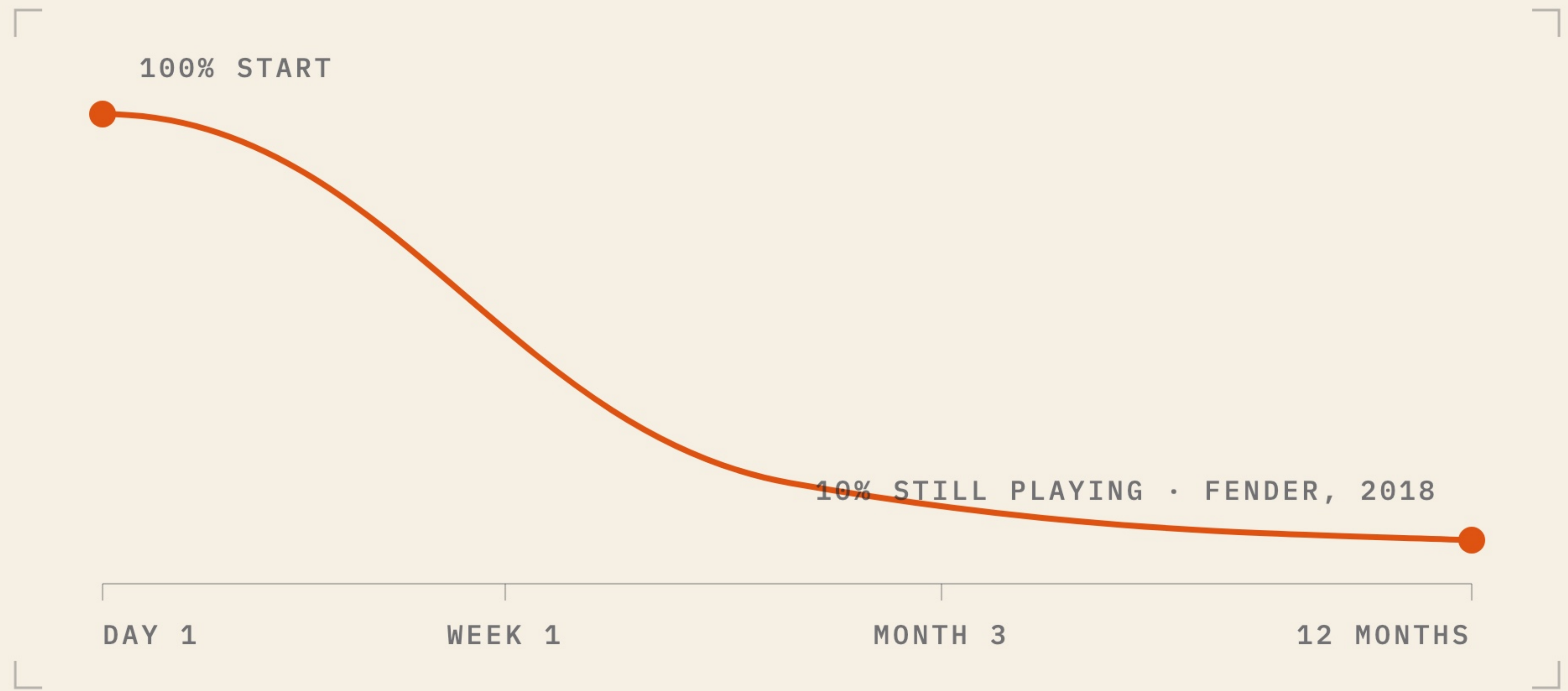


THE PROMISE MAP

What the industry promises beginners. What actually happens.

- “in minutes”
- “from day one”
- “in 30 days”



THE PROMISES, QUOTED VERBATIM: SLIDE 3. WHAT THE DATA SAYS HAPPENS NEXT: SLIDES 4 TO 10.

Every beginner is sold a timeline.

In minutes. From day one. In 30 days. I collected the promises the industry makes to beginners, then went looking for what actually happens to them.

HOUSE RULES OF THIS MAP

- 01 Promises quoted verbatim from each platform's own pages, checked live this week**
- 02 Outcomes only from primary data: peer reviewed, registry, or a company's own disclosure**
- 03 Vendor statistics labelled as vendor statistics**
- 04 Every figure older than 2024 shows its year**
- 05 Estimates labelled as estimates**

What they promise.

“Get set up in just two minutes and start playing your first songs straight away.”

