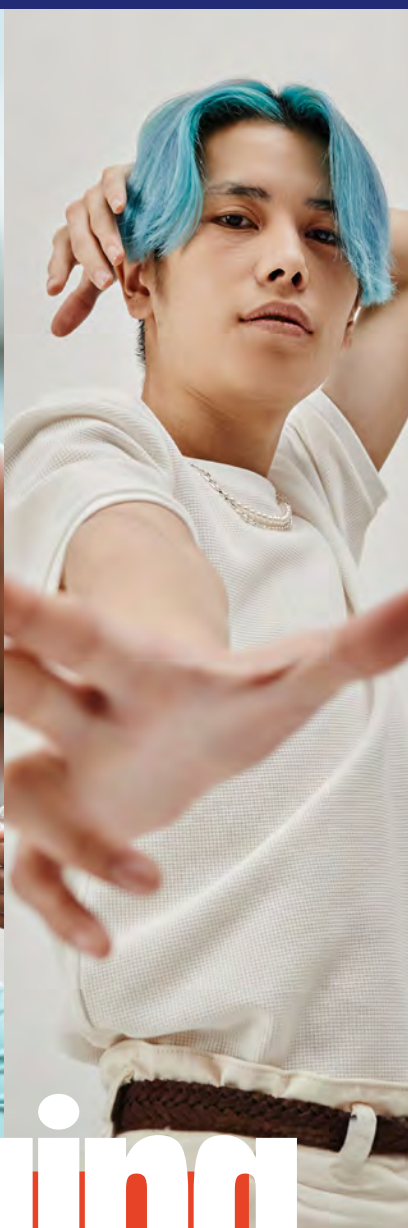


ifpi | representing the
recording industry
worldwide



Engaging with music



2023



About IFPI
IFPI is the voice of the recording industry worldwide, representing over 8,000 record company members across the globe. We work to promote the value of record music, campaign for the rights of record producers and expand the commercial uses of record music around the world.

Insight and Analysis
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METHODOLOGY

IFPI's *Engaging with Music 2023* explores the ways that people listen to, discover, and engage with music around the world. It is the largest music-focused consumer study worldwide.

The study was carried out amongst a demographically representative sample of the online population aged 16–64 in the following territories: Argentina, Australia, Brazil, Canada, France, Germany, Italy, Japan, Mexico, Netherlands, New Zealand, Poland, South Africa, South Korea, Spain, Sweden, UK and USA. The study was also conducted amongst a representative sample of 16–44-year-olds in China, India, Indonesia, Nigeria, Philippines, Saudi Arabia, UAE, and Vietnam. As in previous years, results from China and India are not included in 'global' figures cited in this report as the size of these countries would have a considerable impact on the weighted average figures used. Results from Indonesia, Nigeria, Philippines, Saudi Arabia, Vietnam, and UAE are not included in global figures to ensure long-term trending remains accurate. Case studies for all countries not included in the 'global' figures are provided at the end of this report.

In total, over 43,000 internet users were surveyed with higher numbers of respondents in larger markets. Varied samples of between 1,100 and 4,000 respondents per market were set in accordance with online population size and demographic structure, as determined by the latest census data in each territory. This ensured that a standard error of between +/- 1.55% to +/- 2.95% was achieved throughout the data at a 95% confidence level. Study design, construction, and analysis was conducted by IFPI with fieldwork organised by AudienceNet.

Totals for charts in this report may not add up to 100% where relevant because of rounding.

The 26 countries surveyed accounted for 91.2% of global recorded music market revenues in 2022.

Fieldwork took place between August and October 2023.

Introduction

***Engaging with Music* is the biggest study of its kind. A unique snapshot of how fans around the world — over 43,000 in 26 countries — discover, listen to, and engage with the music that is so integral to their lives.**

The report shines a light on how the work and energy of record companies and their industry partners has given artists more opportunities than ever to find audiences. It captures the ways in which this activity has been embraced by fans, who are discovering and engaging with more music in an increasing number of ways.

This year, for the first time in a report of this scale, we see global music fans giving their response to the new opportunities and threats brought by artificial intelligence to music. They express the huge value they place in the importance of human creativity and the belief that music should not be used to train AI systems without authorisation.

The powerful effect of music on our mental health and broader wellbeing is being increasingly recognised, and even prescribed in some countries. The 2023 report reminds us of just how much support music can give people in their lives.

We also see an increasing enthusiasm from fans for their own country's genres and artists, alongside pride and support when their "local" genres receive worldwide interest from today's streaming generation.

Music piracy is still very much an issue, with stream ripping and the use of illegal mobile apps among the leading causes for concern. This illegal activity has a severe and direct impact on royalties which should be returning to those investing in and creating music. We will continue to work with governments and the wider music industry to ensure the most secure digital environment possible for music creators and fans alike.

We hope you enjoy reading this 2023 report and the authoritative insights it provides on the diverse, dynamic, and incredibly exciting world of music.

