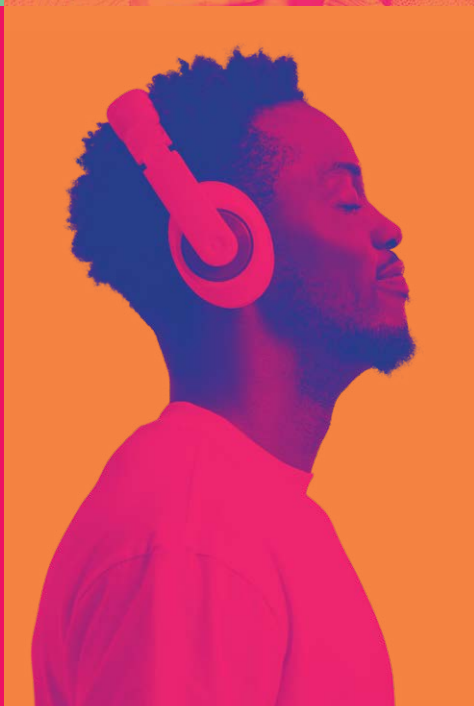
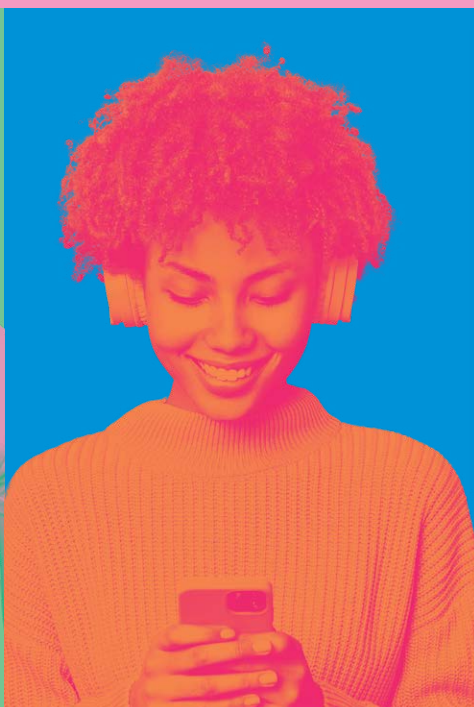


Engaging **with Music**

2021



ifpi representing the
recording industry
worldwide

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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 recorded music, campaign for the rights of record producers and expand the commercial uses of recorded music around the world.

Methodology

IFPI's *Engaging with Music 2021* 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, 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 due to the size and nature of these markets.

In total, 43,000 internet users were surveyed with higher numbers of respondents in larger markets.

Samples of between 1,000-4,000 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.

The 21 countries surveyed accounted for 91% of global recorded music market revenues in 2020.

Fieldwork took place in June and July 2021 when some levels of pandemic restrictions were still in place in all surveyed countries.

Introduction

Music fans worldwide go beyond listening...
to deeper engagement with music



Fans around the globe are connecting with the artists and music they love in ways never before imagined.

IFPI's *Engaging with Music 2021* paints a rich and diverse picture of the growing ways that fans enjoy music around the world.

Based on the views of 43,000 music fans across 21 countries – the largest study of its kind – the research finds that not only are fans listening to more music, but that they are also seizing opportunities to engage with new, dynamic, and immersive music experiences.

Fuelled by record labels' investment, the incredible abundance and growth of music licensed to streaming services is driving this engagement – particularly through subscription audio streaming, which provides fans the access and autonomy to choose the artists and music they love.

In addition, music has provided fans with comfort and healing through these challenging times. *Engaging with Music* reflects music's powerful contribution to emotional wellbeing. Younger fans in particular acknowledged the supportive role that music plays in their lives.

We also see the continued embrace and love of local genres, celebrated within the unique music cultures found in each country.

This exciting music landscape continues to evolve and enrich music fans' experiences, including the

development and enjoyment of short-form video – a category that did not even appear in our last report two years ago – as well as other areas, like livestreaming and gaming, to name just a couple.

Unfortunately, just as licensed music entertainment evolves with technology, so too does unauthorized use of copyrighted content. This diverts revenue from those who invest in and create music – harming the prospects of newer artists. Leaks of pre-release content undermine artist campaigns that are sometimes years in the planning. We work with governments worldwide to ensure we have the right tools in place to tackle this issue.

The increasingly dynamic and exciting ways fans are now engaging with music are born from an environment in which those that own the rights to music have the freedom to license it for use in these new and increasingly immersive ways. They are enriching the experience for music fans and enhancing the opportunities for artists to share their music and see revenue from it. We continue to campaign for a fair environment to do this around the world. These are the successes needed to preserve the health of the music ecosystem.

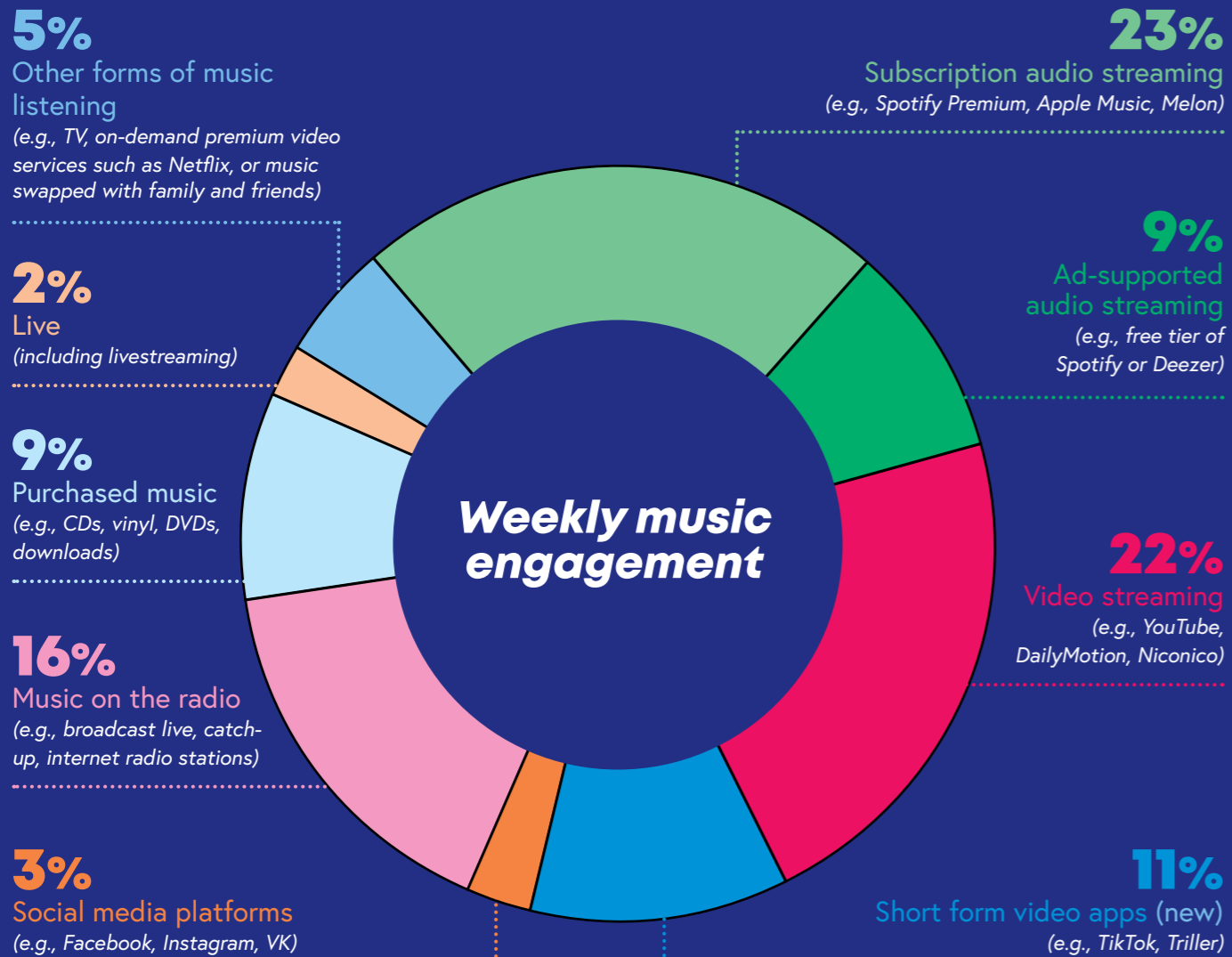
We hope that you enjoy this year's report and welcome you to visit our website (ifpi.org), the authoritative source of regularly updated information about recorded music.

