

ifpi | representing the
recording industry
worldwide

ENGAGING WITH MUSIC



2022



Insight and analysis

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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 RECORD MUSIC, CAMPAIGN FOR THE RIGHTS OF RECORD PRODUCERS AND EXPAND THE COMMERCIAL USES OF RECORD MUSIC AROUND THE WORLD.

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METHODOLOGY

IFPI's *Engaging with Music 2022* 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 16–44-year-olds in China, India, Indonesia, and Nigeria. As in 2021, 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 and Nigeria are not included in global figures as the countries were newly added to the survey in 2022. Case studies for each of these four countries are provided at the end of this report.

In 2021, IFPI's analysis included results from Russia. This country was not included in the study in 2022. Because of this, any trending between 2021 and 2022 is between the nineteen countries used for the global figure in 2021 and, for 2022, the same countries excluding Russia.

In total, over 44,000 internet users were surveyed with higher numbers of respondents in larger markets. Samples of 1,000, 2,000, or 4,000 respondents per market 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.

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

The 22 countries surveyed accounted for 89% of global recorded music market revenues in 2021. Fieldwork took place between June and September 2022.

INTRODUCTION



"MUSIC HAS THE UNIQUE POWER TO ENTERTAIN US, INSPIRE US, CONSOLE US, AND EVEN HEAL US."

This global report, *Engaging with Music 2022*, demonstrates the central role music plays in enriching so many different parts of our lives.

Based on research conducted with more than 44,000 music fans across 22 countries, this is the largest music study of its kind. It shows how music engagement is thriving, driven by new genres, new formats and an increasingly rich mix of new ways that people can engage with music today.

One of the most exciting, burgeoning areas on which this report shines a light is music's evolving role in boosting our mental and physical well-being, soundtracking activities from running to meditation and beyond.

It also demonstrates the continuing power of local genres, and the impressive breadth of music that is consumed across the globe: from the continuing popularity of K-pop, C-pop, and J-pop, to Afrobeats, and the enduring power of Pop and Hip-Hop.

The report also examines the importance of music in shaping our engagement with film and television and creating completely new experiences within gaming platforms.

However, despite the wide array of licensed services available to music fans, unauthorised use of creators' content stubbornly persists. This harms those who create and invest in music and disrupts the healthy ecosystem that enables both emerging and established artists to achieve creative and commercial success.

As IFPI and its member record companies continue to work to tackle the issue of content protection, this report serves as a healthy reminder of the true global importance and value of music, and the need to protect and support it.

None of this would be possible without record companies and their passion for, and continued investment in, great artists and their music. After all, it is record companies that discover and support new artists, help develop music technology innovations and license new and emerging music services that strengthen the connection between artists and fans.

We hope that you enjoy exploring the ways in which people engage with and delight in music in every corner of the world.