Frances Moore
Chief Executive, IFPI

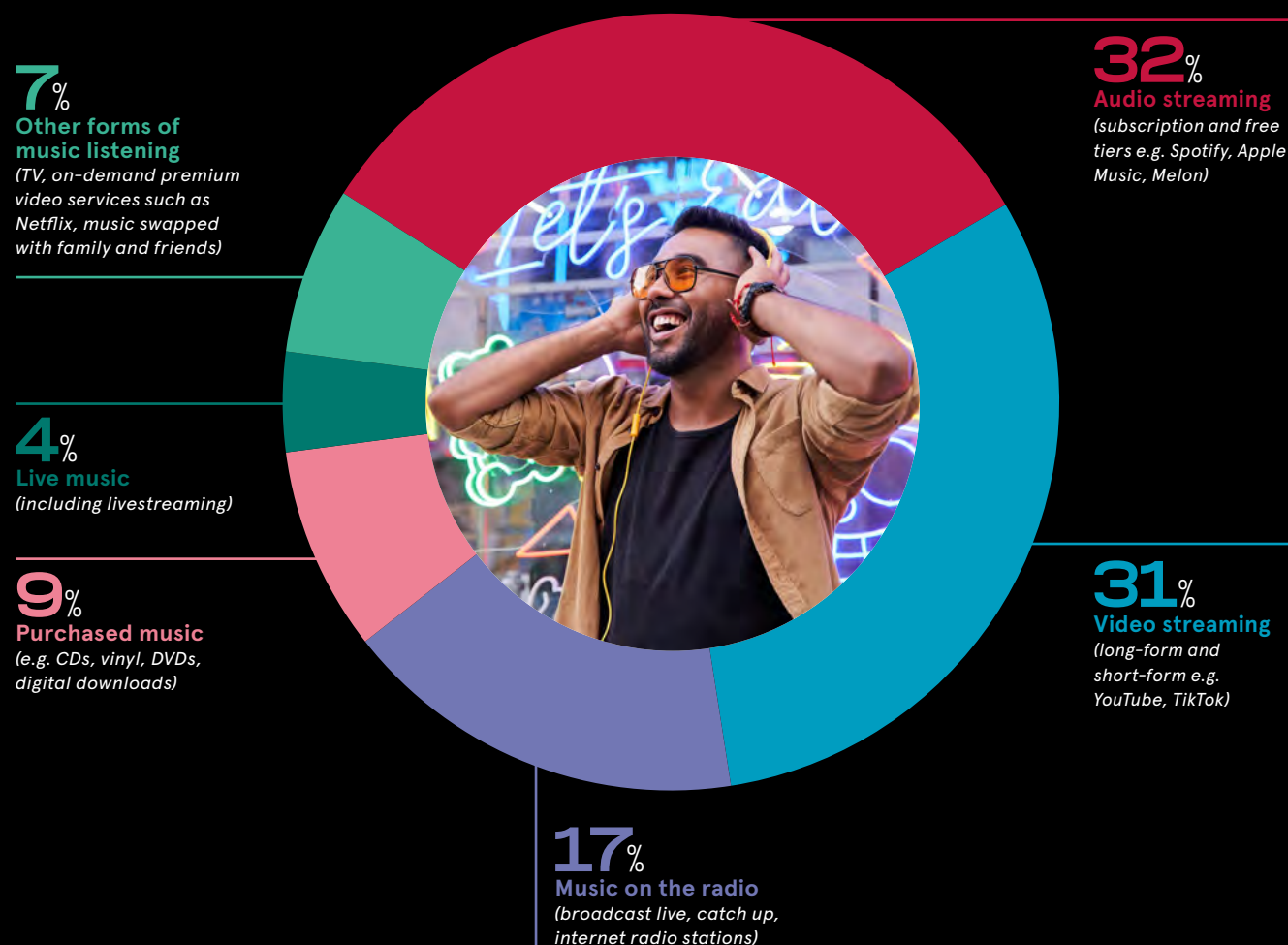


A global snapshot of music engagement in 2023

Based on the biggest piece of research of its kind – across 26 of the world's leading music markets – *Engaging with Music* is a global insight into the ways fans interact with music and the enormous role it plays in their lives.

THE MUSIC ENGAGEMENT MIX

How all the hours that people spend engaging with music break down between different methods.



IFPI ENGAGING WITH MUSIC 2023

Listening time based on core 18 countries



20.7 hours

TIME SPENT LISTENING TO MUSIC EACH WEEK (UP FROM 20.1 HOURS IN 2022)

THAT'S EQUIVALENT TO AN ADDITIONAL
13
3-minute songs per week in 2023

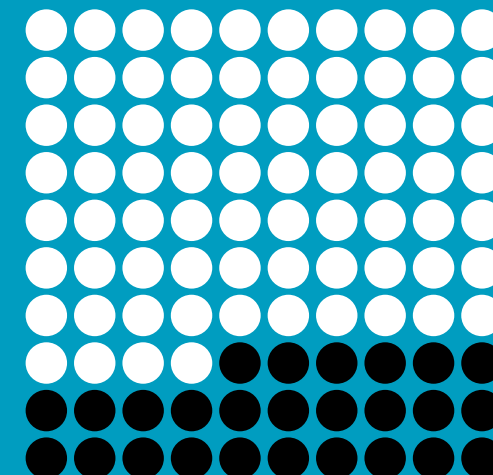
ON AVERAGE:

People use
7+
different methods to engage with music

People listen to
8+
different genres of music

48%

LISTEN TO MUSIC USING SUBSCRIPTION AUDIO STREAMING



74%

OF PEOPLE WITH AWARENESS OF AI'S MUSIC CAPABILITIES AGREE THAT AI SHOULD NOT BE USED TO CLONE OR IMPERSONATE ARTISTS WITHOUT AUTHORISATION

71%



OF PEOPLE SAY MUSIC IS IMPORTANT TO THEIR MENTAL HEALTH

57%



SAY IT IS IMPORTANT TO THEM THAT THEY CAN ACCESS MUSIC THAT COMES FROM ANYWHERE IN THE WORLD

29%



USE UNLICENSED OR ILLEGAL WAYS TO LISTEN TO OR OBTAIN MUSIC

Audio streaming continues to resonate

The global audio streaming market continues to grow, led by subscription audio streaming, allowing global audiences to access and discover great music.

THE TOP THREE REASONS

why people subscribe to a music streaming service focus on uninterrupted and on-demand access to the millions of licensed tracks available:

01 No adverts interrupting the music

02 I can listen to what I want when I want

03 Access to millions of songs

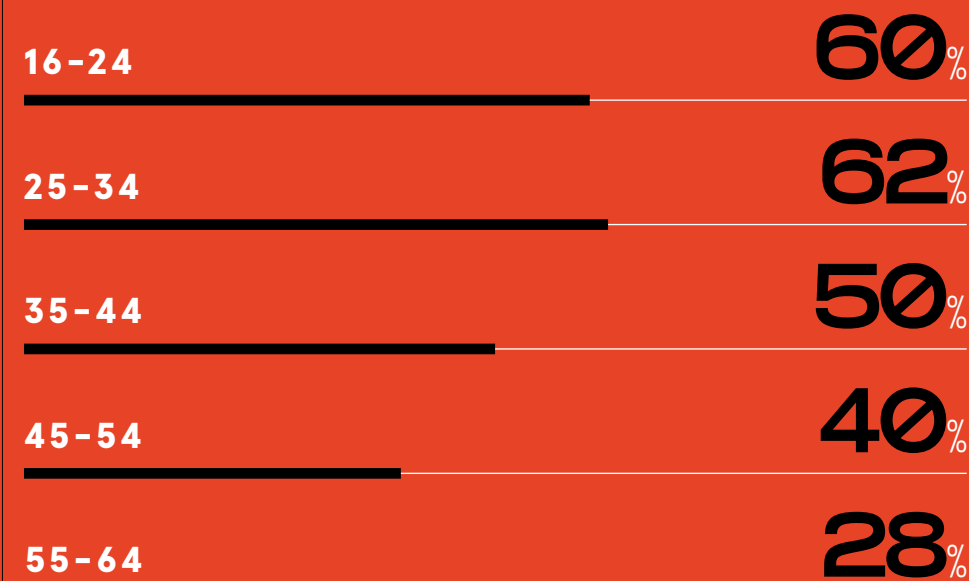
73%

of people say they listen to music through licensed audio streaming services (subscription and ad-supported)

