** and **want to see it continue to grow**

“ Talent wise not much of a difference compared to overseas artists. I think some of our Singaporean talents are quite ‘up there’ as well. ”

18-24 yrs,
Reserved Music Lover, Male



But why are some Singaporeans not supportive of homegrown music?

Lack 'meaningfulness' of songs

“ American or UK music has a lot of slice-of-life kind of things that they can talk about, basically hardships. I feel Singapore doesn't have too many hardships to really put it into a song. ”

18-24 yrs, Extroverted Music Enthusiasts, Female

Struggling industry

“ It's because Singapore has a stronger emphasis on academic excellence and economic growth rather than social values and the arts. ”

25-34 yrs, Avid Individualists

Lack of variety and quality

“ Singaporean music is not popular and catchy enough. Not everyone would love the music, it's an acquired taste. ”

-24 yrs, Extroverted Music Enthusiast, Female





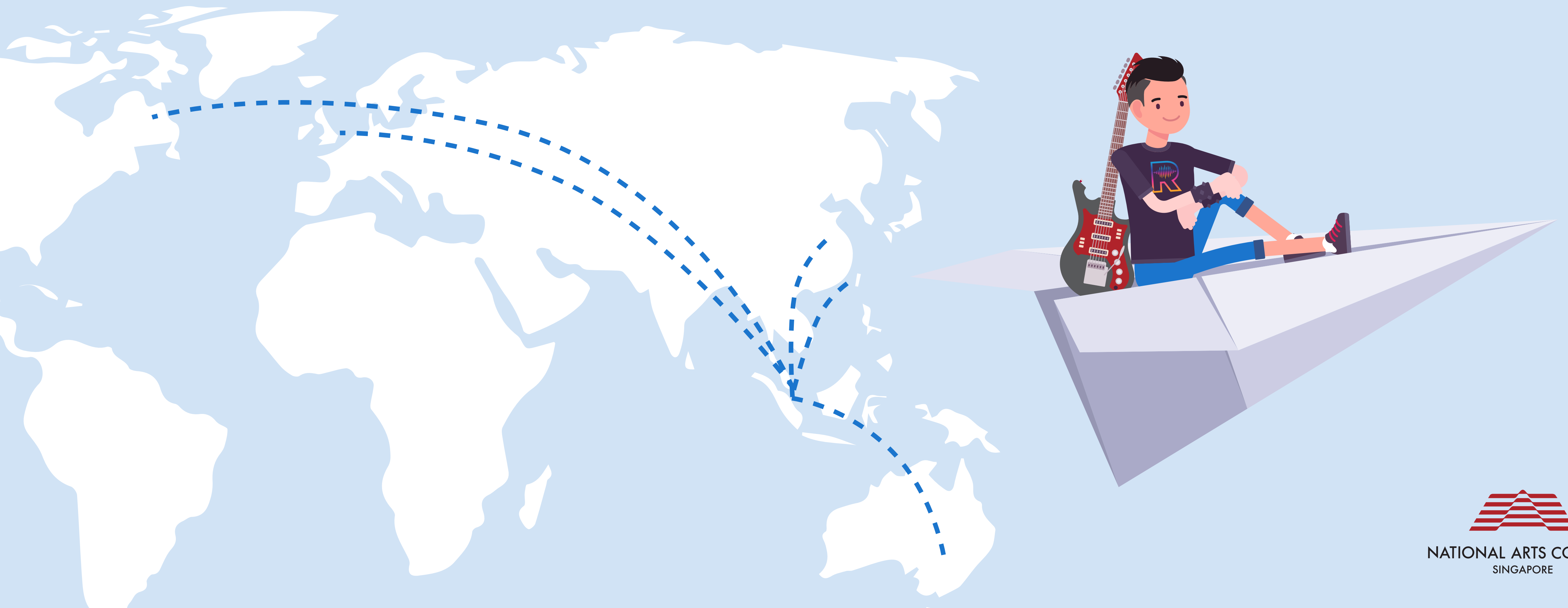
Singaporeans are not familiar with our music acts

**Most people could only recall
JJ Lin and Stefanie Sun as Singaporean artists**

Only some younger listeners could identify newer
homegrown acts



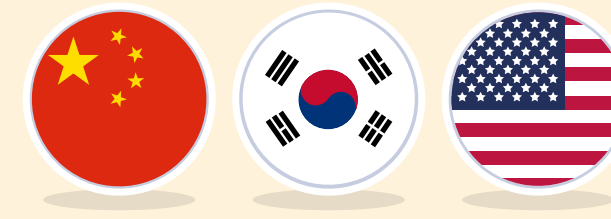
Singaporeans tend to recognise homegrown musicians only after they have achieved overseas success





Listeners are spoilt for choice!