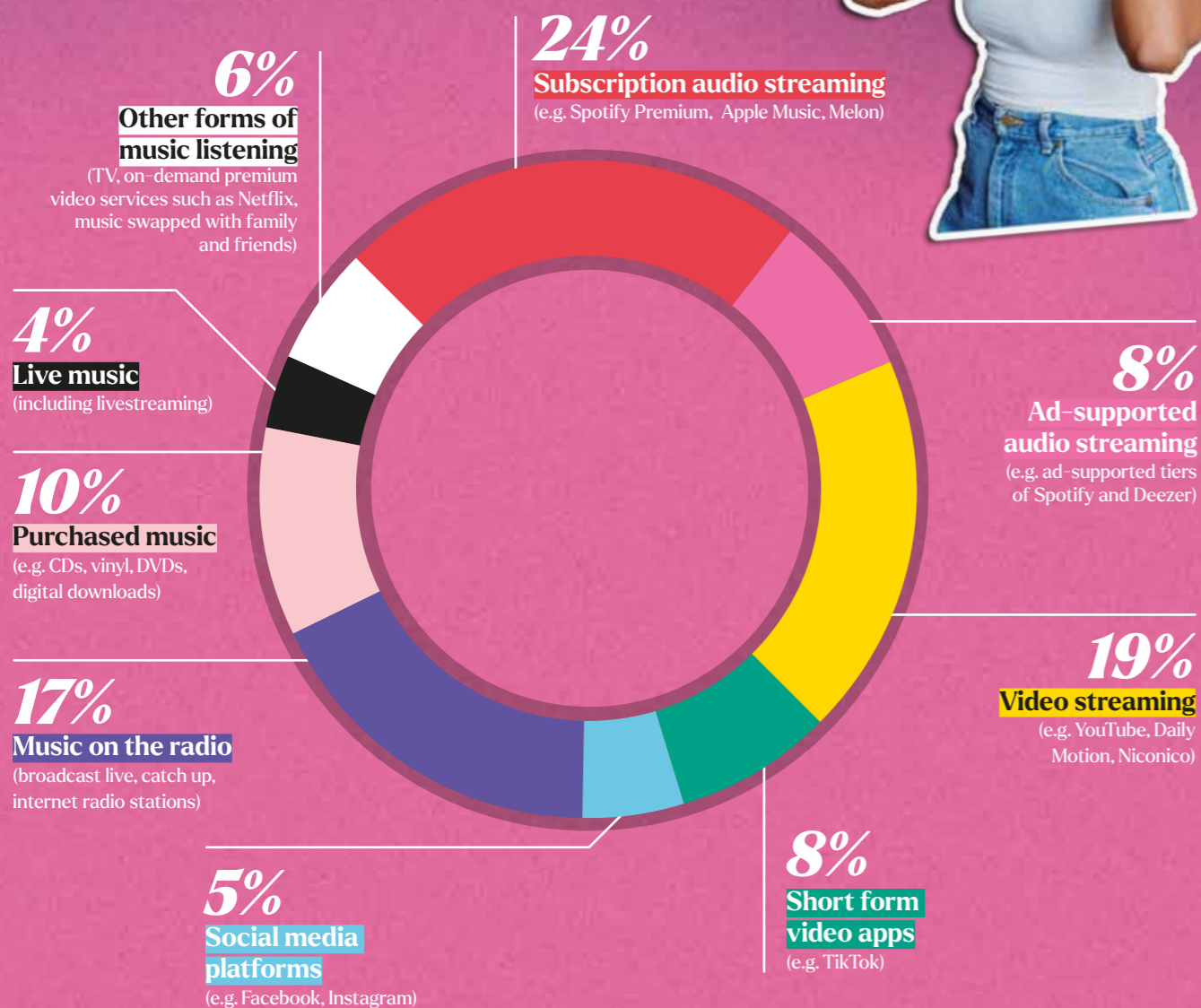
Frances Moore
Chief Executive, IFPI

A GLOBAL SNAPSHOT OF MUSIC ENGAGEMENT IN 2022

BASED ON RESEARCH CONDUCTED BY IFPI ACROSS 22 OF THE WORLD'S LEADING MUSIC MARKETS, THIS REPORT HIGHLIGHTS PEOPLE'S CONTINUED APPETITE AND PASSION FOR MUSIC, SHINING A LIGHT ON THE PIVOTAL ROLE IT PLAYS IN SO MANY DIFFERENT AREAS OF OUR LIVES.



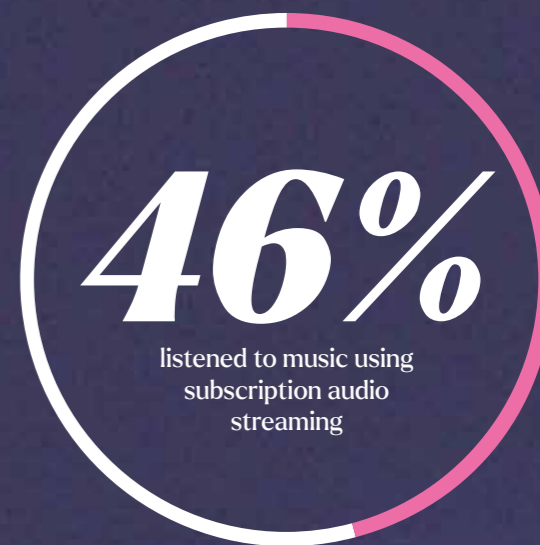
THE MUSIC ENGAGEMENT MIX



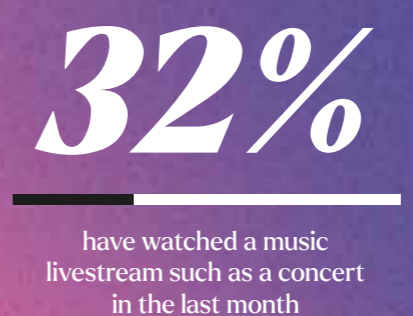
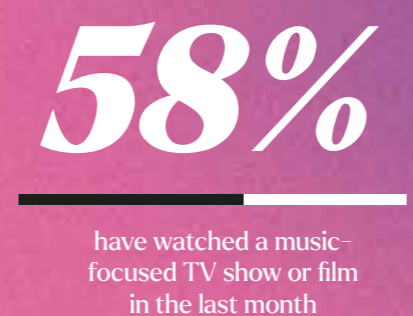
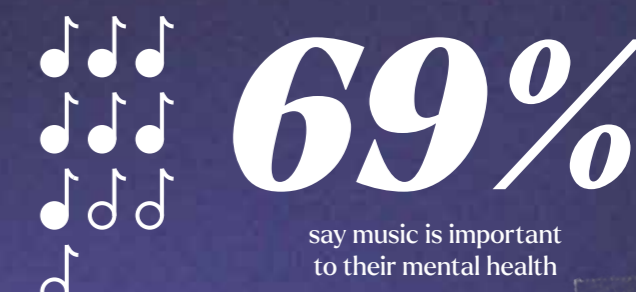
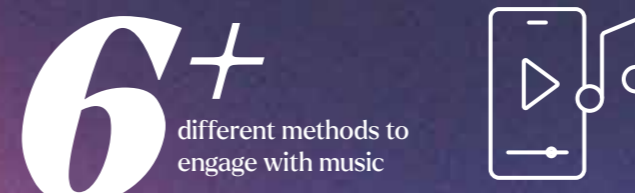
20.1 hours

