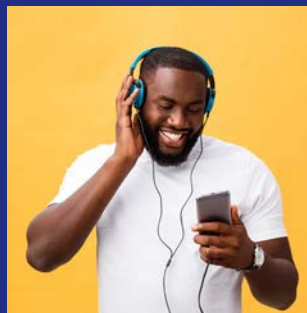




ifpi

representing the
recording industry
worldwide



Music Listening 2019



A look at how recorded
music is enjoyed around
the world

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Methodology

IFPI conducted global research in April-May 2019 which explored the way consumers engage with and access music across licensed and unlicensed services.

Fieldwork questioned 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, Russia, South Africa, South Korea, Spain, Sweden, United Kingdom and United States. The study was also conducted in China and India but results from these two countries are not included in "global" figures. These twenty-one territories accounted for 92.6% of global recorded music market revenues in 2018, according to IFPI's Global Music Report 2019.

In total, 34,000 internet users were surveyed with higher numbers of respondents in larger markets. Nationally representative quota samples of between 1,000-3,000 respondents were set in accordance with online population size and demographic structure, as determined by the latest respective census data in each territory. This ensured that a standard error of +/- 3% was achieved throughout the data, at a 95% confidence level. Study design, construction, and analysis was conducted by IFPI with fieldwork organised by AudienceNet.

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Introduction

A look at how recorded music is enjoyed around the world.



Music has always held an important place in people's lives, of course, but this year's report tells a story of fans' ever-growing global engagement with music. In fact, most people identify as "loving" or being "fanatical" about music. At a time when multiple forms of media vie for fans' attention, they are not only choosing to spend more of their time listening to – and engaging with – music but they are doing so in increasingly diverse ways.

This group of highly engaged fans seeks to listen, share and interact with music in their everyday lives in new ways through technology, social media, live gigs and performances and more. We also take a closer look at the vibrant music markets of China, India, Mexico and South Korea.

"This report paints a vibrant picture of a world enjoying the widespread availability of rich and varied music. Record companies work every day to make this happen."

As we explore listening habits at a country level, we see how fans are embracing local genres, not only enriching their lives but also shaping their culture.

The report also shows that, while fans access music differently from country to country, the ease of access and availability of large catalogues of music make streaming the most popular choice – among all generations of music listeners.

The enduring partnership between record companies and artists is the bedrock on which this growing, exciting global world of passionate music listeners is built. Record companies invest more than US\$5.8 billion in marketing and A&R each year, building the systems and partnerships to enable the licensing of more than 50 million tracks to hundreds of digital services worldwide. They collaborate with their artists to help connect them with fans around the world.

The report also highlights that the availability of music through unlicensed methods, or copyright infringement, remains a real threat to the music ecosystem. Practices such as stream ripping are still prevalent and return nothing to those who create and invest in music – jeopardising the health of the music ecosystem.

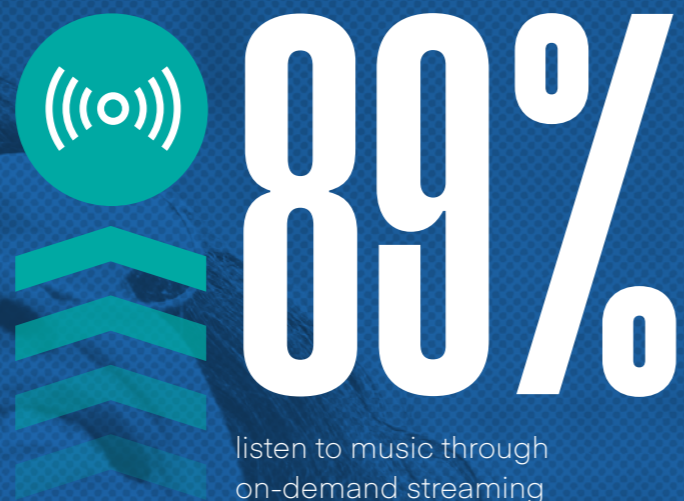
IFPI's Music Listening 2019 paints a vibrant picture of a world enjoying the widespread availability of rich and varied music. Record companies work every day to make this happen.

FRANCES MOORE
CHIEF EXECUTIVE, IFPI

Music listening in 2019

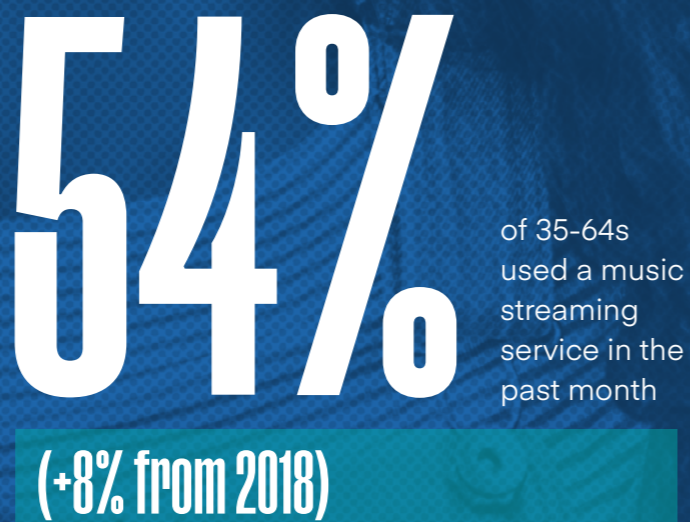
Across the world, more music is being listened to in increasingly varied ways. Based on research conducted by IFPI in 2019 across 19 leading music markets this report provides an insight into music listening habits.