FRANCES MOORE
CHIEF EXECUTIVE, IFPI

A global snapshot of music engagement in 2021

Based on research conducted by IFPI across 21 of the world's leading music markets, this report shines a light on people's love of music and the central role that it plays in our everyday lives.

The music engagement mix



18.4 hours

Time spent listening to music each week
▲ Up from 18 hours in 2019

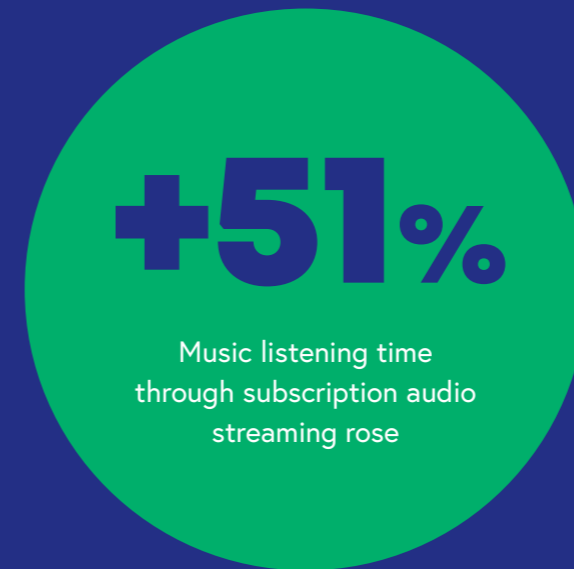


That's the equivalent of listening to 368 3-minute songs a week



68%

of the time spent on short form video apps involved music-dependant videos such as lip syncing and dance challenges



29%

Watching music livestreams was popular, with almost a third tuning into an event in the last twelve months



80%

Music's healing power was apparent. Eight in ten said that music helped with their emotional wellbeing during the pandemic



30%

One in three people still admit to using unlicensed or illegal ways to listen to or obtain music

Audio streaming popular the world over

Engagement with streaming – particularly subscription audio streaming – continues to grow, driven by the ability of listeners to find their favourite songs, artists, and their own playlists.

78%



More than three-quarters of people said they listen to music through licensed audio streaming services (subscription and ad-supported)

+51%

There was strong growth in time spent listening to music on subscription audio streaming services, which reinforces the strong attraction of streaming to music fans

35%

of those who didn't subscribe to a paid streaming service said it was because anything they wanted to listen to was available on free video streaming services



The top 3 reasons given for paying to use a streaming service reflected a desire for undisturbed on-demand listening to the wealth of licensed music available

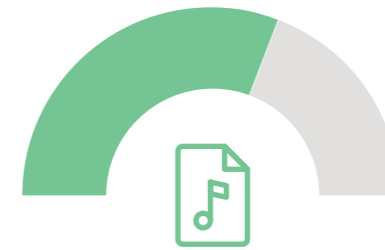
- 01** No adverts interrupting the music
- 02** I can listen to what I want when I want
- 03** Access to millions of songs

When asked how they selected music on streaming services, user's top three options were the ability to choose favourite songs, artists, and their own playlists



68%

said they search for specific songs more than once a week
82% of 16-24s



62%

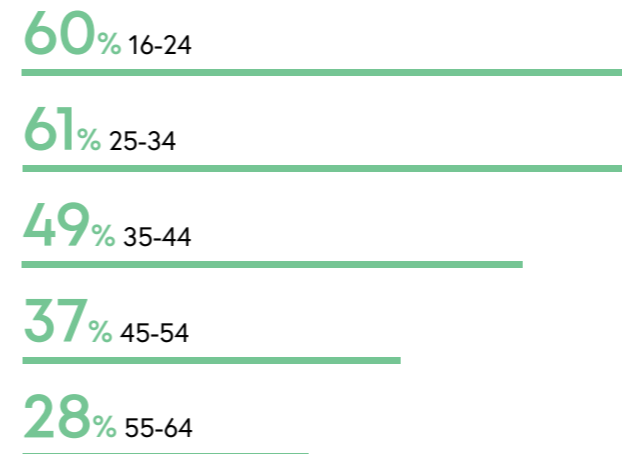
said they listen to playlists they created more than once a week
78% of 16-24s



62%

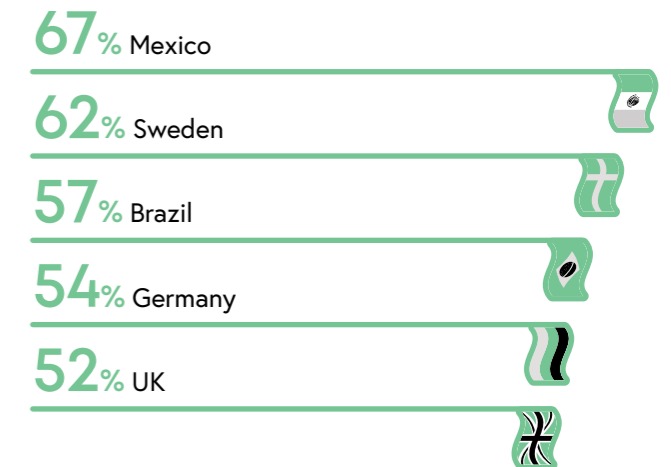
said they search for a specific artist more than once a week
73% of 16-24s