Time spent listening to music each week (up from 18.4 hours in 2021)

That's the equivalent of listening to an additional 34 3-minute songs per week in 2022



On average, people use



SUBSCRIPTION AUDIO REMAINS POPULAR AROUND THE WORLD

PAID SUBSCRIPTION AUDIO STREAMING CONTINUES TO GROW ACROSS THE GLOBE, DRIVEN BY LISTENERS DESIRE TO SEARCH FOR AND LISTEN TO THEIR FAVOURITE SONGS AND ARTISTS, ADVERTISEMENT FREE AND ON DEMAND.



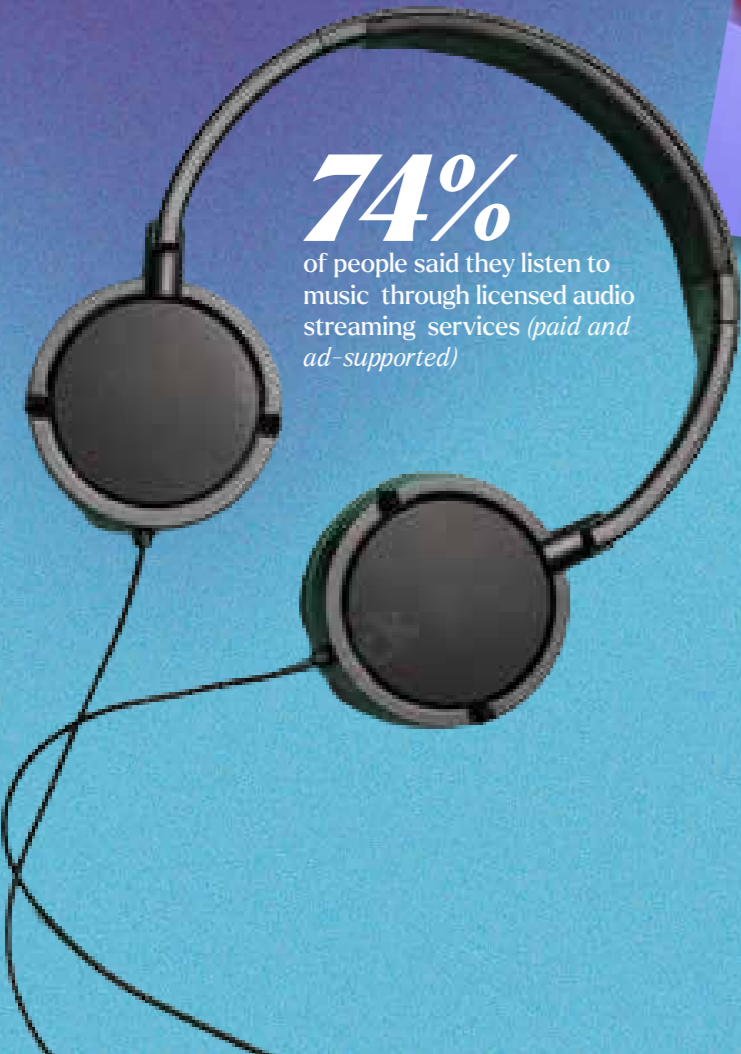
74%

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



▲ 10%

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



THE TOP THREE REASONS

The top three reasons why people subscribed to a music streaming service focused 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**

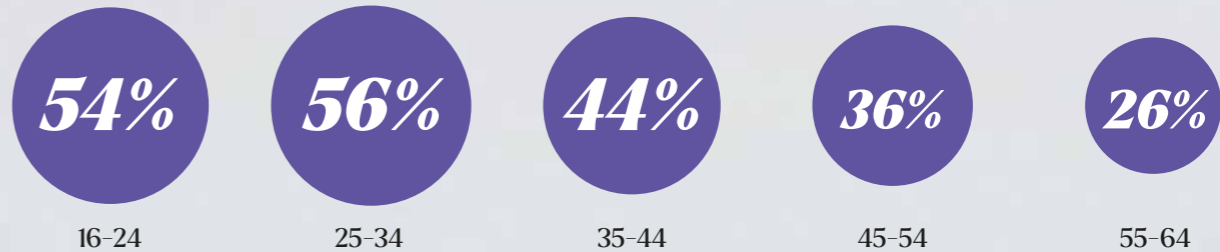
TOP 5 COUNTRIES MOST ENGAGED WITH PAID SUBSCRIPTION