Streaming music popular globally



There is a surge when it comes to older age groups using music streaming services

The highest rate of growth for use of streaming services is in the 35-64 age group



Time spent listening to music each week is up



More than the 17.8-hour average in 2018

More than 2.6 hrs daily

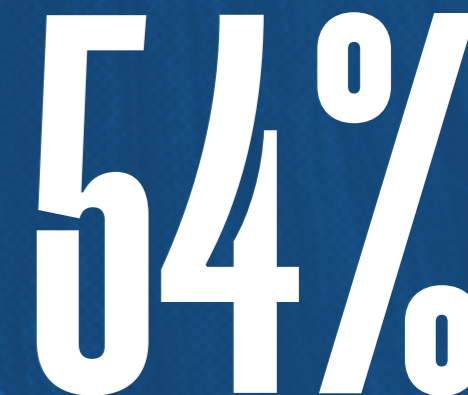
That is the equivalent of listening to

52

three minute tracks



Fans are highly engaged with music



say they love or are fanatical about music

Copyright infringement remains a threat



use illegal stream ripping services



Music streaming is popular across the world

In 2019, engagement with on-demand streaming is high across both paid and free services and all age groups. For audio streaming, access to large catalogues of music and convenience are cited as top reasons for using a streaming service.

Engagement with music streaming

89% listen to music through on-demand streaming

4 hrs Time spent listening to music through audio streaming each week

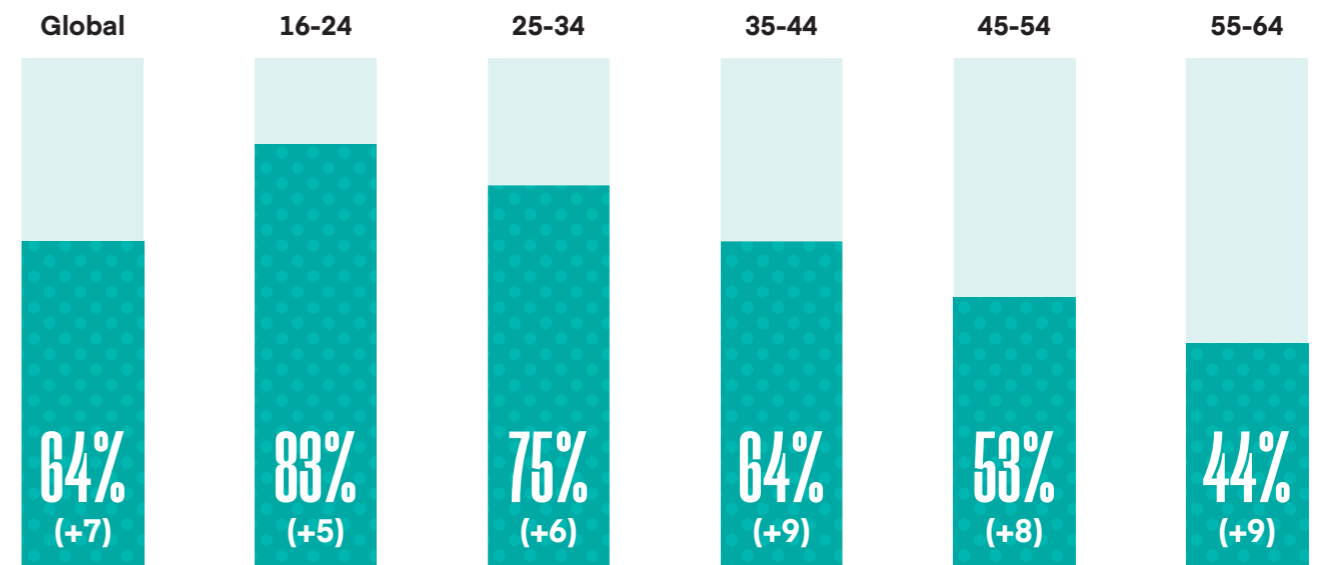
64% listened to music through audio streaming services in the last month

52% of 16-24 year olds used paid streaming in last month (highest of all age brackets)

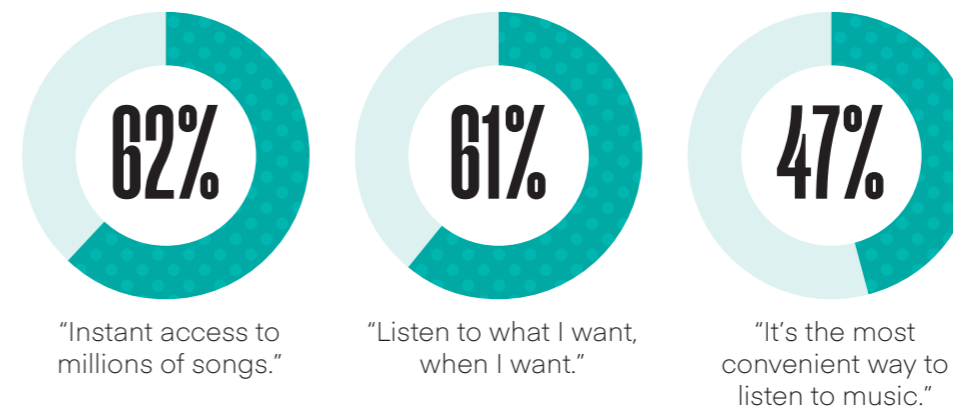
63% of 16-24-year olds used audio streaming services in the last day