The use of subscription audio streaming was highest in younger demographics.*



* In the last month

Top 5 countries that spent the most time listening to music through paid subscription streaming.*

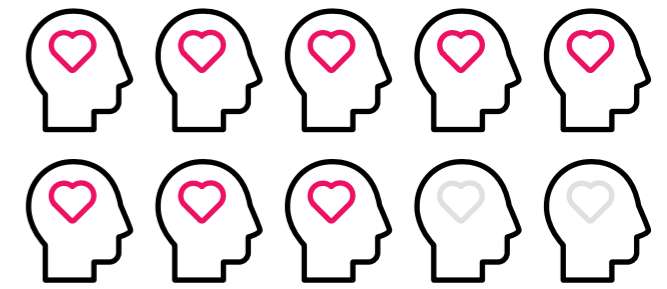
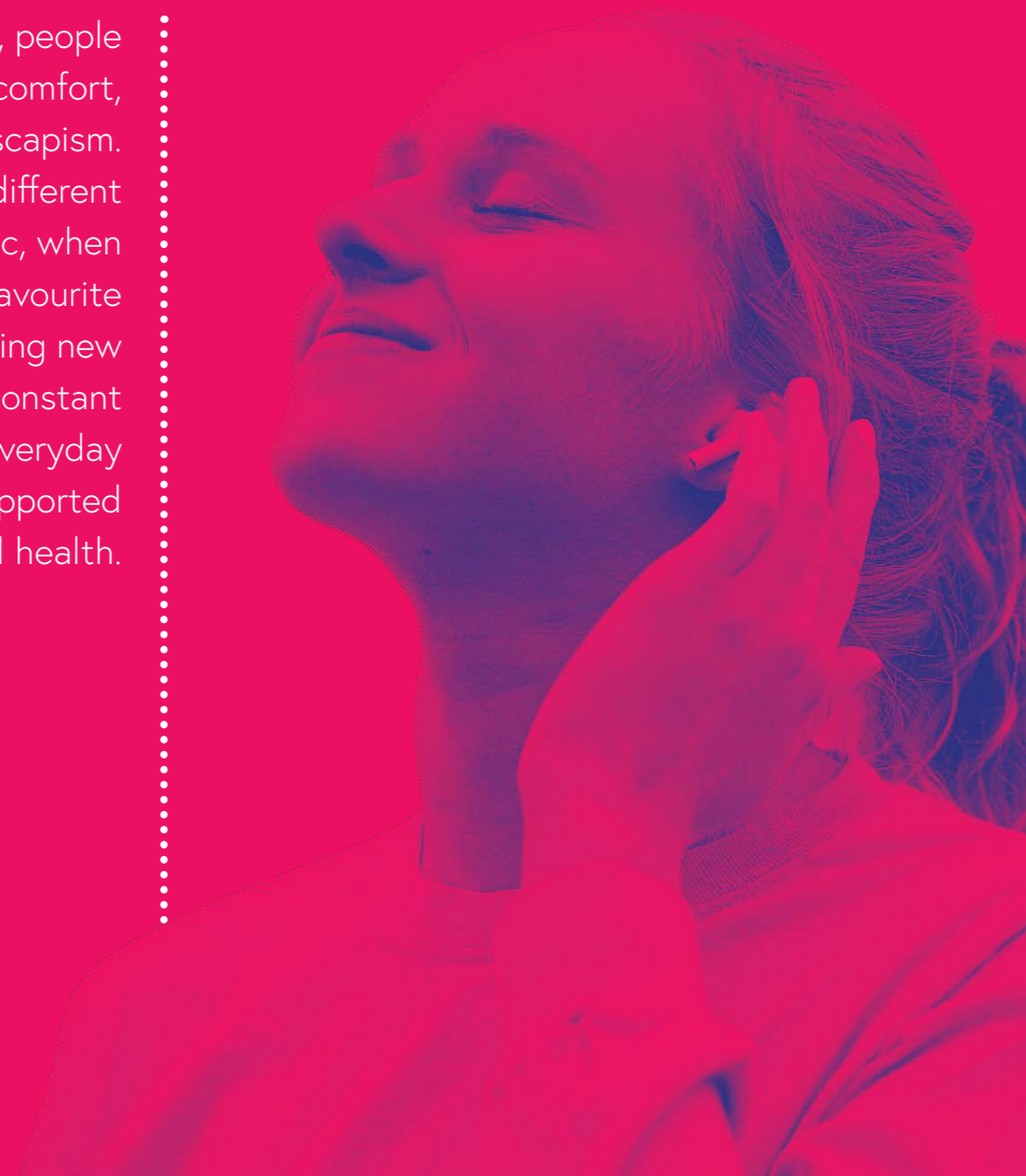


* In the last month

Music's positive impact on wellbeing

All over the world, people turn to music for comfort, enjoyment, and escapism.

This was no different during the pandemic, when releases from favourite artists, discovering new music, and music's constant presence in everyday activities, supported people's mental health.



reported that music helped with their emotional wellbeing during the pandemic

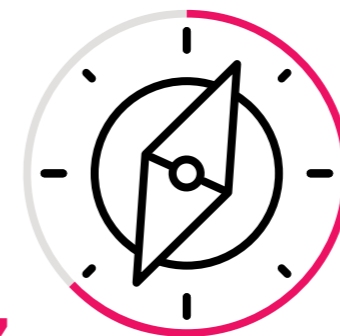
Music's positive impact on wellbeing affected even more 16-19s **85%**

75%

For three quarters of people music provided a sense of normality during the pandemic

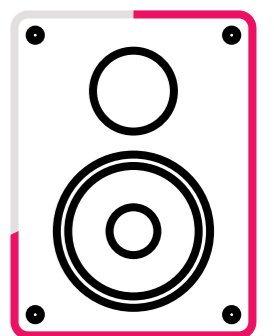
73%

Almost three quarters said that despite their routine changing, they could always listen to music when needed



63%

spent time during the pandemic exploring new music and finding new favourites



68%

of 16-19s said new releases from favourite artists helped them during the pandemic

A new and exciting landscape for music engagement

This year's study paints a rich and diverse picture of music engagement, with the rapid emergence of short form video and in-game experiences, all driven by people's love of music.