+7%

growth in time spent listening to music on subscription audio streaming services, which reaffirms music fans' strong attraction to streaming

THE USE OF SUBSCRIPTION AUDIO STREAMING IS HIGHEST IN YOUNGER DEMOGRAPHICS:



(In the last month)

THE TOP 5 COUNTRIES MOST ENGAGED WITH PAID SUBSCRIPTION:

SWEDEN

61%

MEXICO

57%

GERMANY

55%

USA

53%

NEW ZEALAND

52%

(In the last month)

LISTENERS ARE ACTIVELY CHOOSING THE MUSIC THEY WANT TO LISTEN TO ON STREAMING SERVICES:

63%



Specific songs

57%



Specific artists

42%



Specific albums

59%



Own playlists

MUSIC FANS ENJOY THE ABILITY TO CHOOSE FROM THE MILLIONS OF LICENSED TRACKS AVAILABLE ON STREAMING SERVICES:

When I want to listen to a piece of music, I know I will be able to find it on the music services I use

70% agree

It is easy to listen to music wherever I am and whatever I am doing

73% agree

I am satisfied with the amount of recorded music available to me and how easily I can access it

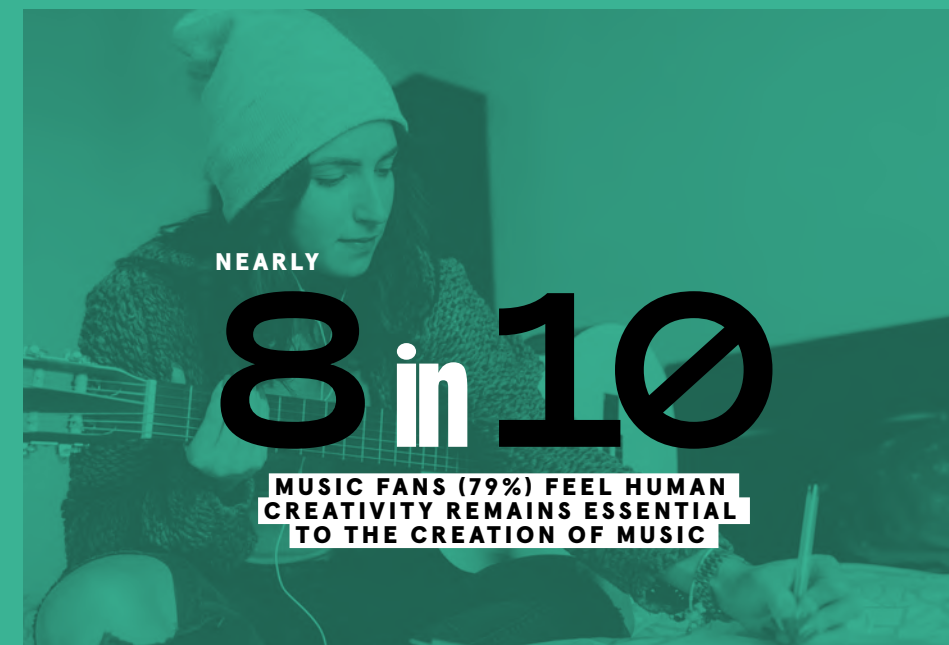
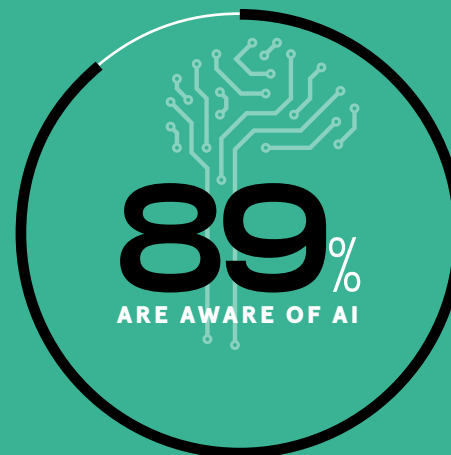
72% agree

Artificial intelligence enters the stage

For the first time in a research piece of this scale, fans around the world have given their views on AI in music.

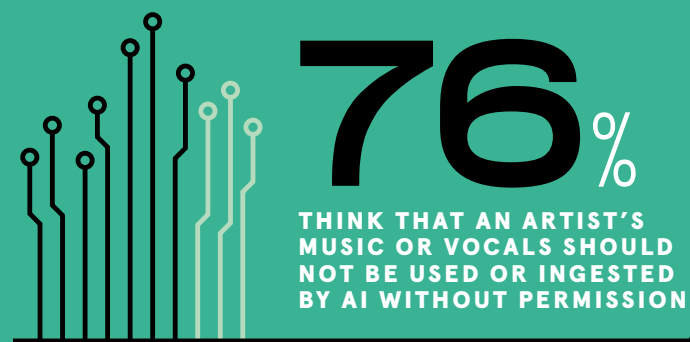
HIGH AWARENESS OF AI:

There is already good awareness of AI among music fans, with many using it and interested in its capabilities:



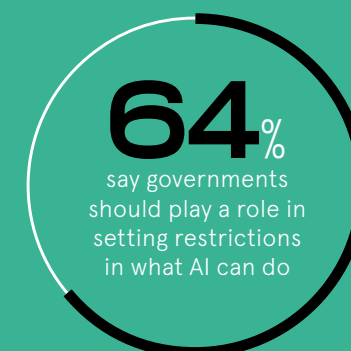
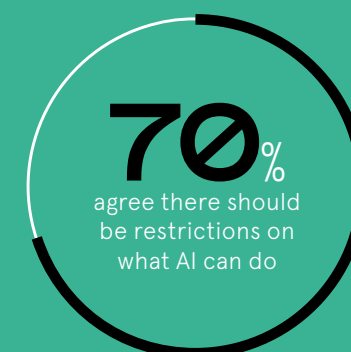
— For fans aware of AI's capabilities: —

AUTHORISATION FOR THE USE OF MUSIC IS SEEN AS EXTREMELY IMPORTANT:



74%
agree that AI should not be used
to clone or impersonate artists
without authorisation

FANS ALSO RECOGNISE THE NEED TO SET RULES FOR AI SYSTEMS:



AGREE THAT AN AI SYSTEM
SHOULD CLEARLY LIST ANY
MUSIC THAT IT HAS INGESTED
OR USED FOR TRAINING

At home, at work, at play — music soundtracks our lives

On average, people engage in 8 different activities while listening to music (rising to 12 among 16–24 year olds).

TOP INDIVIDUAL ACTIVITIES

People listen to music whilst engaging in a wide range of activities. Here are some of the most popular out of more than 40 different activities where music plays a part.

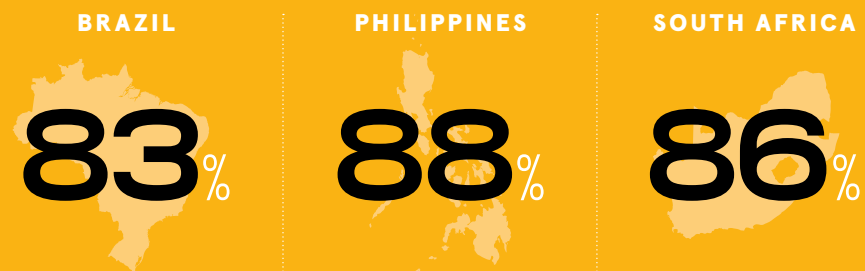


MUSIC PLAYS A CORE ROLE IN OUR MENTAL AND PHYSICAL WELL-BEING:

71% OF PEOPLE SAY MUSIC IS IMPORTANT TO THEIR MENTAL HEALTH



This is highest in:

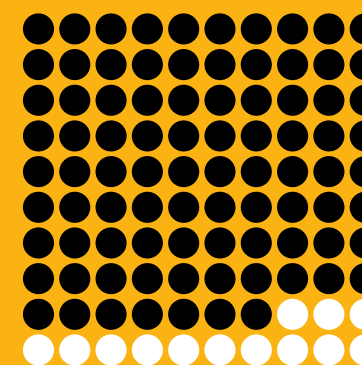


This is also particularly high among Millennials

74%

78%

SAY MUSIC HELPS THEM RELAX AND COPE WITH STRESS



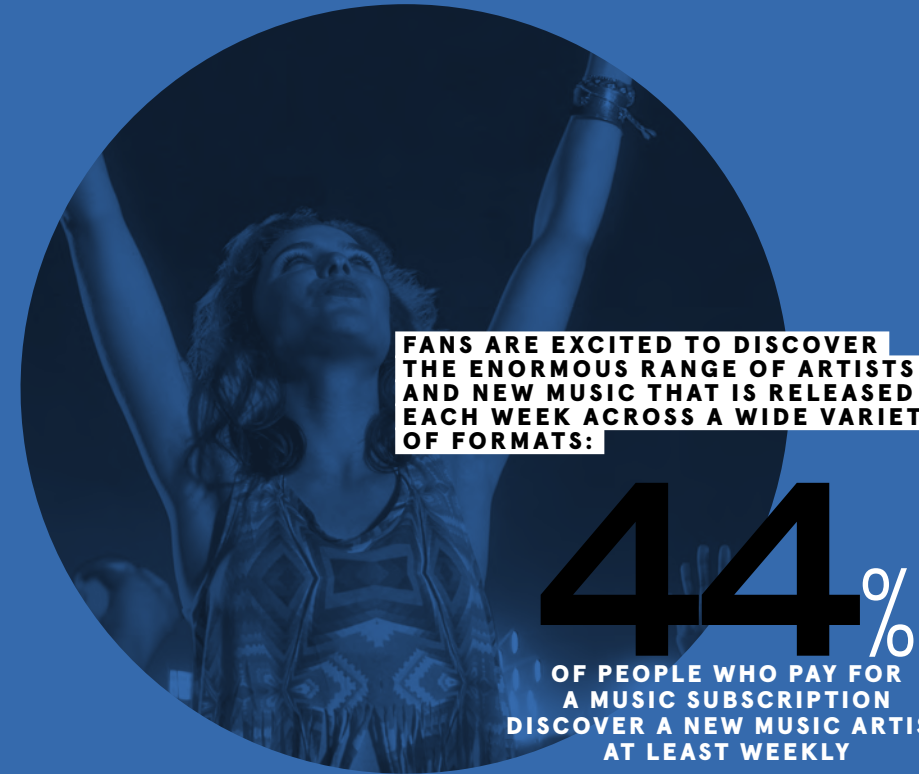
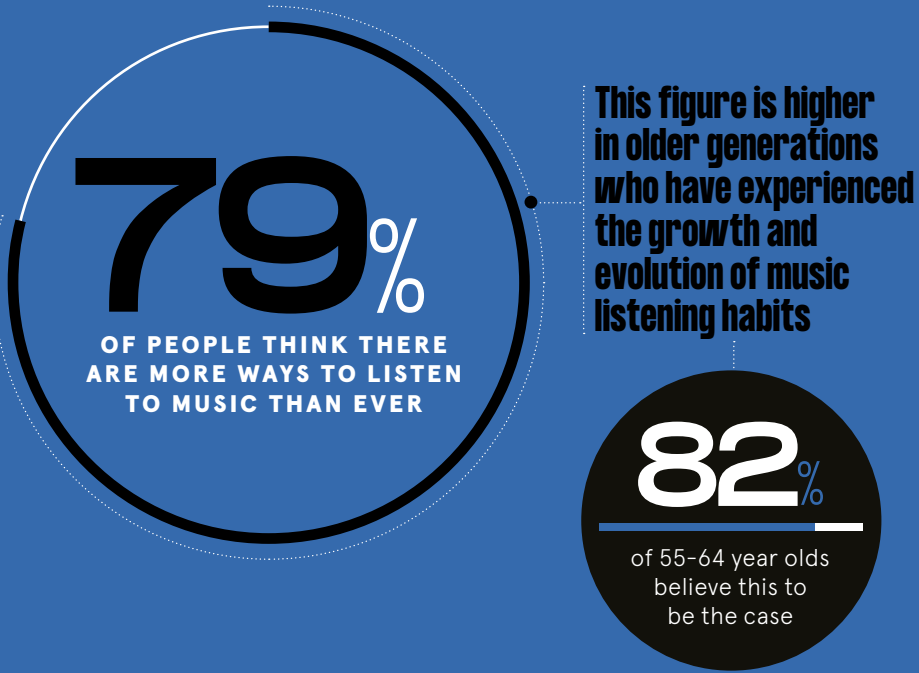
IF IN HOSPITAL AND IN PAIN