FLOWKEY • FLOWKEY.COM

“Personalized 5-Min Workouts ensuring you progress fast and always succeed”

SIMPLY PIANO • APP STORE LISTING

“Play songs from day one”

SIMPLY GUITAR • HELLOSIMPLY.COM

“Begin playing in a few short lessons with learning, practice and feedback activities.”

FENDER PLAY • APP STORE LISTING

“5 Days To Playing Piano”

PIANOTE • PIANOTE.COM

“30-Day Independence”

DRUMEO • DRUMEO.COM

“Learn to Solo In An Hour”

GUITAREO • GUITAREO.COM

“Improve your skills in just 10 minutes a day.”

SINGEO • SINGEO.COM

“Play your favorite songs from day one”

HDPIANO • HDPIANO.COM

“In a recent survey, members reported learning 50-100% FASTER than with other guitar apps!”

GUITAR TRICKS • APP STORE LISTING

“...learn the fretboard fast, in just 5 minutes a day.”

JUSTINGUITAR • APP STORE LISTING

“Just 10 minutes a day can lead to serious improvement.”

MELODICS • APP STORE LISTING

14 OF 20 PLATFORMS CHECKED PROMISE SPEED ON THEIR OWN PAGES OR STORE LISTINGS. 4 MAKE NO SUCH PROMISE, YOUSICIAN AMONG THEM. 2 COULD NOT BE REACHED. CHECKED 16 SEPTEMBER 2026. QUOTED VERBATIM.

90%

of first-time players abandon the guitar within 12 months. The number the whole industry runs on.

WHERE IT COMES FROM

A 2015 internal Fender finding, made public by its CEO in 2018. “We found more than 90 percent of first-time players abandoned guitar in 12 months.”

HOW IT WAS HEDGED

In the same sentence: “if not the first 90 days”. No 90-day dataset was ever published. Bloggers turned the aside into a statistic.

WHAT WAS PUBLISHED

No methodology. No sample. Ever.

WHAT IT WAS FOR

A sales argument: the 10% who stay are worth \$10,000 each; ten more points of retention would add \$1 billion a year. Mooney's math, 2019.

The industry's foundational statistic is a vendor's funnel argument. That does not make it wrong. It makes it unverified.

FENDER PRESS RELEASE 2018

MUSICRADAR INTERVIEW 2019

Half quit as teenagers. Most adults have stopped.

50%

of students drop out of music lessons and other musical activities by age 17

PLOS ONE 2021 • 3,303 STUDENTS, UK AND GERMANY

85%

of sixth-grade band students are gone by senior year

TEXAS PEIMS VIA BYO 2018 • 1998 TO 2005 COHORT

43%

of adults actively make music, against 86% of children

ABRSM MAKING MUSIC, UK 2021

–20%

adults playing an instrument, 2014 to 2020

ABRSM MAKING MUSIC, UK 2021

And the regret is real: 55% of the people who quit electric guitar wish they hadn't. (YouGov, 3,000 US adults, 2022)

The loudest retention bet never reported its result.

2015	Fender finds 90% of first-timers abandon within 12 months (internal)
2017	Fender Play launches to fix it
2019	103,000 paying subscribers. About 110,000 before COVID.
2020	Free 90-day promo: about 930,000 subscribers at the peak. Its Songs app is shut after 7 months, in the middle of the surge.
2021 TO 2025	No paying-subscriber figure is disclosed again.
2025	Moody's and S&P downgrade Fender. Leverage heading towards 8x.
2026	The CEO who made the bet retires. The APAC president takes over.

Six years on, nobody outside Fender knows whether the number moved. The absence is the finding.