Music is at the heart of engagement with short form video



of the time people spent on short form video apps involved music-dependent videos such as lip syncing and dance challenges

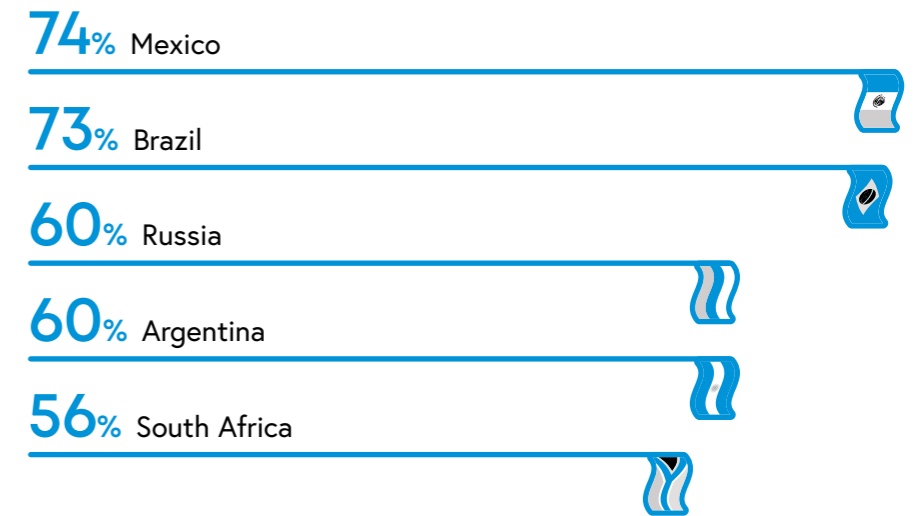


agreed or strongly agreed that music is central to what they enjoy about TikTok



of short form video users downloaded the app during the pandemic

Top 5 countries with the highest monthly use of short form video apps



Livestreamed concerts proved popular...and here to stay

29%

Almost one in three said they had watched a music livestream such as a concert in the last 12 months

Engagement was highest in:

Brazil **61%**

Mexico **44%**

South Africa **44%**



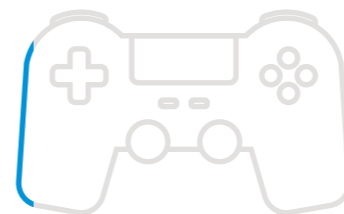
65%

agreed that they would continue to watch music livestreams even when in-person concerts were possible after pandemic restrictions were relaxed

55%

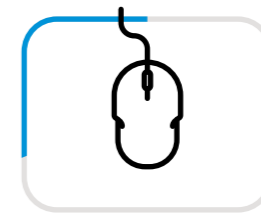
said livestreams are a great option when they can't attend concerts in person

Music's longstanding relationship with gaming continues



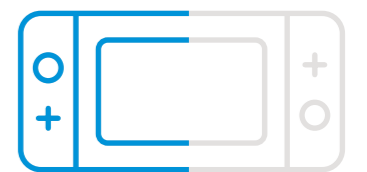
1 in 20

said they had watched a music livestream through a gaming platform



31%

of gamers have attended a virtual concert on platforms like Fortnite, Roblox, or Minecraft



52%

of gamers are interested in watching virtual music concerts on gaming platforms

The world's favourite genres

Across 43,000 respondents, over 300 different genres were named by at least one person as the music they typically listen to – including gqom, axé, and hokkien song, reflecting the rich and diverse music landscape fans now enjoy around the world.



Top 10 favourite genres globally



01 Pop

02 Rock

03 90s

04 80s

05 Soundtracks

06 Hip-Hop / Rap / Trap

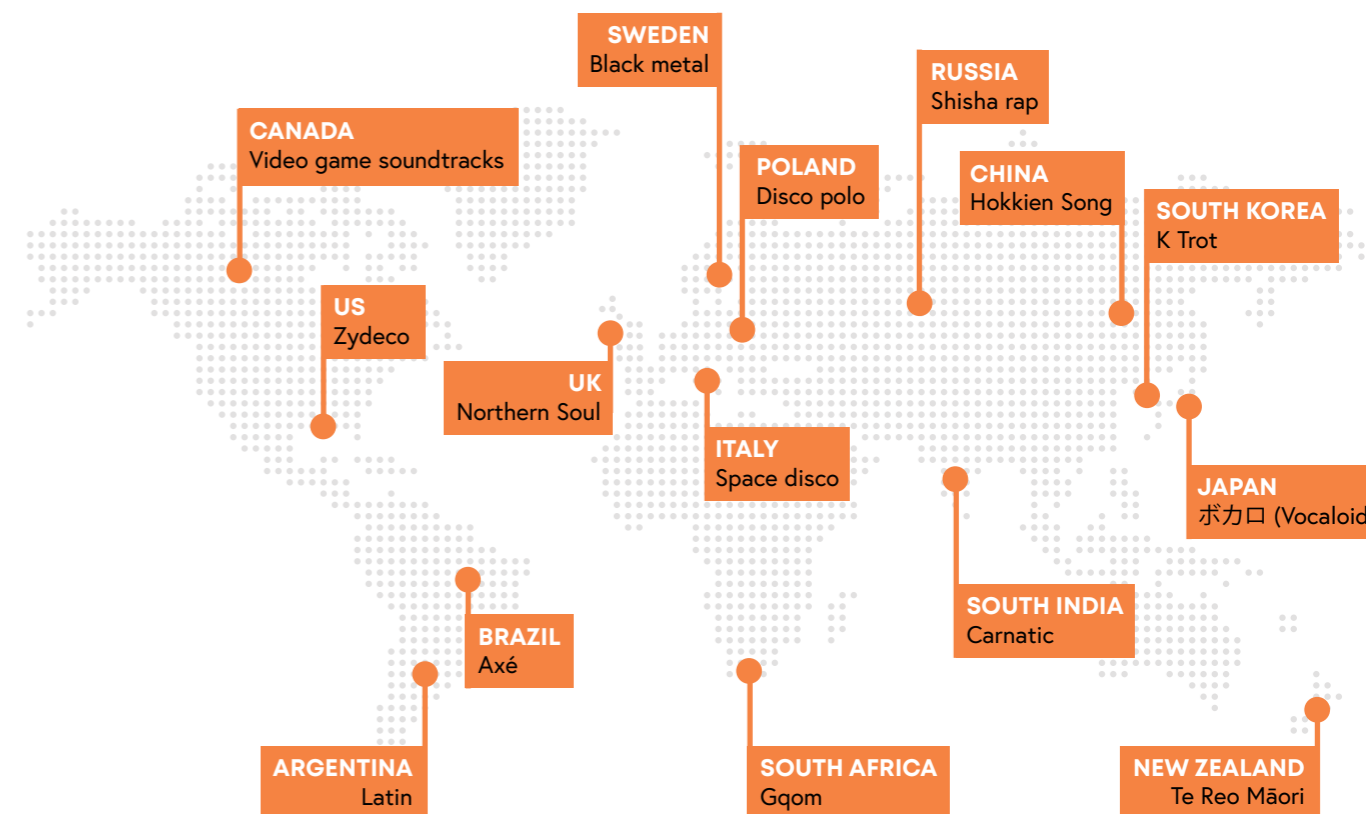
07 R&B

08 Dance / Electronic / House

09 70s

10 Soul / Blues

Here are just some of the 300+ genres identified as being enjoyed by music fans all over the world