3.5 hrs Time spent listening to music via video streaming each week

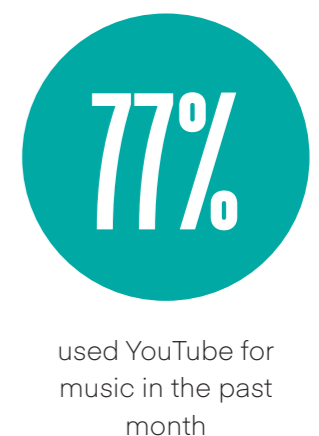
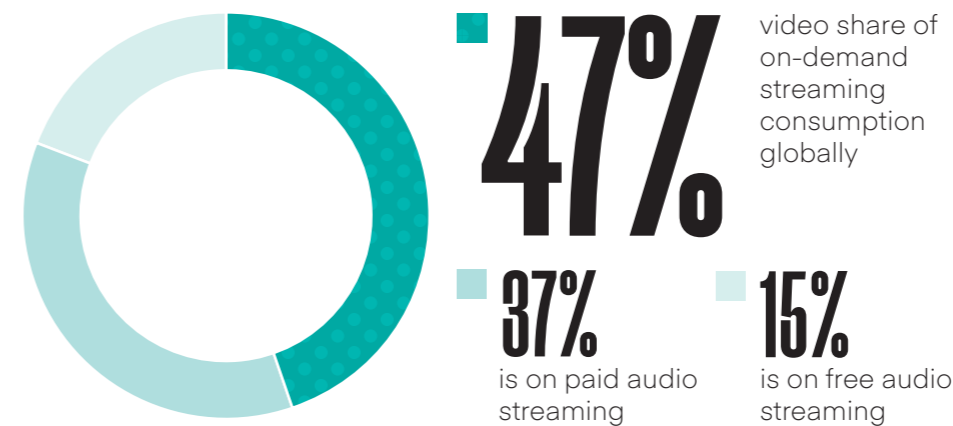
Increase in audio streaming engagement is highest in older age groups



The main reasons for enjoying audio streaming



On-demand video streaming

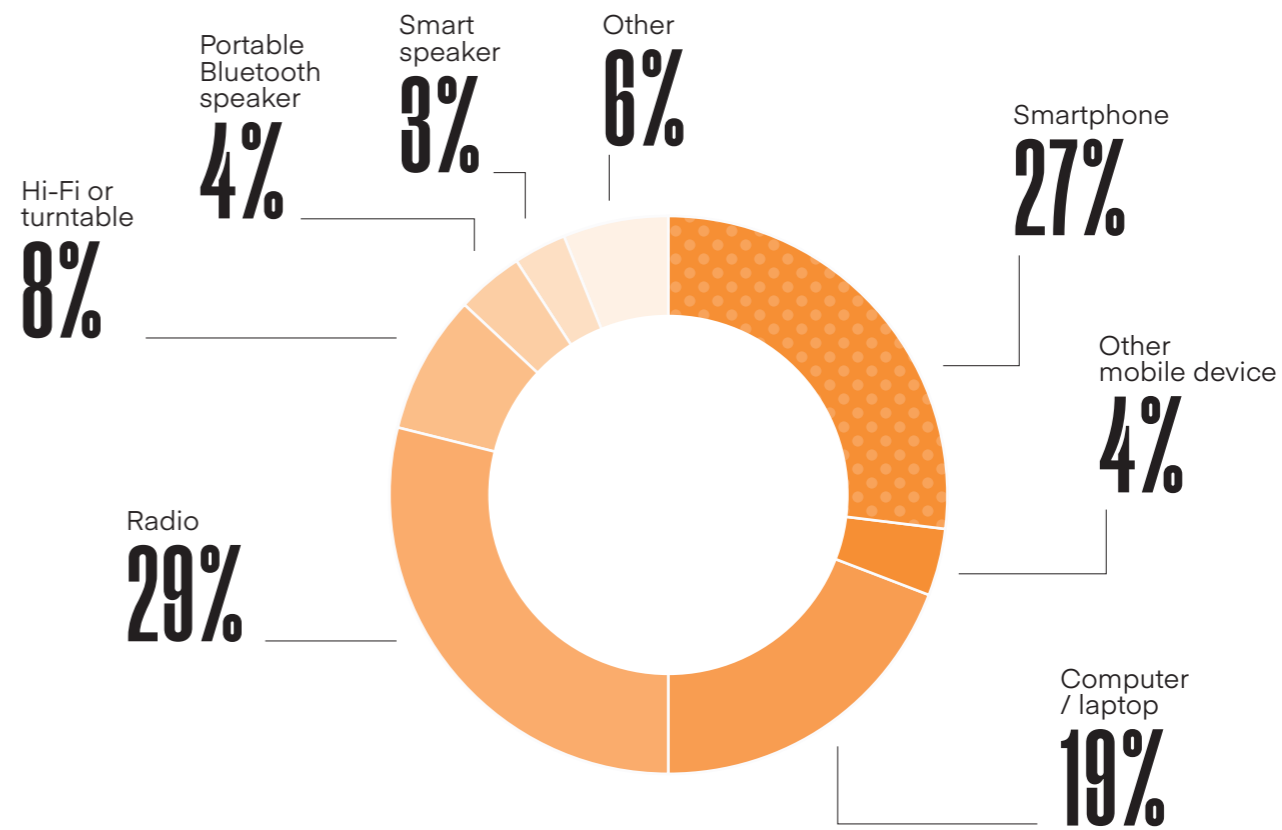


Device usage across age groups is varied



Rapid adoption of smartphones by younger users.

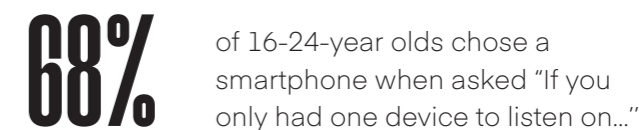
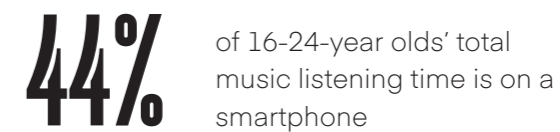
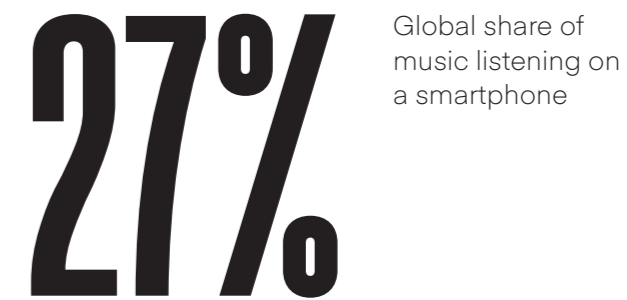
Global device share of music listening time



Number that used smart speakers for music in the last three months



Younger users rapidly adopting smartphones for music listening



A global picture of music lovers

A profile of music lovers



Listen to 50% more music each week

75%

Listen to 75% more music on-demand (e.g. through streaming services)



Listen to twice as much music through streaming services

X2

Are almost twice as likely to use audio streaming for music



Are twice as likely to pay for a streaming subscription



Listen to twice as much music on CD or vinyl



Are more than twice as likely to use TikTok and Snapchat on a daily basis



Listen to music at gigs or concerts almost three times as much

Across the world, highly engaged music fans are exploring new ways to listen to their favourite artists.