	1. SWEDEN	56%
	2. UK	52%
	3. USA	51%
	4. GERMANY	51%
	5. MEXICO	50%

(In the last month)



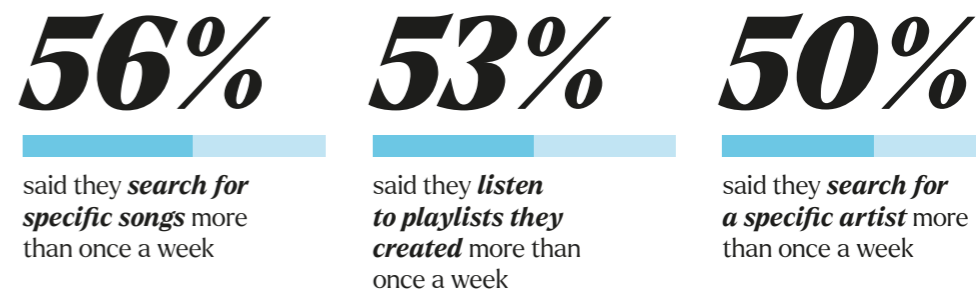
THE USE OF SUBSCRIPTION AUDIO STREAMING WAS HIGHEST IN YOUNGER DEMOGRAPHICS



(In the last month)

LISTENERS ENJOYED THE ABILITY TO CHOOSE FROM THE MILLIONS OF LICENSED TRACKS AVAILABLE ON STREAMING SERVICES

The top three ways in which people chose music more often focused on access to the vast and rich library of music available than the curation offered by streaming services:

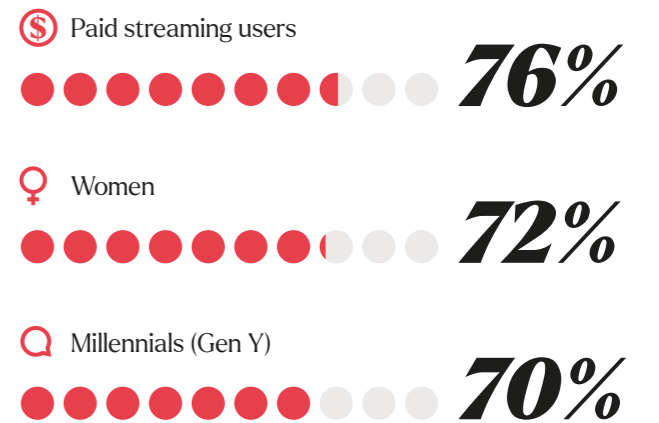


MUSIC IS INTEGRAL TO PEOPLE'S MENTAL AND PHYSICAL WELLBEING

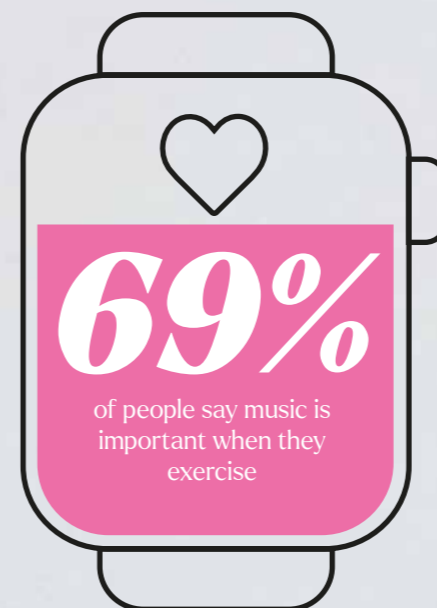
AROUND THE WORLD, MUSIC CONTINUES TO PLAY AN INCREASINGLY IMPORTANT ROLE IN PEOPLE'S WELLBEING - BOTH IN TERMS OF SUPPORTING OUR MENTAL HEALTH, BUT ALSO SOUNDTRACKING AND MOTIVATING OUR PHYSICAL ACTIVITY.