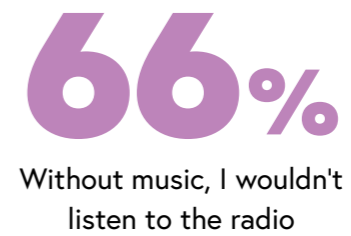
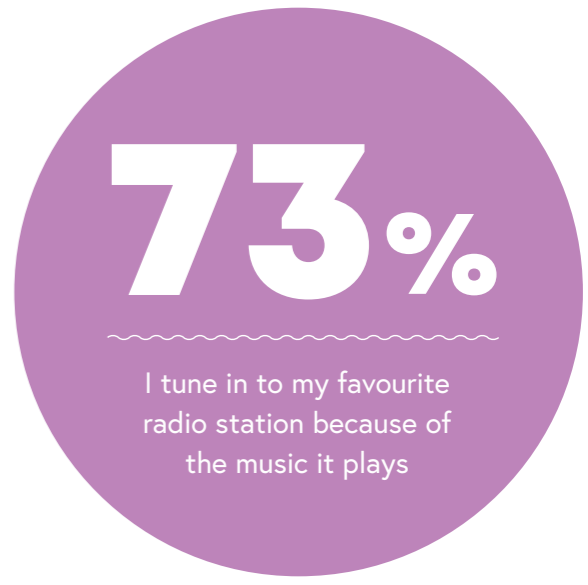
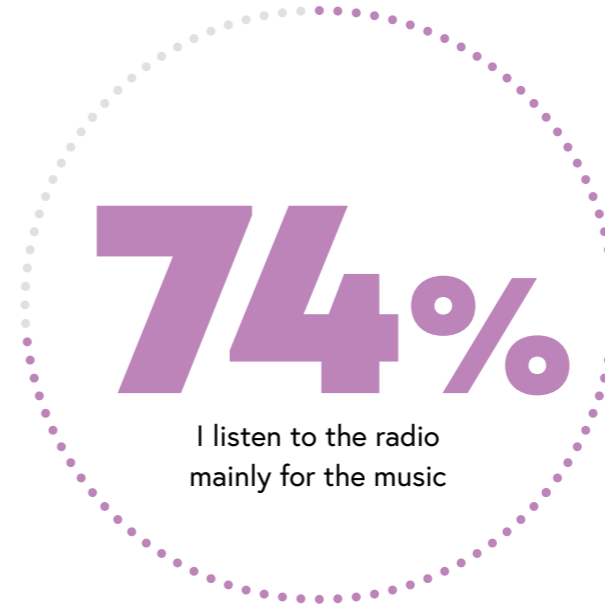


Radio listening

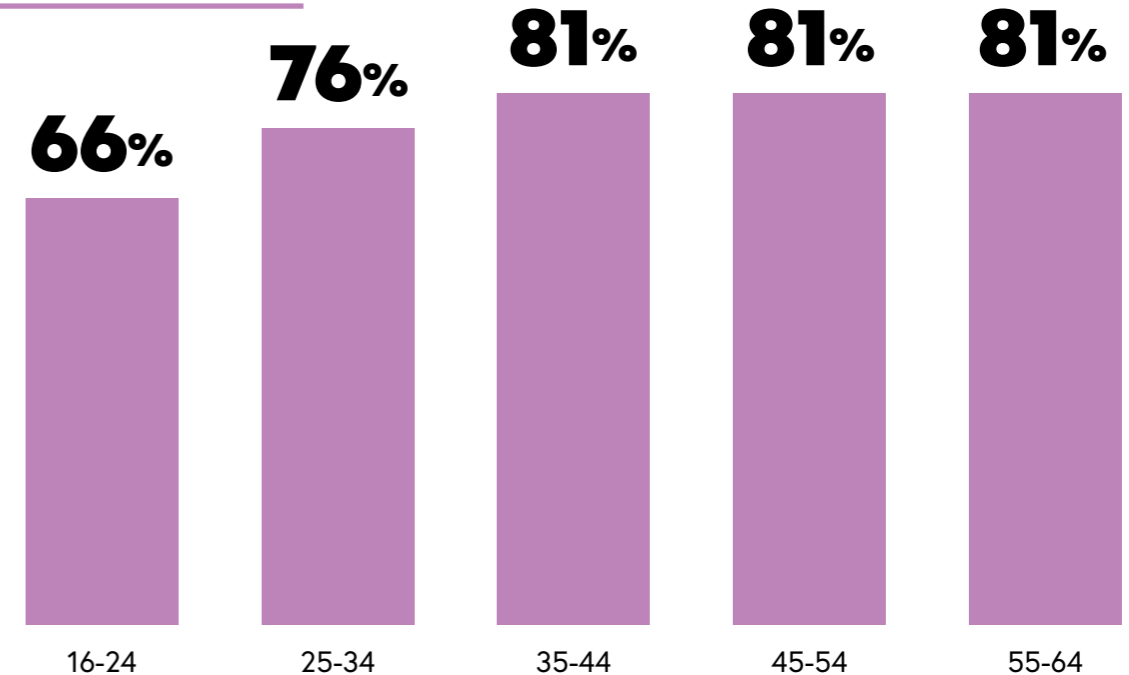
Radio continues to form an important part of the listening mix, and music was the primary reason for tuning in.