87%

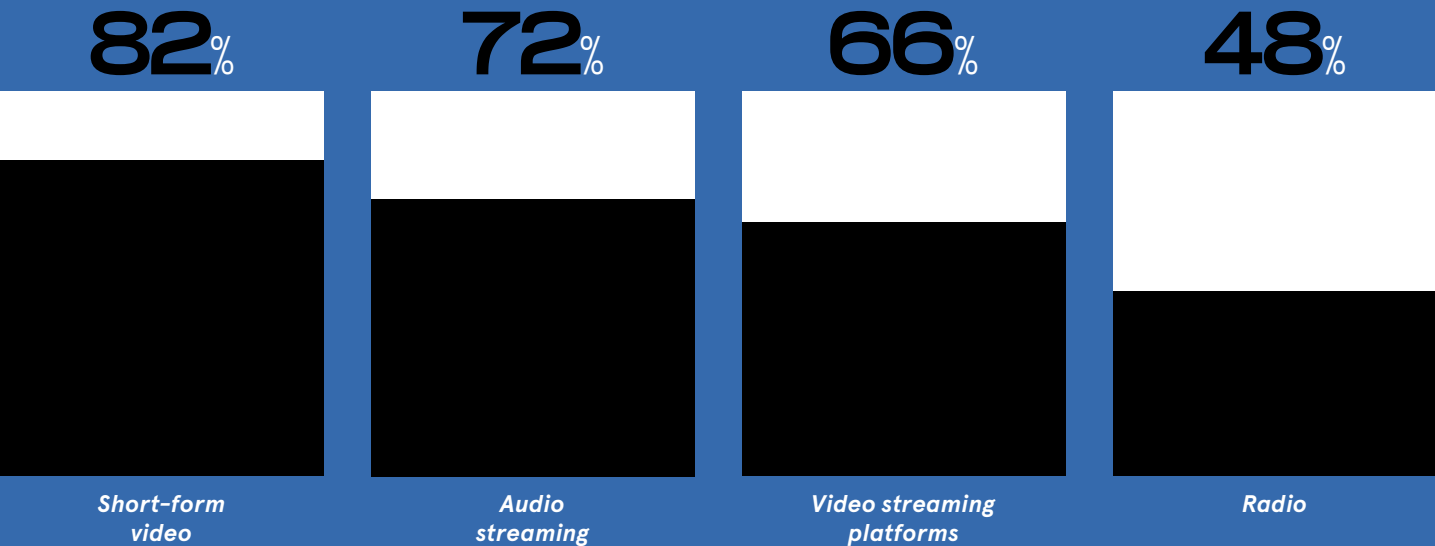
OF PEOPLE SAY THEY WOULD LIKE TO LISTEN TO MUSIC TO HELP THEM COPE

MUSIC FANS are engaging with music in more ways

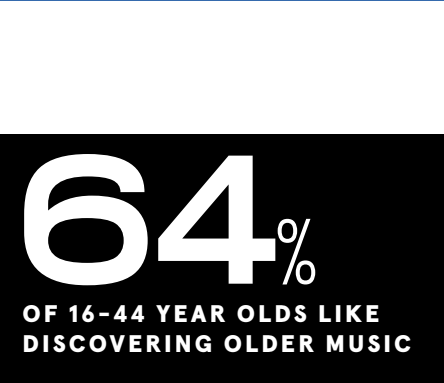
Fans are taking advantage of a growing number of ways to engage with music.



THE TOP FOUR WAYS IN WHICH 16-24S ENGAGE WITH MUSIC EVERY DAY:



FANS ARE ALSO DISCOVERING OLDER MUSIC THAT IS NEW TO THEM:



80%
of gamers listen to music while they play

54%
Music is central to 54% of all the time spent watching videos on short form video apps

36%
of people say they had watched a music livestream, such as a concert, in the last month

57%
of people have watched a music-focused TV show or film in the last month

The most popular genres around the world

Across 43,000 respondents in 26 countries, over 700 different genres were named by people as the music they typically listen to – including Accordion, Kannywood and Zarzuela – reflecting the rich and diverse music landscape fans now enjoy around the world.



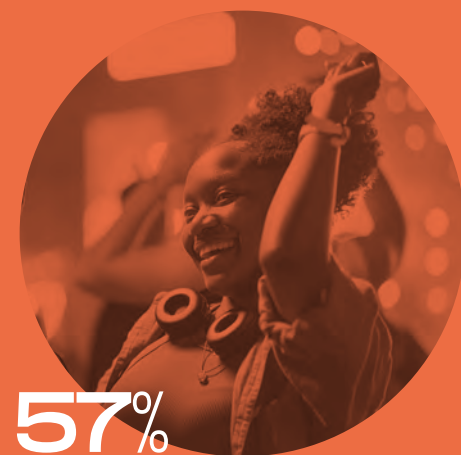
TOP 10 FAVOURITE GENRES GLOBALLY:

- 01 Pop
- 02 Rock
- 03 Hip-Hop / Rap
- 04 Dance / Electronic
- 05 Latin
- 06 R&B
- 07 Classical / Opera
- 08 Country
- 09 Soundtracks
- 10 Reggae

LOCAL GENRES ARE INCREASINGLY POPULAR IN COUNTRIES AROUND THE WORLD:

Below are percentages of music fans from different places who listen to the listed local genre.