▶ THIS WAS HIGHEST IN:



▶ MUSIC PLAYS A FUNDAMENTAL ROLE IN SOUNDTRACKING OUR PHYSICAL ACTIVITIES



People that use music to soundtrack their chosen physical activity:



88%
Running



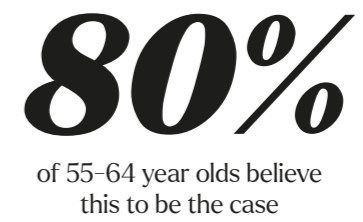
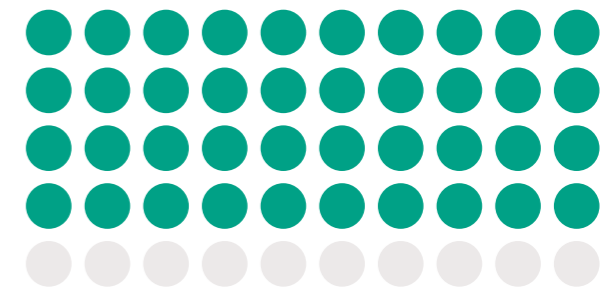
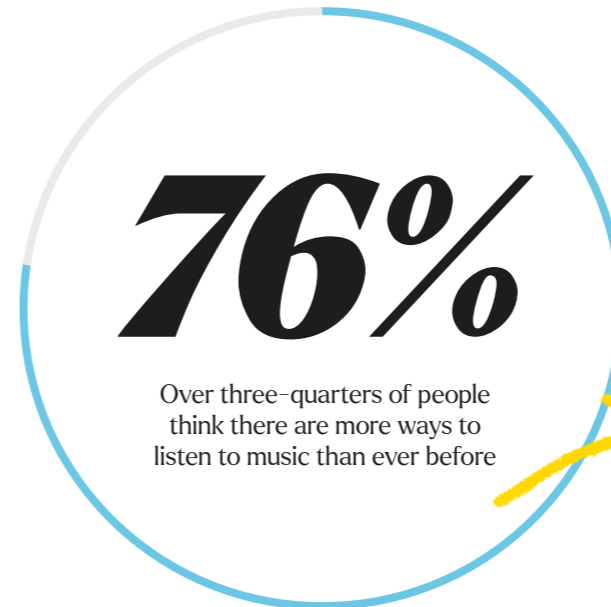
83%
Yoga



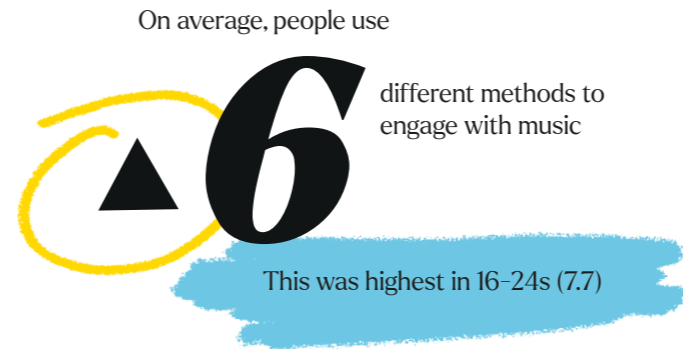
73%
Cycling

THERE ARE MORE WAYS THAN EVER FOR PEOPLE TO ENGAGE WITH MUSIC TODAY

FANS ARE ENGAGING WITH MUSIC IN GROWING AND DIVERSE WAYS - FROM THE CONTINUING POPULARITY OF SHORT-FORM VIDEO TO IN-GAME EXPERIENCES.



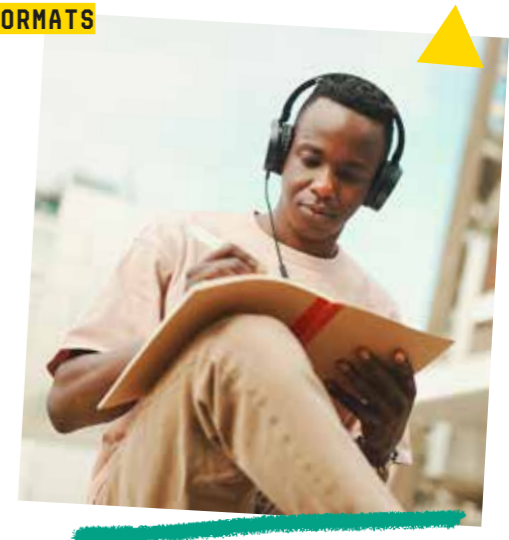
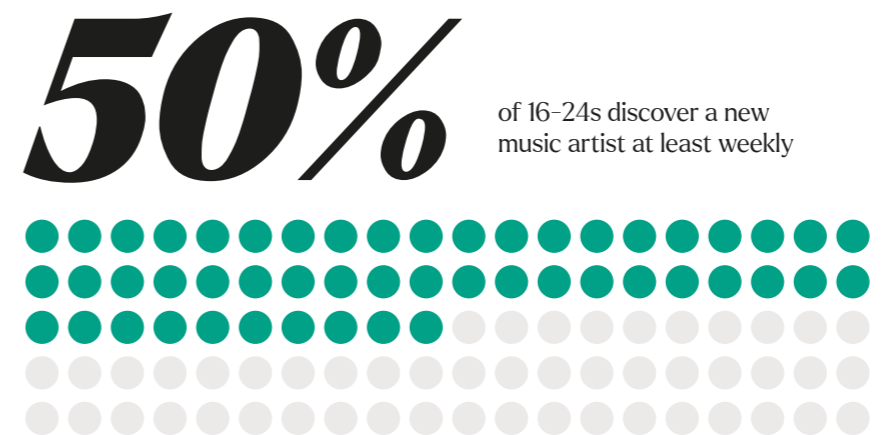
80% of 55-64s - This figure is higher in older generations who have experienced the growth and evolution of music listening habits