'Music lovers' is defined as those that identified as 'Music Fanatics' or 'Music Lovers.'

Music is loved globally



54%

More than half say they love or are fanatical about music



63%

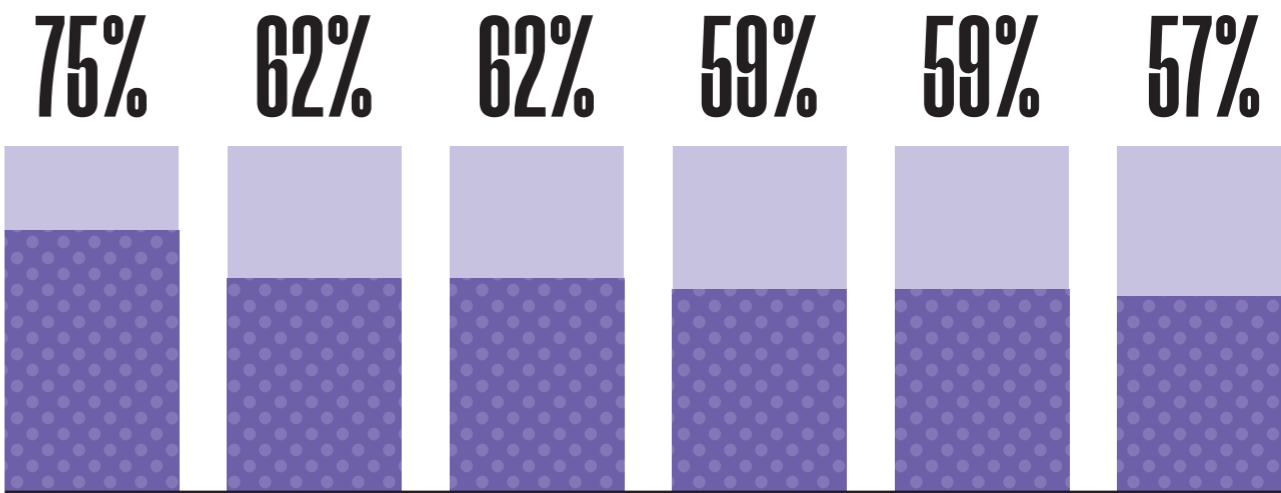
Loving music is highest amongst 16-24s



2.5%

Only a small number say music is 'unimportant' to them

Countries with a high % that say they are music lovers or music fanatics



South Africa



US



Mexico



Canada



Germany



UK

Top three listening activities:



70%

In the car



64%

Relaxing at home



51%

Cooking or cleaning

The world's favourite genres

Top 10 favourite genres globally

#01 | Pop

#02 | Rock

#03 | Oldies

#04 | Hip-hop/Rap

#05 | Dance/Electronic

#06 | Indie/Alternative

#07 | K-Pop

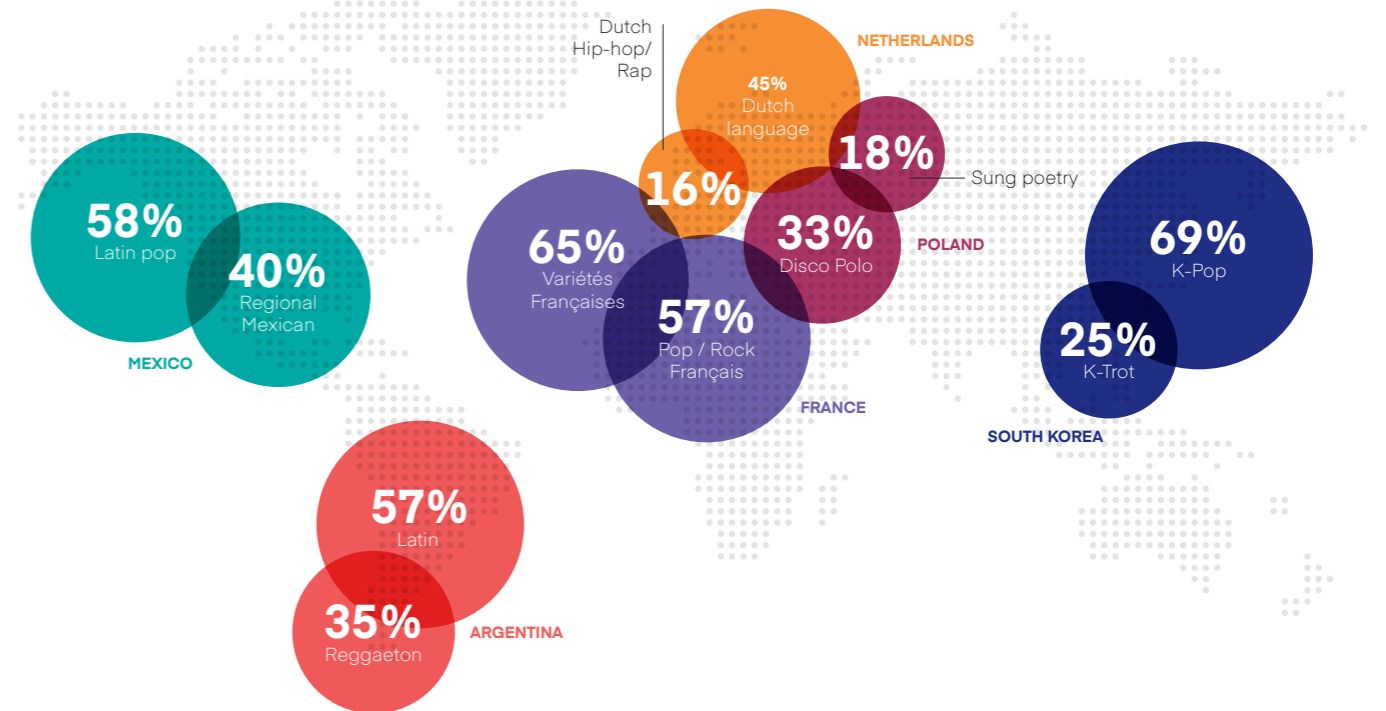
#08 | Metal

#09 | R&B

#10 | Classical

This year's Top 10 paints a diverse picture of music listening, with local genres performing well in numerous countries.