Music fuels people's engagement with radio



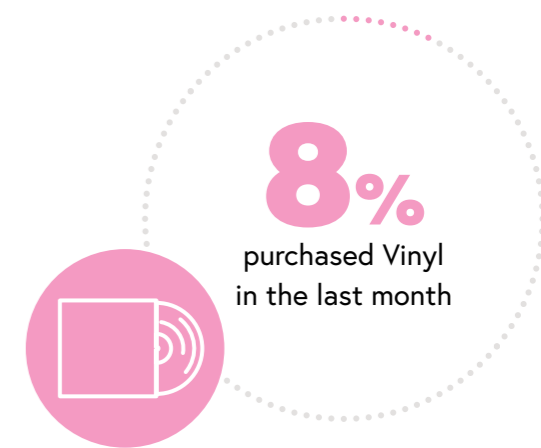
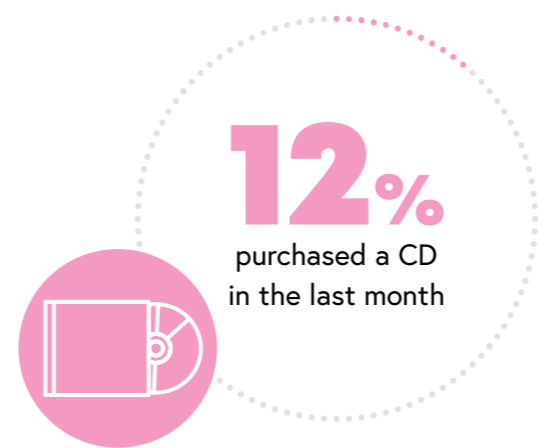
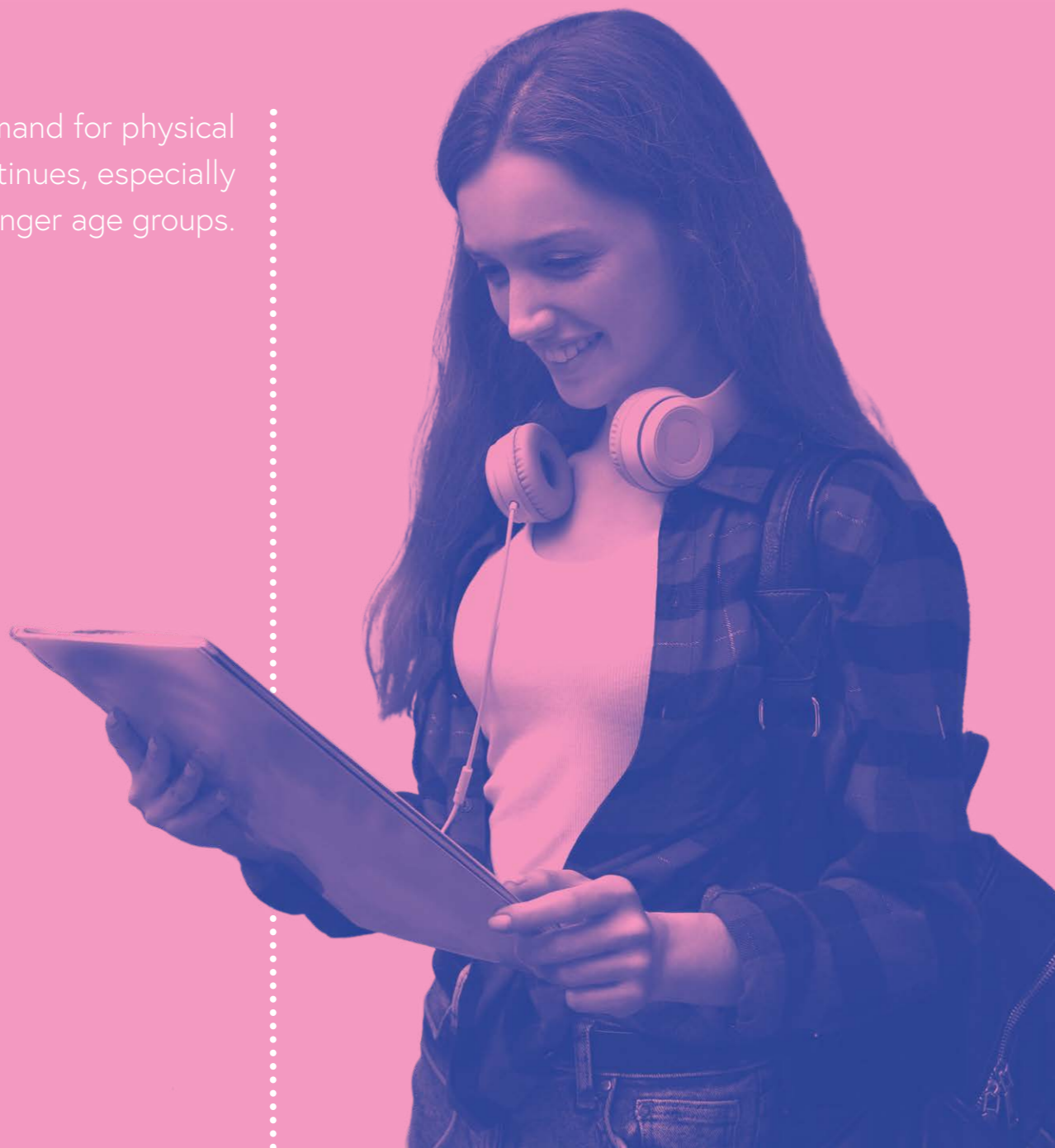
All age groups reported strong engagement with radio*



* Last three months

Music purchasing around the world

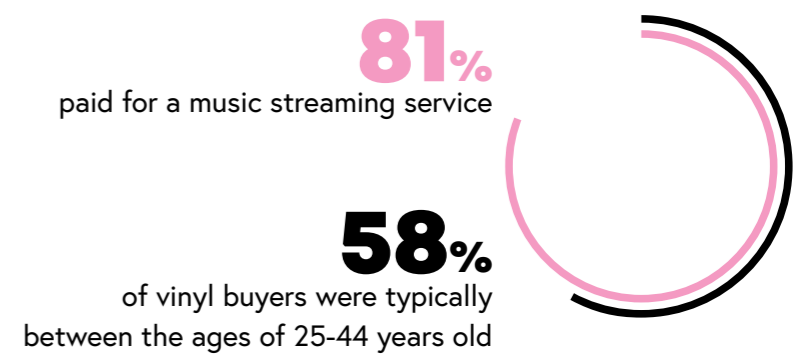
The demand for physical music continues, especially in younger age groups.



Vinyl fans like the varied ways they could engage with the format

- 40%** I like collecting vinyl
- 31%** I like the ritual of playing vinyl
- 30%** I like immersing myself in a full album
- 21%** I like reading the liner notes

Vinyl purchasers were highly engaged with music across all formats, including newer experiences such as livestreaming



- 67%** said they discovered new music or new artists on a weekly basis
- 80%** said they enjoyed livestreams of music during the pandemic
- 80%** engaged with music on social media
- 57%** owned a smartspeaker
- 22.1** hours spent listening to music a week (20% higher than average)

Engagement with unlicensed music

The availability of unlicensed music remains an issue for the music ecosystem, with almost a third of people reporting to have used illegal or unlicensed methods to download and listen to music.

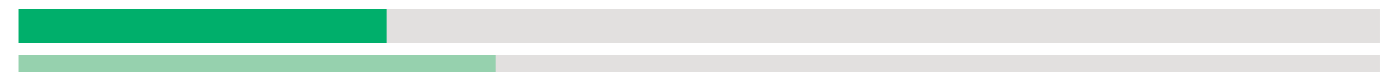


30% used copyright infringement as a way to listen to or obtain music



38% of 16-24s

27% used stream ripping sites as a way to listen to or obtain music



35% 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.

14% used unlicensed social media platforms for music purposes



23%
uploaded and shared music



21%
sought unauthorised leaks of new music



18%
downloaded music



COUNTRY FOCUS

China



In China, short form video was a significant part of engagement with music, with over half of people's time on apps such as Douyin spent watching music-dependant videos.