▶ THE TOP 5 WAYS THAT PEOPLE ENGAGE WITH MUSIC ARE:

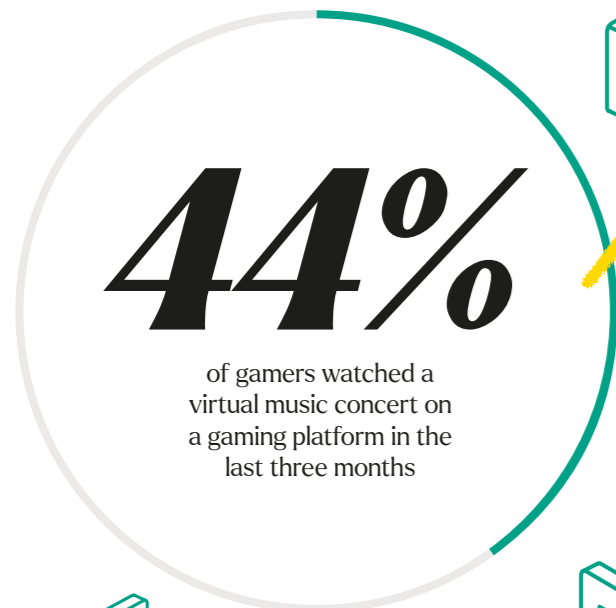
	1. VIDEO STREAMING	82%
	2. AUDIO STREAMING	74%
	3. RADIO	71%
	4. SHORT FORM VIDEO	68%
	5. SOCIAL MEDIA	49%

▶ FANS ARE EXCITED TO DISCOVER THE ENORMOUS RANGE OF NEW MUSIC THAT IS RELEASED EACH WEEK ACROSS A WIDE VARIETY OF FORMATS



A CONTINUED LOOK AT THE DIFFERENT WAYS PEOPLE ARE ENGAGING WITH MUSIC

MUSIC CONTINUES TO PLAY AN IMPORTANT ROLE IN PEOPLE'S GAMING HABITS



21%
of all 16-24s watched a virtual music concert on a gaming platform in the last three months



SHORT FORM VIDEO CONTINUES TO PROVE POPULAR

50%
of people use short form video apps

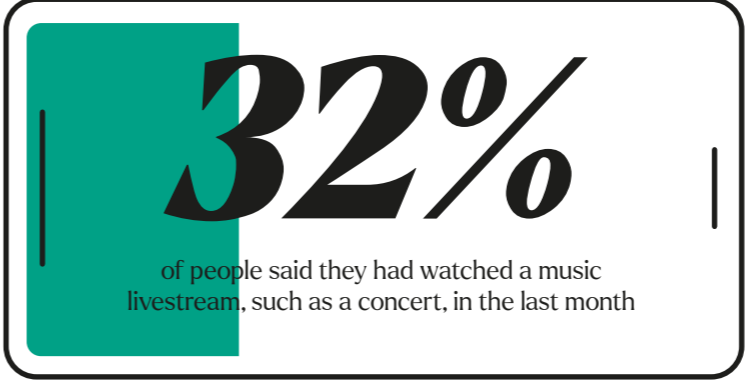
63%
Music was central to 63% of all the time spent watching videos on short form video apps.

TOP 5 COUNTRIES WITH MOST SHORT FORM VIDEO APP USERS

	1. SOUTH AFRICA	78%
	2. MEXICO	78%
	3. BRAZIL	71%
	4. ARGENTINA	66%
	5. NEW ZEALAND	55%

(Usage in the last month)