BRAZIL	Sertanejo 40%
FRANCE	Variétés françaises 49%
ITALY	Italian pop 46%
JAPAN	J-pop 65%
NIGERIA	Afrobeats 64%
SOUTH AFRICA	Amapiano 42%
SOUTH KOREA	K-pop 61%
PHILIPPINES	OPM 61%
SAUDI ARABIA	Khaliji 37%



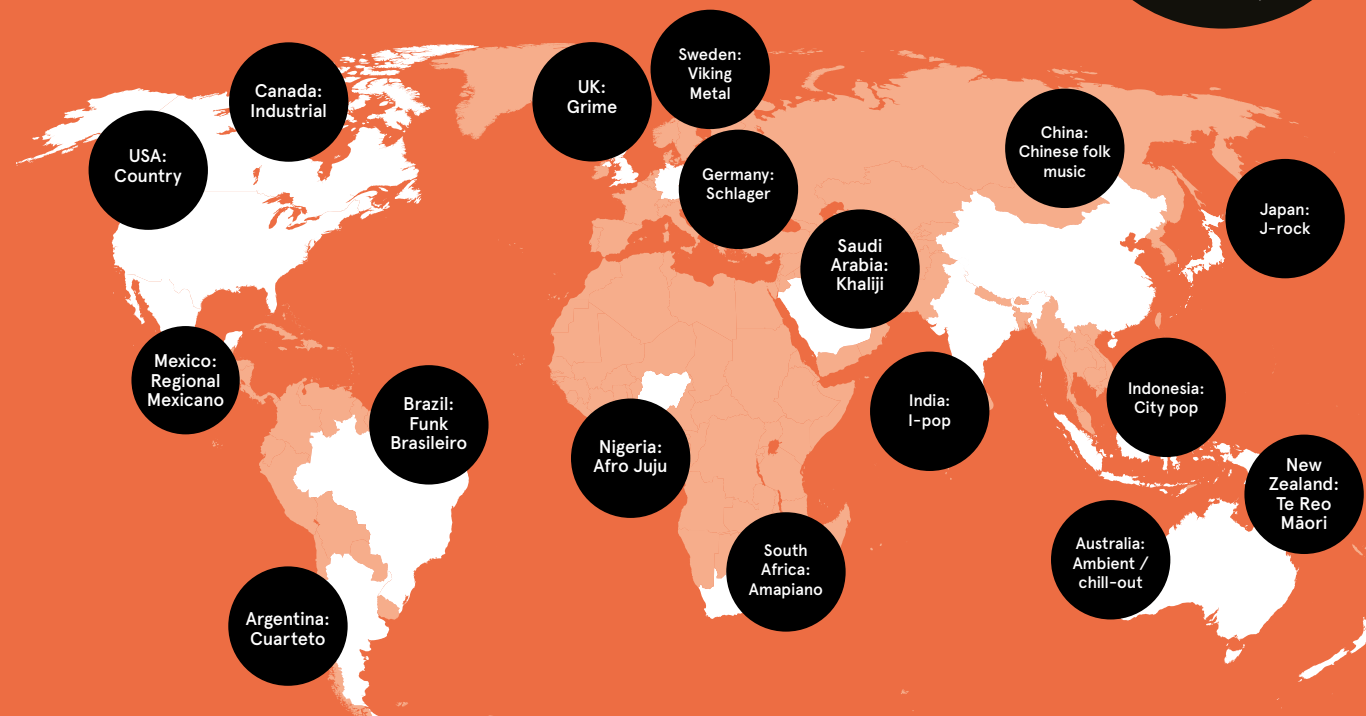
57%
say it is important that they can access music from anywhere in the world. Amongst 16–24s, it's 65%

52%
say music gives them a sense of social and cultural identity

55%
are proud when an artist from their country is globally successful

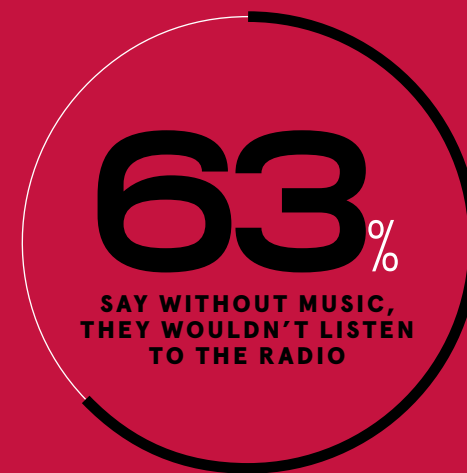
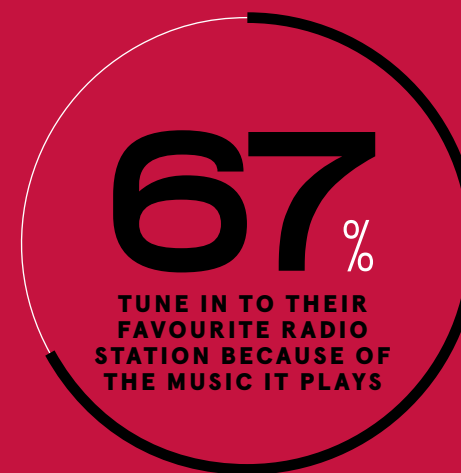


HERE ARE JUST SOME OF THE 700+ GENRES IDENTIFIED AS BEING ENJOYED BY MUSIC FANS ALL OVER THE WORLD:

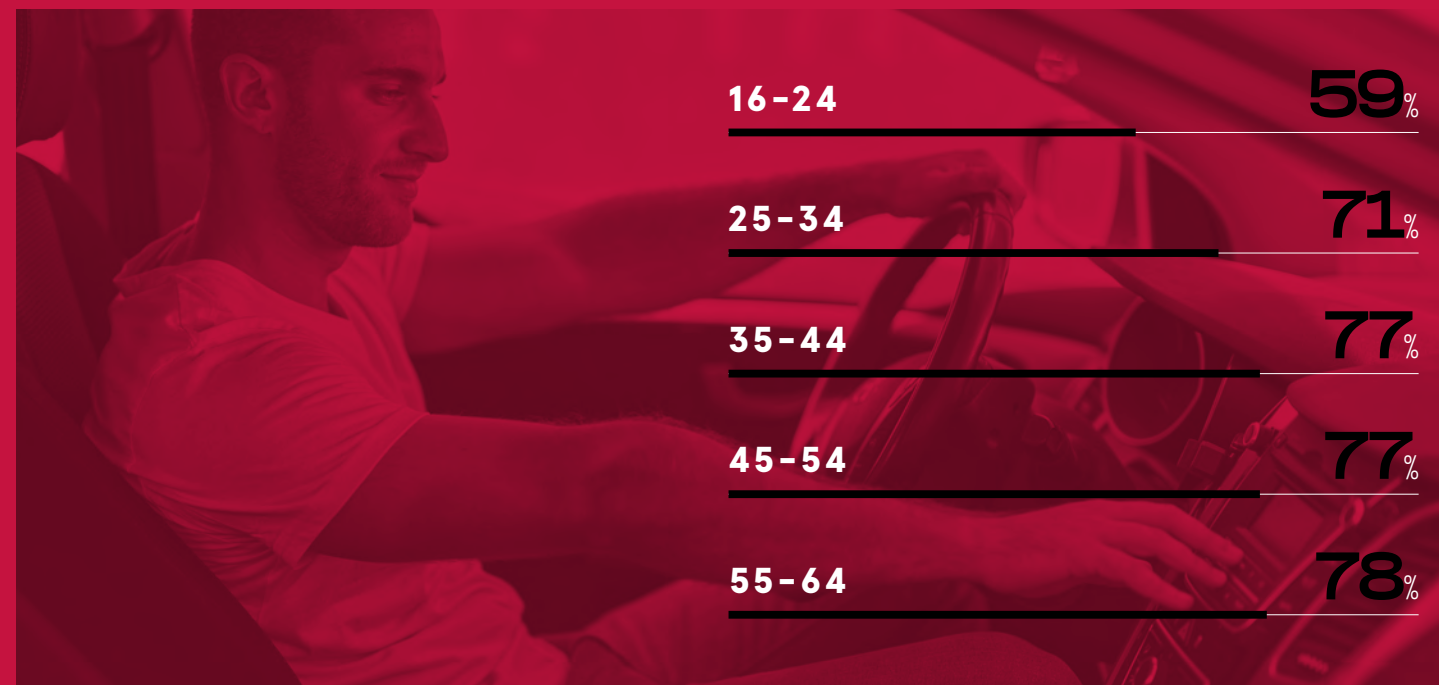


Radio and music

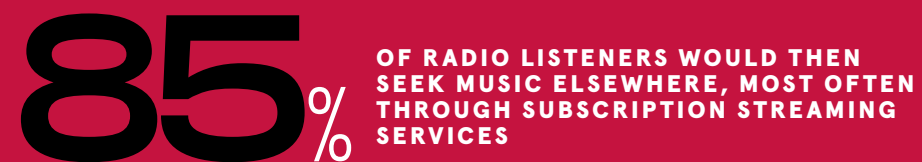
Music continues to drive the popularity of radio.



ALL AGE GROUPS REPORT STRONG ENGAGEMENT WITH RADIO:



IF MUSIC WASN'T ON THE RADIO:



RADIO LISTENING TIME BY DEVICE:



Fans still want to buy music

Demand for physical products remains strong.



PURCHASED A CD
IN THE LAST MONTH



PURCHASED VINYL
IN THE LAST MONTH



PURCHASED MUSIC
ON CASSETTE

THE MOST POPULAR GENRES AMONGST VINYL PURCHASERS ARE:



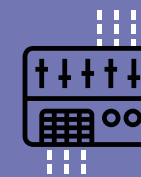
Pop



Hip-Hop /
Rap



Rock



Dance /
EDM



Classical /
Opera

THE MOST COMMON REASONS PEOPLE BUY VINYL ARE:

I like collecting vinyl records

24%

I like physically owning my own music

22%

I like the ritual of playing a vinyl record

19%

I like having the physical records to look at

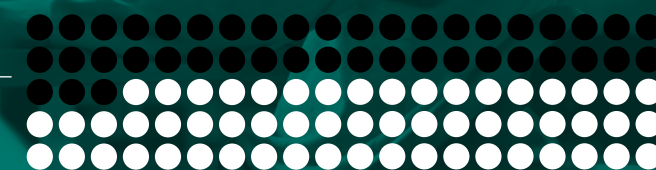
19%

Unlicensed music is still an issue

Unlicensed music continues to restrain a healthy music ecosystem, diverting fans away from those who invest in and create it. Almost 29% reported using illegal or unlicensed methods to download and listen to music.

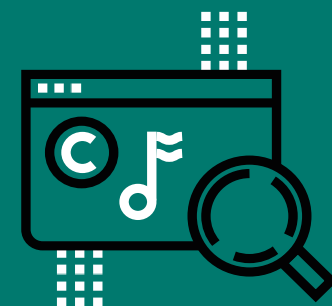
29%

USE COPYRIGHT INFRINGEMENT
AS A WAY TO LISTEN TO
OR OBTAIN MUSIC



43%

OF 16-24s



20%

USED AN UNLICENSED MOBILE APP
TO ILLEGALLY DOWNLOAD MUSIC

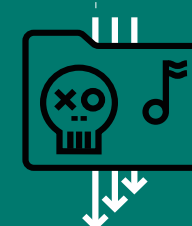
WHAT IS STREAM RIPPING?