Local music genres embraced by fans



When asked 'What music do you typically listen to?'

Hip-hop and rap popular with young fans globally

4X

16-24s are more than four times as likely to choose hip-hop or rap as their favourite genre as any other age group

1 in 5

In South Africa (27%), Russia (23%), Poland (24%) and Germany (21%) more than one in five 16-24s say hip-hop / rap is their favourite genre

26%

In France, over a quarter (26%) of 16-24s say that French-language urban music or hip-hop / rap is their favourite genre of music



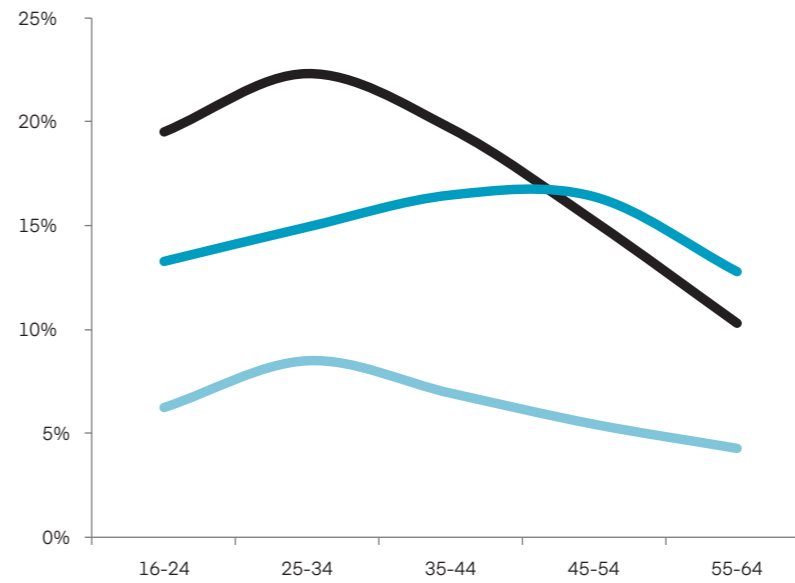
Music purchasing around the world



A snapshot of engagement with physical formats and digital downloads globally.

Music purchasing habits vary across age groups

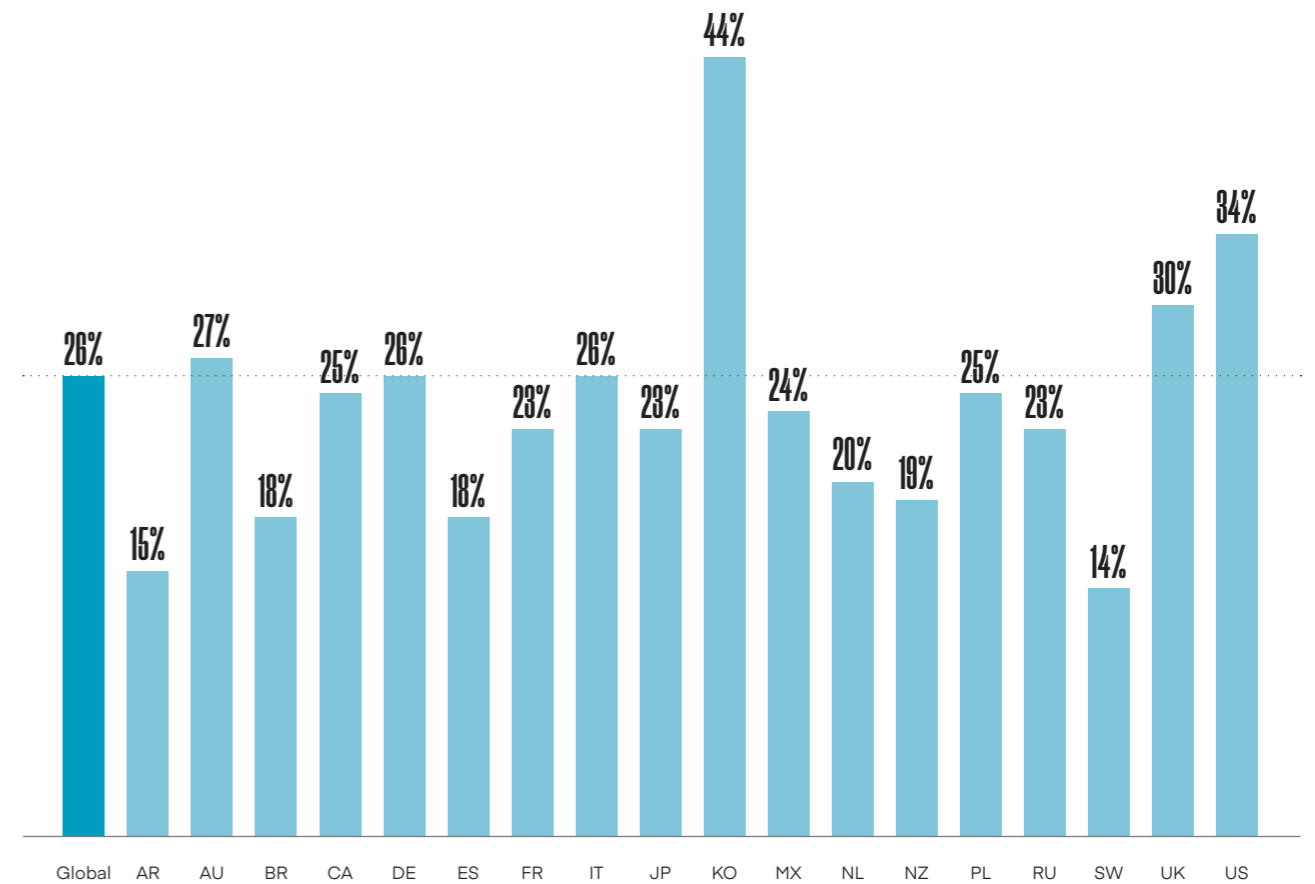
— Paid to download music — Buy any music on CD or DVD — Buy any music on vinyl