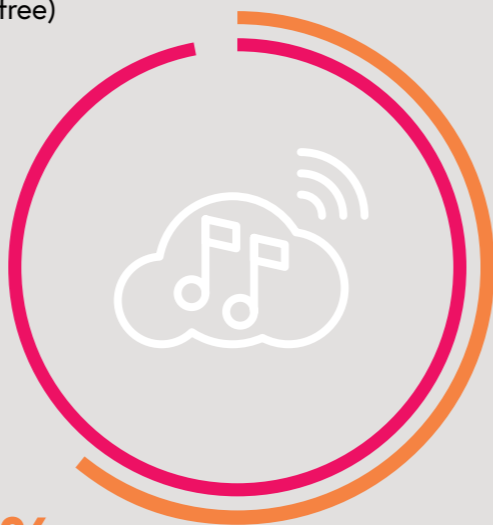


22.9 hrs

Time spent listening to music each week
(up from 17.7hrs in 2019)

97%

engaged with music through licensed audio streaming services (paid and free)



61%

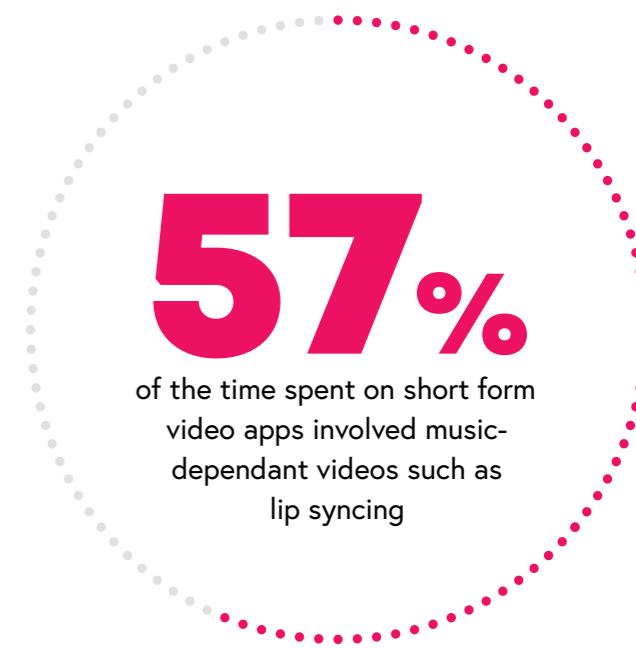
used a paid streaming service (25% in 2019)

45%

of music listening time was spent on short form video apps

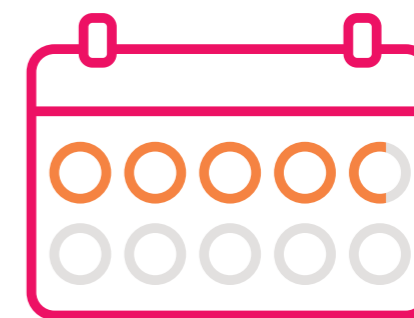
Top 10 genres

- 01 Pop
- 02 C-Pop
- 03 Cantonese Songs
- 04 Soundtracks
- 05 90s music
- 06 Chinese folk music
- 07 Singer-songwriter
- 08 80s music
- 09 K-Pop
- 10 Rock



92%

said music helped with their emotional wellbeing during the pandemic



46%

watched a music livestream in the last twelve months

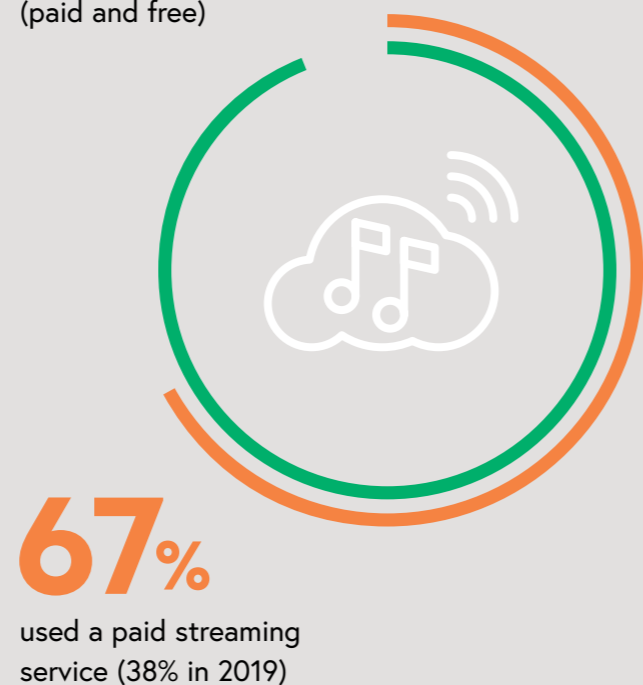
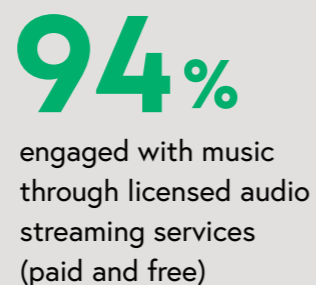


COUNTRY FOCUS

India

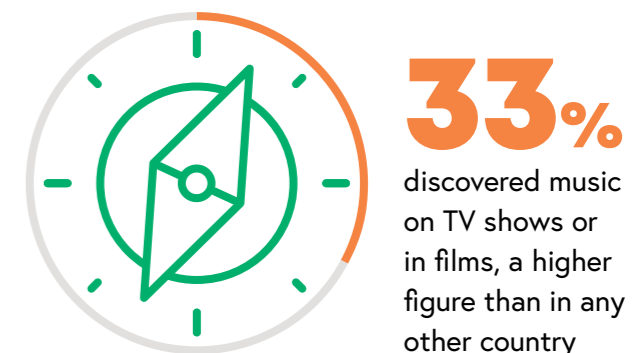
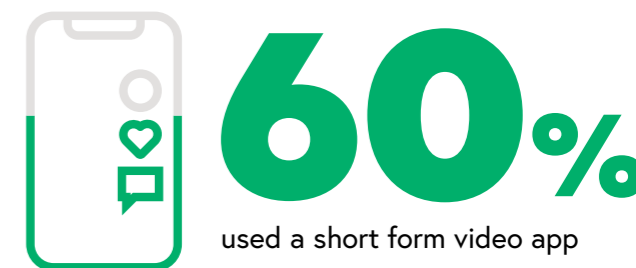
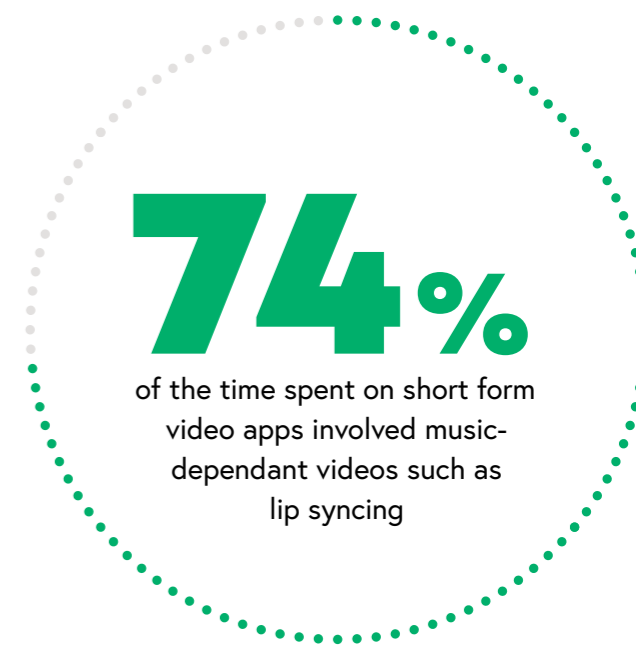