Stream ripping is the illegal practice of creating a downloadable file from content that is available to stream online

IT IS NOW THE MOST PREVALENT FORM OF ONLINE MUSIC COPYRIGHT INFRINGEMENT

26%

USE STREAM RIPPING
SITES AS A WAY TO LISTEN
TO OR OBTAIN MUSIC



41%

OF 16-24s

55%

OF THOSE STREAM RIPPING
SAY THEY DOWNLOADED
MUSIC SO THEY WOULDN'T
HAVE TO PAY FOR A STREAMING
SUBSCRIPTION

COUNTRY FOCUS:

China

HOURS SPENT LISTENING TO MUSIC EACH WEEK:

27.9

Use licensed audio streaming

96%

Agree human creativity is essential in the creation of music

87%

Discover a new artist or music weekly

53%

Said music is important to their mental health

75%

Use unlicensed or illegal ways to listen to music

75%



TOP 10 GENRES

- 01 C-pop
- 02 Pop
- 03 Anime / Anisong
- 04 Classical / Opera
- 05 Cantonese / Guangdong Music
- 06 Soundtracks
- 07 Chinese Folk Music
- 08 Easy Listening
- 09 Dance / EDM
- 10 K-pop

COUNTRY FOCUS:

India

Use licensed audio streaming

94%

Agree human creativity is essential in the creation of music

84%

Discover a new artist or music weekly

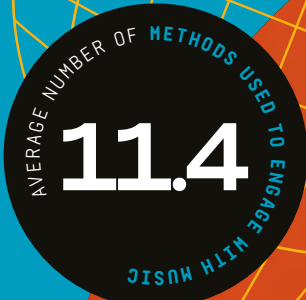
74%

Said music is important to their mental health

76%

Use unlicensed or illegal ways to listen to music

74%



HOURS SPENT LISTENING TO MUSIC EACH WEEK:

24.4

TOP 10 GENRES

- 01 Bollywood (modern)
- 02 Bollywood New Age (2000–2020)
- 03 Bollywood (classic)
- 04 Bollywood Coming of Age (80s, 90s)
- 05 Indian Pop
- 06 Hip-Hop / Rap
- 07 Dance / EDM
- 08 Bollywood Retro
- 09 Punjabi
- 10 Religious Music



COUNTRY FOCUS:

Indonesia



HOURS SPENT LISTENING TO MUSIC EACH WEEK:

28.3

Use licensed audio streaming

89%

Agree human creativity is essential in the creation of music

87%

Said music is important to their mental health

74%

Use unlicensed or illegal ways to listen to music

66%



TOP 10 GENRES



- 01 Pop
- 02 K-pop
- 03 Religious Music
- 04 Indonesian City Pop
- 05 Hip-Hop / Rap
- 06 Dangdut
- 07 Dance / EDM
- 08 Rock
- 09 Jazz
- 10 Acoustic

COUNTRY FOCUS:

Nigeria

Use licensed audio streaming

93%

Agree human creativity is essential in the creation of music

94%

Discover a new artist or music weekly

62%

Said music is important to their mental health

86%

Use unlicensed or illegal ways to listen to music

76%



HOURS SPENT LISTENING TO MUSIC EACH WEEK:

31.1



TOP 10 GENRES



- 01 Hip-Hop
- 02 Afrobeats
- 03 Gospel
- 04 Pop
- 05 Christian Music
- 06 Amapiano
- 07 R&B
- 08 African
- 09 Blues
- 10 Reggae

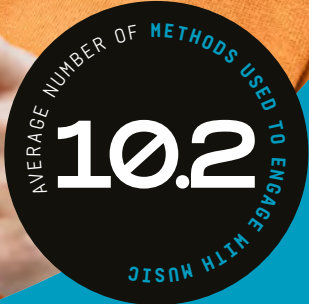
COUNTRY FOCUS:

Philippines

HOURS SPENT LISTENING TO MUSIC EACH WEEK:

28.3

Use licensed audio streaming	88%
Agree human creativity is essential in the creation of music	89%
Said that music helps them relax and cope with stress	90%
Said music is important to their mental health	88%
Use unlicensed or illegal ways to listen to music	62%



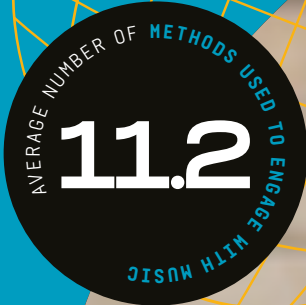
TOP 10 GENRES

- 01 Pop
- 02 OPM
- 03 Acoustic
- 04 R&B
- 05 Hip-Hop
- 06 K-pop
- 07 Tagalog
- 08 Easy Listening
- 09 Reggae
- 10 P-pop

COUNTRY FOCUS:

Saudi Arabia

Use licensed audio streaming	82%
Agree human creativity is essential in the creation of music	82%
Discover a new artist or music weekly	68%
Said music is important to their mental health	59%
Use unlicensed or illegal ways to listen to music	76%



HOURS SPENT LISTENING TO MUSIC EACH WEEK:

27.2

TOP 10 GENRES

- 01 Khaliji
- 02 Pop
- 03 Classical / Opera
- 04 Islamic Music
- 05 Shaabi
- 06 Iraqi
- 07 Hip-Hop
- 08 Rock
- 09 Egyptian Pop
- 10 Lebanese

COUNTRY FOCUS:

UAE

HOURS SPENT LISTENING TO MUSIC EACH WEEK:

28.7

Use licensed audio streaming

89%

Agree human creativity is essential in the creation of music

86%

Discover a new artist or music weekly

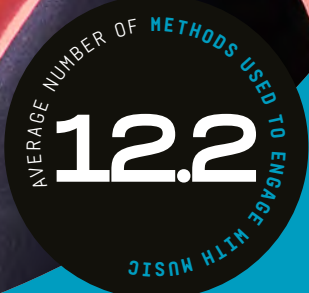
73%

Said music is important to their mental health

71%

Use unlicensed or illegal ways to listen to music

77%



TOP 10 GENRES

- 01 Religious Music
- 02 Pop
- 03 Classical / Opera
- 04 Hip-Hop
- 05 Khaliji
- 06 Bollywood
- 07 Rock
- 08 Shaabi
- 09 Dance / EDM
- 10 Latin

COUNTRY FOCUS:

Vietnam

Use licensed audio streaming

89%

Agree human creativity is essential in the creation of music

85%

Said music is important to their mental health

77%

Use unlicensed or illegal ways to listen to music

66%



HOURS SPENT LISTENING TO MUSIC EACH WEEK:

27.7

TOP 10 GENRES

- 01 V-pop
- 02 Hip-Hop
- 03 Ballad
- 04 Dance / EDM
- 05 K-pop
- 06 Bolero
- 07 Acoustic
- 08 Lo-fi / Lofi
- 09 Ambient / Chill-out
- 10 Soundtracks