Purchased music in last month



Music purchasing across countries



Any music purchased in the last month (CDs, vinyl, downloads)

Radio listening



Across the world, radio remains an important part of people's music listening experience.

Devices used to listen to music on the radio



51%

use a smartphone



45%

use a standalone radio



10%

use a smart speaker or voice-activated speaker

Total hours spent listening to music on broadcast radio



Netherlands

10.5 hrs



Poland

9 hrs



Germany

8.3 hrs



New Zealand

7.3 hrs



South Africa

7 hrs

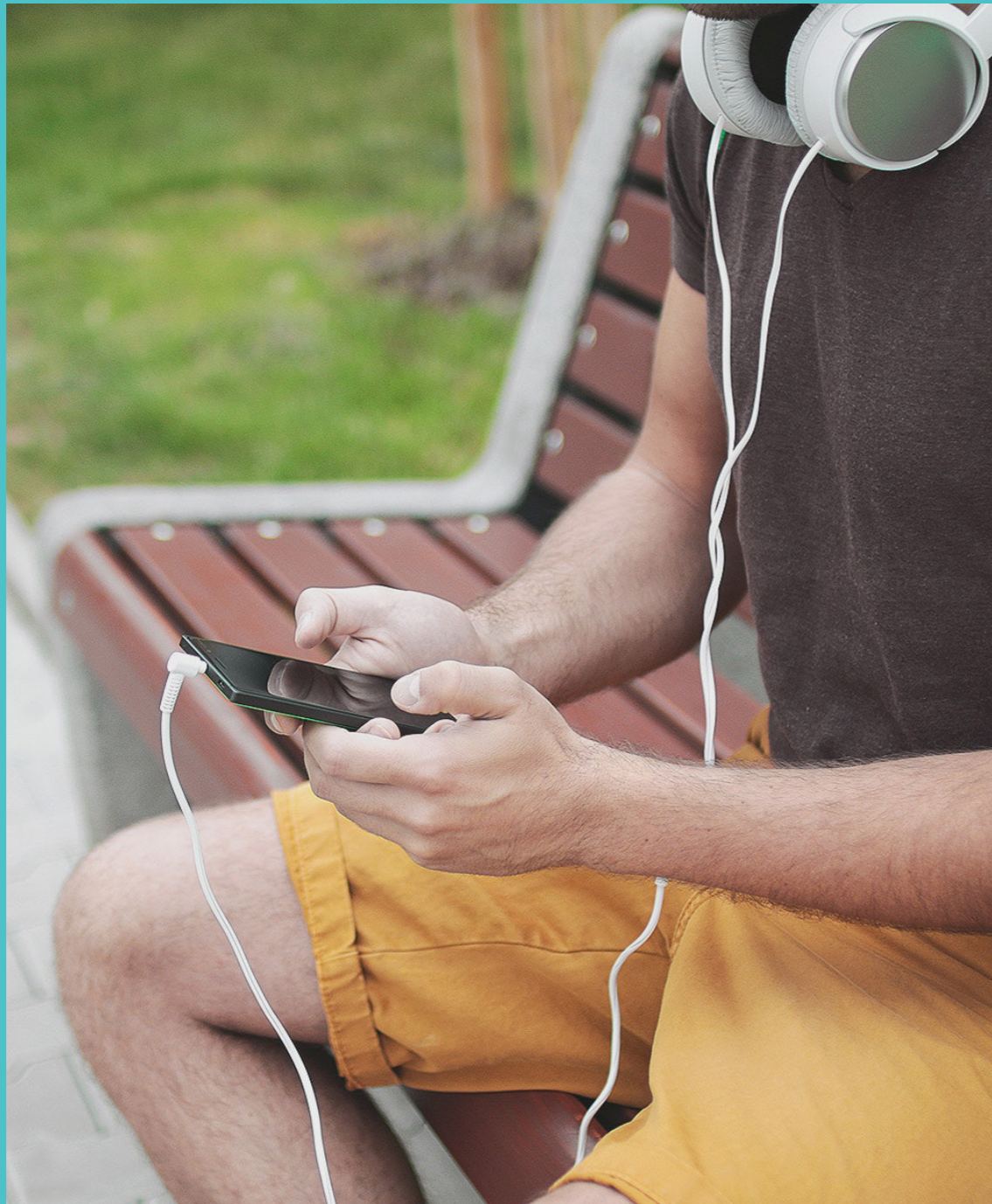


5.4hrs

each week spent listening to radio globally

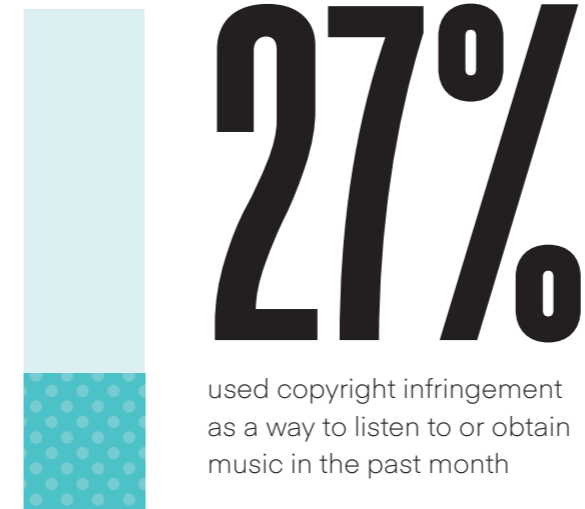
Radio listening includes broadcast radio (live or catch-up) and internet radio stations or services. It does not include the "radio" function on dedicated music streaming services.