YAHOO FINANCE 2019

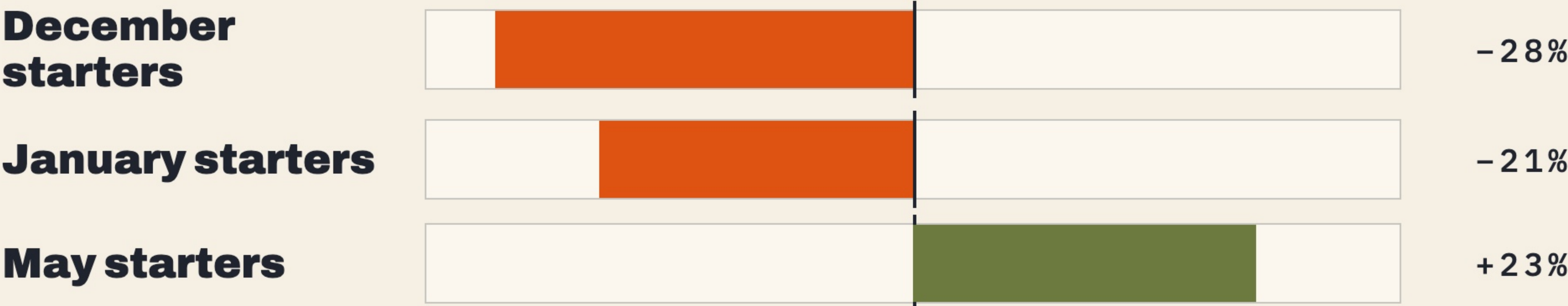
FORBES 2022

S&P, MOODY'S 2025

FENDER 2026

The subscription model monetizes January intentions.

SIX-MONTH RETENTION VS THE APP'S OWN AVERAGE, BY STARTING MONTH



SKOOVE X DATAPULSE RESEARCH, 1,137,446 USERS, 2026 • A PIANO APP PUBLISHING ITS OWN NUMBERS

58% first weekly renewal in education apps, the highest of any category

59 to 66% of the plan mix is annual, paid up front

~30% of annual-plan cancellations happen in month one

~5% of churned annual subscribers ever come back

REVENUECAT STATE OF SUBSCRIPTION APPS 2026 • 115,000+ APPS

A year of payment, collected at peak motivation. The user's failure is priced in.

Of 20 platforms checked, zero publish a learner outcome.

WHAT THEY PUBLISH

Downloads: a tuner with 180 million of them

Ratings and stars

“Users”: 20 million monthly, tuner included

Subscribers, when it flatters: 100,000+

Valuations: \$1 billion, 2021

WHAT NOBODY PUBLISHES

How many learners still play after 12 months

How many reach their first song

Retention by starting month

What happens when the promise runs out

Whether the promise was ever true

CHECKED 16 SEPTEMBER 2026, 20 PLATFORMS, OWN PAGES AND STORE LISTINGS. CLOSEST THING FOUND: ONE APP'S OWN SURVEY SAYING MEMBERS LEARN “50-100% FASTER THAN WITH OTHER GUITAR APPS”. A SPEED COMPARISON, NOT AN OUTCOME.

The industry measures acquisition. Retention is nobody's KPI, so it is everybody's cost.

- GUITARTUNA 2026
- YOUSICIAN 2026
- GLOBE & MAIL 2025
- NOCAMELS 2021

Four reasons the evidence supports.

1**Cost**

71% of music teachers say lesson cost is a barrier. 25% of children and 18% of adults who never played say cost was the reason.

ABRSM, UK 2021

2**Nobody at home plays**

The strongest predictor of sticking with music is a musical home environment, not talent or lesson type.

PLOS ONE 2021

3**The calendar**

Resolution starters stick 21 to 28% worse than average. The industry's biggest month produces its weakest cohorts.

SKOOVE X DATAPULSE 2026

4**The expectation**

A promise of minutes meets a skill of months. The platforms that sell speed do not publish what happens when the speed stops.

THIS MAP'S READING, NOT A MEASUREMENT

Three are measured. The fourth is the one the industry could fix tomorrow.

The first year is the biggest unpriced asset in music.

THE VENDOR'S OWN MATH

One million new guitar entrants a year in English-speaking countries. 100,000 commit. Each is worth about \$10,000 over a lifetime. Ten more points of retention: an extra \$1 billion a year. Fender CEO, 2019

THE QUITTERS WANTED TO STAY

55% of people who quit electric guitar regret it. 51% for guitar, 48% for piano. YouGov, 2022

WHO GAINS FROM A BEGINNER WHO STAYS

The instrument maker: the committed player buys five to seven guitars and multiple amps. Fender, 2019

WHO OWNS THE TOOL THAT DECIDES IT

Someone else. Of the big brands, only Casio and Donner build their own learning software. The rest rent. Map 1, 2026

The company with the most to gain from the first year does not own the tool that decides it.

Three things this map says.

1 Speed is the wrong promise. The first year is the product.

2 Retention is nobody's KPI, so it is everybody's cost.

3 Whoever is paid to keep a beginner playing owns the next decade of this industry.

Number three is where I am building.

Learning to play should not be intimidating.

That's the problem I build against at Upbeat Studio: Drum Coach, 200,000+ drummers across 180+ countries.

NEXT MAP • OCTOBER The micro-app flood: every music learning tool launched in the last 18 months, and who is behind it.

CORRECTIONS Welcome, and credited. This map improves in public.