- Singaporean listeners are already listening to a wide selection of international artists especially from China, South Korea and the USA



- Ease of access to international music through online media platforms such as Spotify, YouTube Music, Netflix, Disney+



- Original soundtracks of foreign dramas resonate with Singaporean listeners, even though they do not understand the language
- Only 26% (approx. 1 in 4) of recommended playlists ever get noticed

Singaporeans do not actively seek out homegrown music

Discovery is usually by chance

Oh! He's a Singaporean artist!

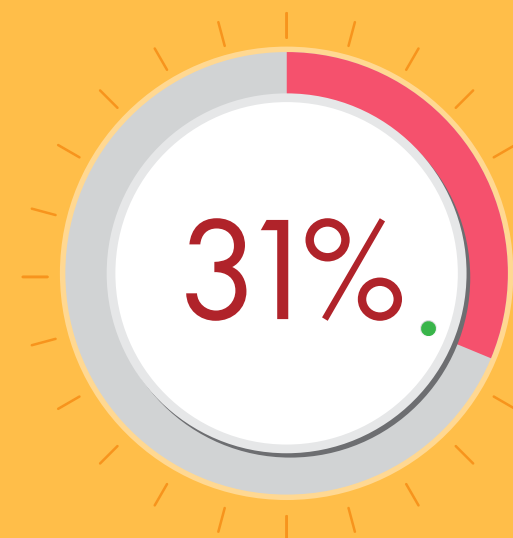
But there's a silver lining!

After sampling various Singaporean playlists,



of music listeners had an improved perception towards homegrown music

- **55%** felt more pride towards local music
- **51%** found homegrown music to be more unique than previously thought
- **48%** found homegrown music to have more variety than previously thought
- **44%** found that homegrown music had more international appeal than previously thought



of Singaporeans who were not fans of homegrown music appreciated it more

- Reserved SG Music Lover: **67%**
- Extroverted SG Music Enthusiast: **55%**
- Casual Listener and The Unexposed: **32%**
- Avid Individualist: **30%**

Main reasons for improved perception:

"Variety" and **"Uniqueness"**

% indicate the level of interest by Singaporeans who participated in the study



How can we get more Singaporeans interested in homegrown music?

Give them more opportunities to listen to homegrown music!

Create playlists that Singaporeans can use for a variety of occasions, such as mood-lifting playlists for:

- When they are feeling down (54%)
- When they are bored (47%)
- When they want to focus while studying or at work (41%)



Caution in using Singlish and Singaporean references!
While it adds a unique local flavour and relevance, it may limit global acceptance.



When designing SG playlists, avoid mixing of genres and languages.

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Help Singaporeans encounter more homegrown artists through performances



Musicians can share more about themselves through podcasts and livestreams (40%) by introducing who they are and their music (39%) and what inspires them (44%).

% indicate the level of interest/consumption by Singaporeans who participated in the study

How to get more Singaporeans interested in homegrown music?

Types of music discovery channels:



YouTube (85%)



Spotify (60%)



Radio (51%)



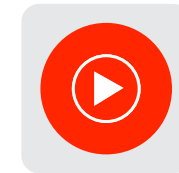
TV shows / movies / video games / musicals (46%)



Instagram (46%)



Facebook (44%)



YouTube Music (41%)



Hearing from friends / family (38%)



Tik Tok (33%)

Consider tapping on channels such as YouTube, YouTube Music, and Spotify to promote local music: **96% of music discovery came from these channels!**

Rising trend: Instagram and Tik Tok gaining traction among younger listeners!

Top 3 touchpoints in YouTube:

- Homepage recommendations (51%)
- Auto-play from music searched (27%)
- Album playlists from liked artists (26%)

Top 3 touchpoints in Spotify:

- Charts (37%)
- Recommended songs after a playlist ends (28%)
- Discover Weekly (27%)



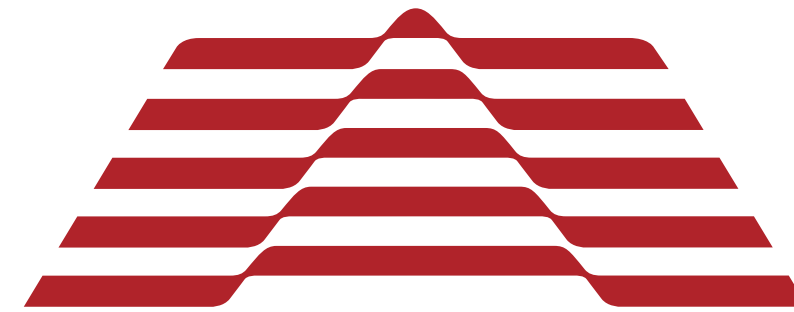
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For more information, please reach out to NAC's Music team.

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