Unlicensed music

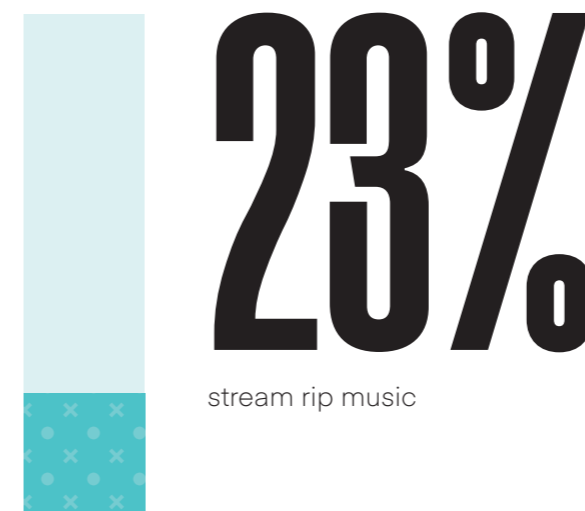


Using unlicensed sources to listen to or download music, otherwise known as copyright infringement, remains a threat to the music ecosystem.

Access to music through copyright infringement



38%
of 16-24s



34%
of 16-24s

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.



62%

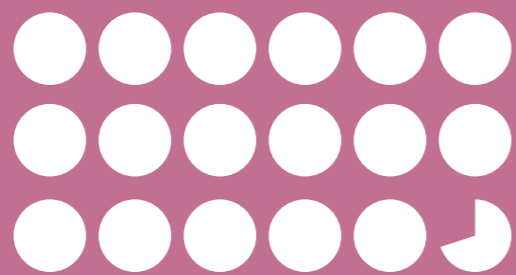
of those accessing content by unlicensed means would choose on-demand streaming to find and listen to music if copyright infringement was no longer an option



Social media plays a large part in engagement with music.

Time spent listening to music each week

17.7 hrs



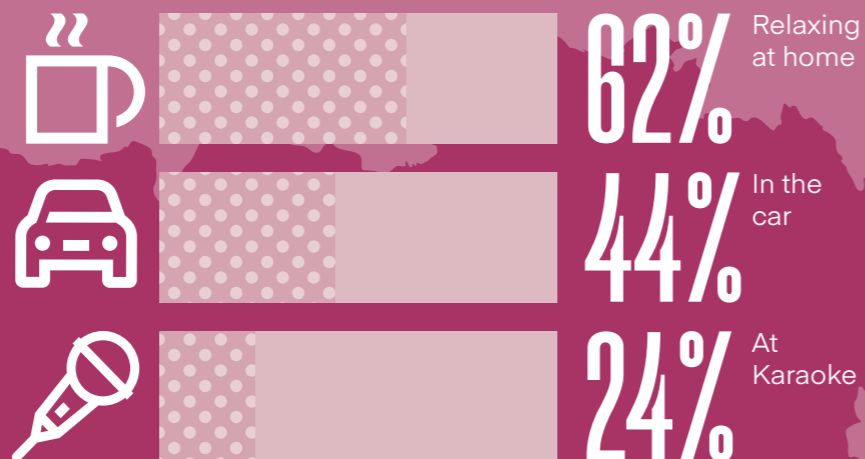
Device usage in past three months

96%

use smartphones to listen to music



Listening activities



Favourite genre

- #01 | Pop
- #02 | Oldies
- #03 | C-Pop
- #04 | Soundtracks
- #05 | Folk
- #06 | Classical / Opera
- #07 | Rock
- #08 | Dance / Electronic
- #09 | Singer-songwriter
- #10 | Chinese Traditional Opera

Social media usage



74%

use social media sites or apps to listen to music or watch music videos

*Any social media sites or apps used to listen to music or watch music videos in the last day

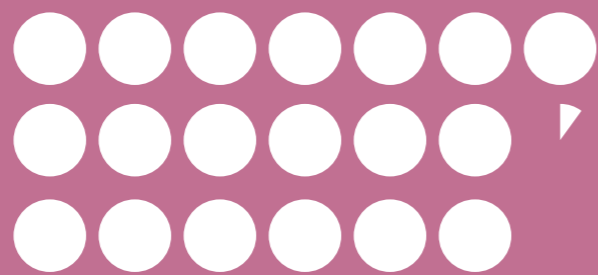


India

Local music dominates favourite genres.

Time spent listening to music each week

19.1 hrs



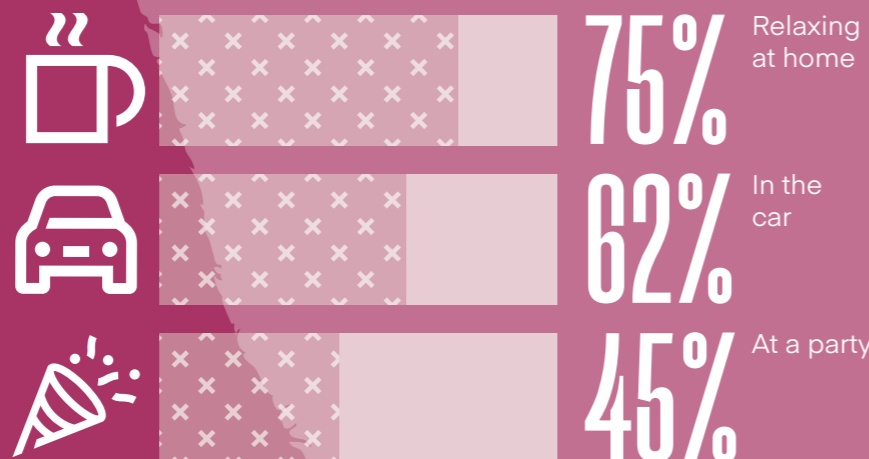
Device usage in past three months

97%

use smartphones to listen to music



Listening activities



Favourite genre

- #01 | Bollywood New
- #02 | Bollywood Old (Kishore, Rafi etc.)
- #03 | Other regional music (e.g. Telugu, Tamil, Marathi, Bhojpuri)
- #04 | Punjabi
- #05 | Pop
- #06 | Hip-Hop / Rap
- #07 | Oldies
- #08 | Devotional / Spiritual Music
- #09 | Indian Classical Music – Hindustani
- #10 | Soundtracks