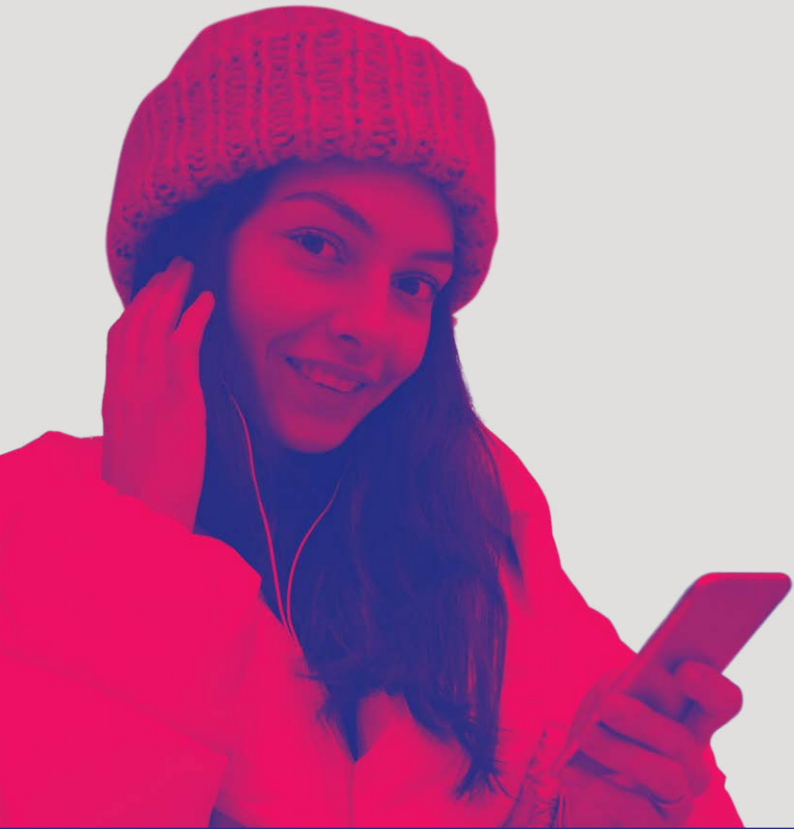
Much like India's rich and varied cultures, music engagement in the country was diverse. Local genres shone and the emergence of newer formats – such as short form video apps – also formed a significant part of the music mix.



Top 10 genres

- 01 Bollywood
- 02 Bollywood
Coming of Age (80s, 90s)
- 03 Bollywood
Retro (50's, 60's, 70's)
- 04 Punjabi
- 05 Traditional Music Only (e.g., Hindustani, Carnatic, Folk, Devotional, Ghazal, Sufi)
- 06 International
Pop
- 07 International
Hip-Hop/Rap/Trap
- 08 International
Rock
- 09 Soundtracks
(film or TV)
- 10 International
Dance / Electronic / House



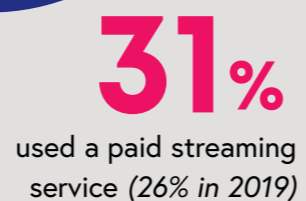
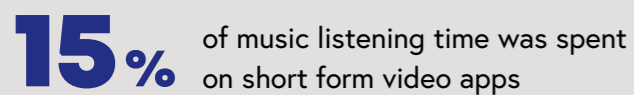
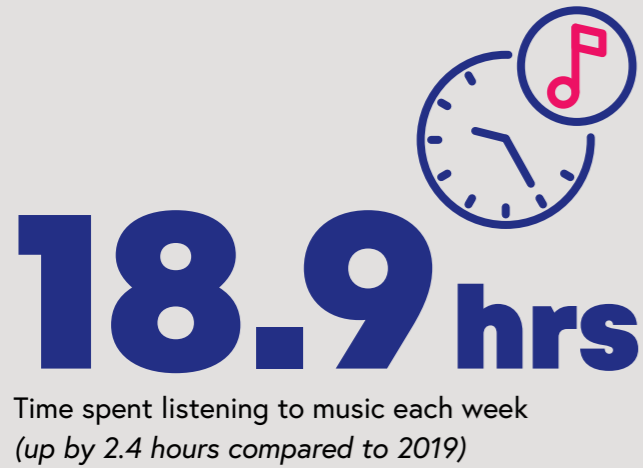


COUNTRY FOCUS

Russia

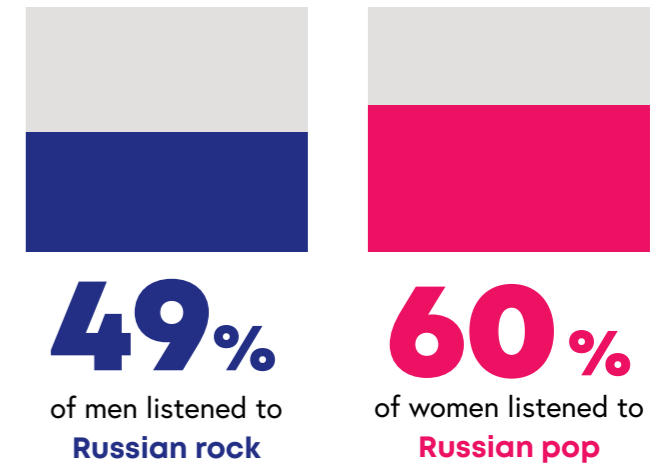
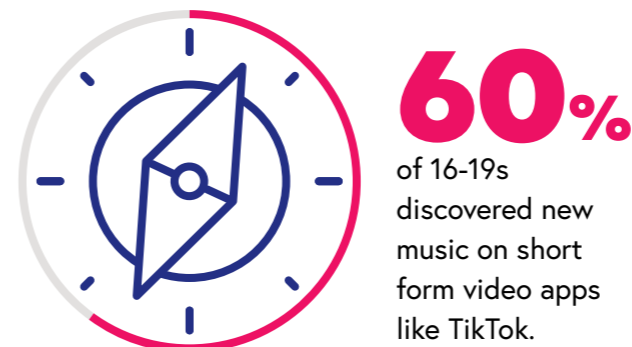


In Russia's fast-developing music market, engagement with licensed streaming services was strong and local music was popular.



Top 10 genres

- 01 Russian Pop
- 02 90s
- 03 International Pop
- 04 80s
- 05 Russian Rock
- 06 International Rock
- 07 Estrada / Russian old Pop
- 08 Soundtracks (film or TV)
- 09 Russian Chanson
- 10 International Dance / Electronic / House



16-24s