Social media usage



62%

use social media sites or apps to listen to music or watch music videos

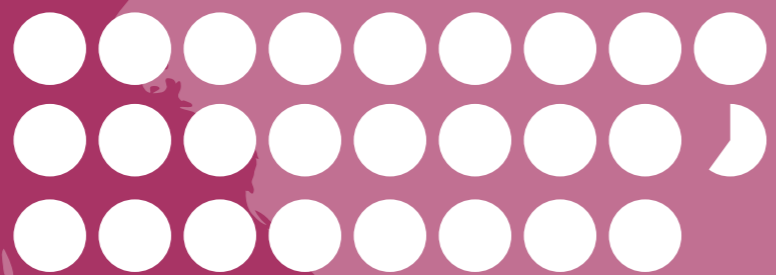
**Any social media sites or apps used to listen to music or watch music videos in the last day*



Mexico

Time spent listening to music each week

25.6 hrs



Device usage in past three months

95%

of consumers use smartphones to listen to music.



Listening activities



52% On my commute



45% Exercising / at the gym



44% At bars or clubs

Highly engaged listeners in Mexico embrace music in all aspects of their lives.



Favourite genre

- #01 | Rock
- #02 | Pop
- #03 | Latin pop
- #04 | Regional Mexican
- #05 | Oldies
- #06 | Dance / Electronic
- #07 | Latin
- #08 | Reggaeton
- #09 | Indie / Alternative
- #10 | Metal

Social media usage



56%

use social media sites or apps to listen to music or watch music videos

*Any social media sites or apps used to listen to music or watch music videos in the last day



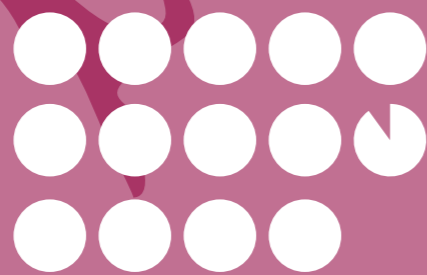
South Korea



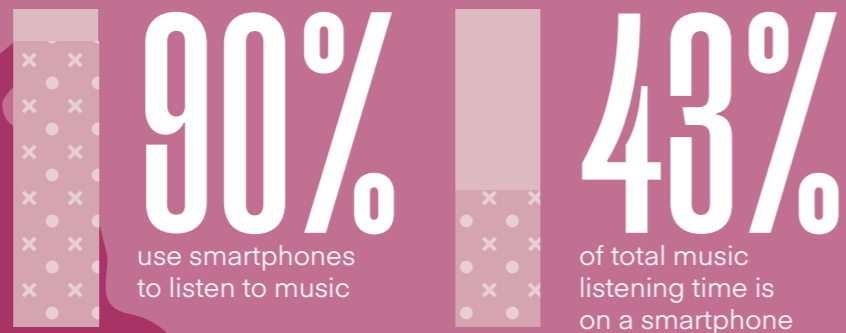
Home-grown talent amongst favourite genres.

Time spent listening to music each week

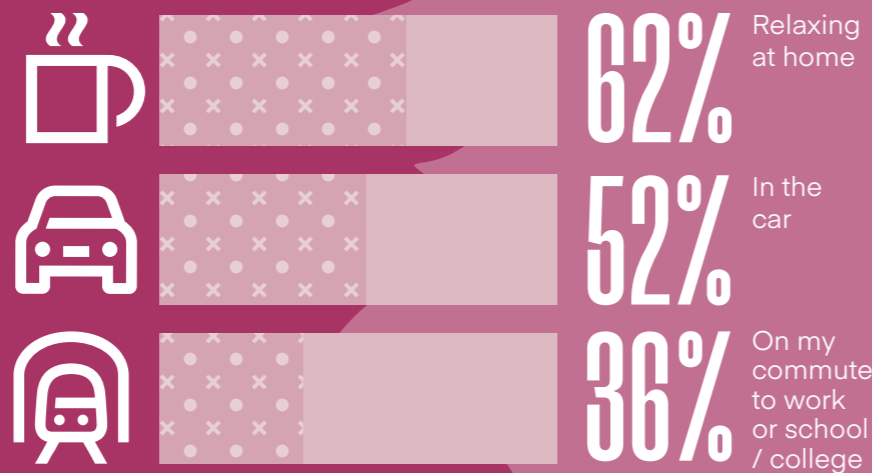
13.9 hrs



Device usage in past three months



Listening activities



Favourite genre

- #01 | K-Pop
- #02 | Pop
- #03 | K-Trot
- #04 | Classical / Opera
- #05 | R&B
- #06 | Soundtracks
- #07 | Rock
- #08 | Dance / Electronic
- #09 | Christian / Gospel
- #10 | Hip-Hop / Rap



About IFPI



IFPI is the organisation that promotes the interests of the international recording industry worldwide. Its membership comprises some 1,300 major and independent companies in almost 60 countries. It also has affiliated industry groups in 56 countries. IFPI's mission is to promote the value of recorded music, campaign for the rights of record producers and expand the commercial uses of recorded music in all markets where its members operate.



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