LIVESTREAMED CONCERTS CONTINUE TO PROVE POPULAR

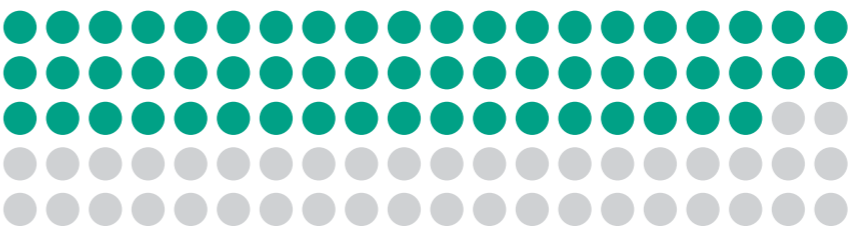


THIS ENGAGEMENT WAS HIGHEST IN

	1. BRAZIL	58%
	2. MEXICO	54%
	3. SOUTH AFRICA	53%
	4. ARGENTINA	46%
	5. SOUTH KOREA	37%

MUSIC PLAYS A VITAL ROLE IN WHAT PEOPLE ARE WATCHING AROUND THE WORLD

58%
of people have watched a music-focused TV show or film in the last month



THE MOST POPULAR GENRES AROUND THE WORLD

ACROSS 34,000 RESPONDENTS IN EIGHTEEN COUNTRIES, OVER 500 DIFFERENT GENRES WERE NAMED BY AT LEAST ONE PERSON AS THE MUSIC THEY TYPICALLY LISTEN TO - INCLUDING DANGDUT', 'DISCO POLO' AND 'SERTANEJO' - REFLECTING THE RICH AND DIVERSE MUSIC LANDSCAPE FANS NOW ENJOY AROUND THE WORLD.



Overall, people listen to an average of 8 genres of music



The number of favourite genres is highest in those most engaged with music such as people who subscribe to audio streaming and those who buy vinyl: both groups listen to

9 genres on average

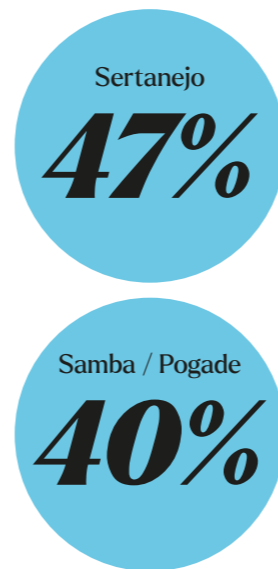


▶ LOCAL GENRES ARE CONSISTENTLY POPULAR ACROSS THE WORLD

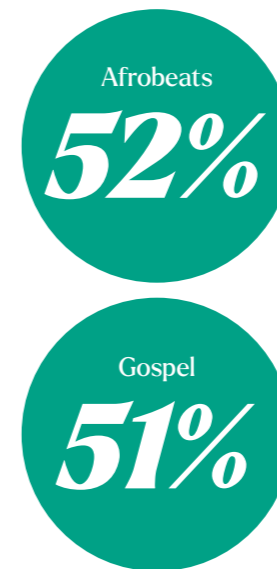
For instance:



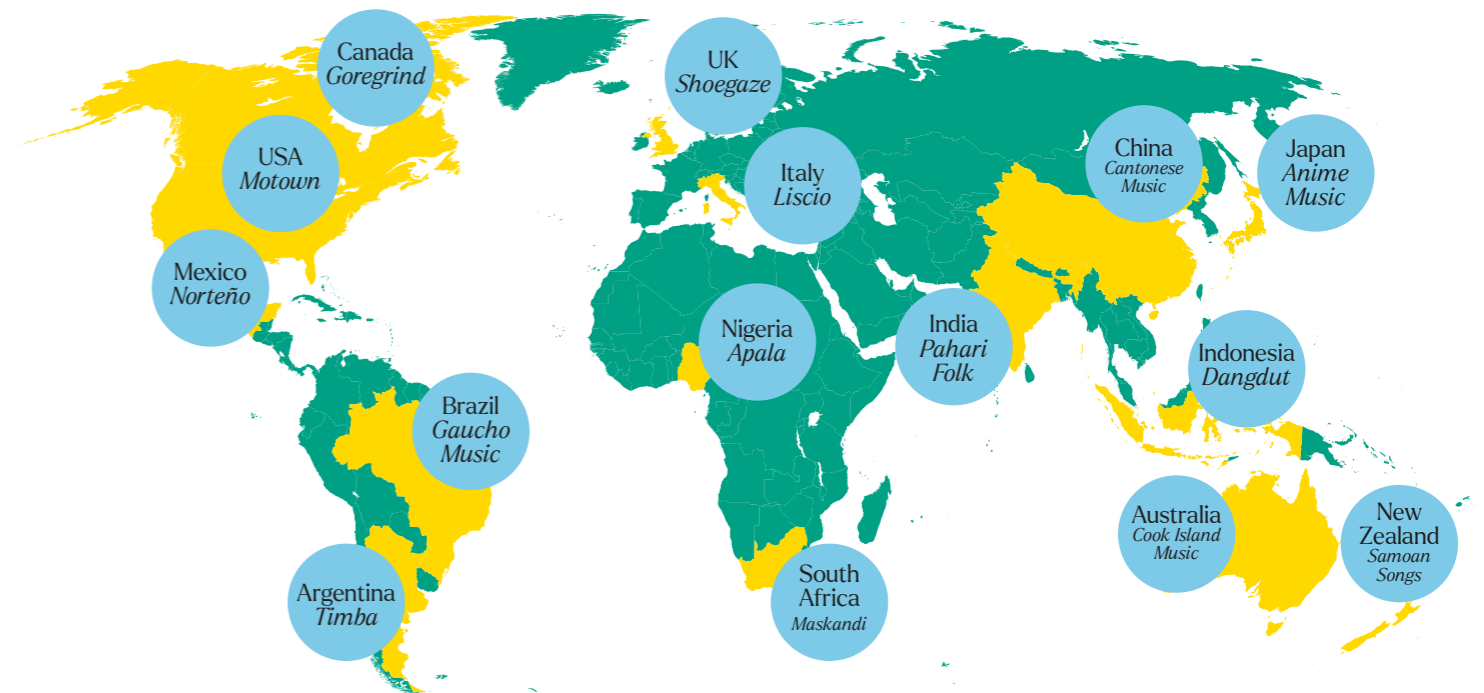
BRAZIL:



NIGERIA:



▶ HERE ARE JUST SOME OF THE 500+ GENRES IDENTIFIED AS BEING ENJOYED BY MUSIC FANS ALL OVER THE WORLD



▶ TOP 10 FAVOURITE GENRES GLOBALLY:

1. Pop
2. Rock
3. Hip-hop / Rap
4. Dance / Electronic
5. Latin
6. Classical / Opera
7. R&B
8. Soundtracks
9. Country
10. Reggae

RADIO CONTINUES TO PROVE POPULAR, WITH MUSIC DRIVING PEOPLE'S ENGAGEMENT

THE ENDURING POPULARITY OF RADIO CONTINUES, AND MUSIC REMAINS THE KEY REASON FOR PEOPLE TO TUNE IN TO THEIR FAVOURITE STATIONS AROUND THE WORLD.



MUSIC FUELS ENGAGEMENT WITH RADIO

73%

Listen to the radio mainly for the music

67%

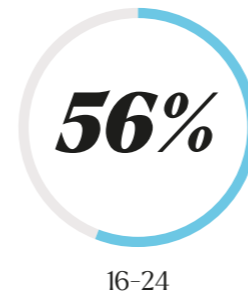
Tune into their favourite radio station because of the music it plays

63%

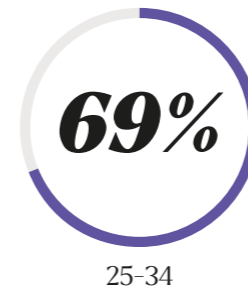
Said without music they wouldn't listen to the radio

ALL AGE GROUPS REPORTED STRONG ENGAGEMENT WITH RADIO

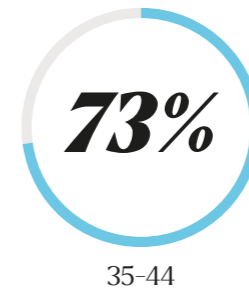
(Last month)



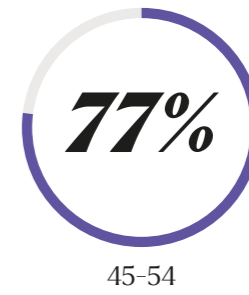
16-24



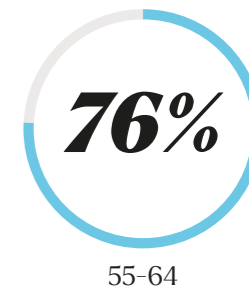
25-34



35-44



45-54



55-64

MUSIC IS STILL FUNDAMENTALLY IMPORTANT TO RADIO'S OFFERING TO ITS LISTENERS



84%

If the radio no longer played music, 84% of radio listeners would then seek music elsewhere, most often through a subscription streaming service

MUSIC PURCHASING ACROSS THE GLOBE

PEOPLE AROUND THE WORLD CONTINUE TO BUY PHYSICAL MUSIC.

12% purchased a CD in the last month



8% purchased vinyl in the last month

THE MOST POPULAR GENRES THAT PEOPLE BUY ON VINYL ARE:



Pop



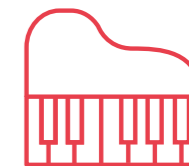
Rock



Hip-Hop



Dance/EDM



Classical / Opera

THE MOST COMMON REASONS PEOPLE HAVE TO BUY VINYL ARE:

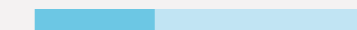
I like physically owning my music

49%



I like the ritual of playing a vinyl record

36%



I want to support my favourite artists by buying the physical album

26%



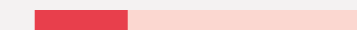
I like having the physical records to look at

41%



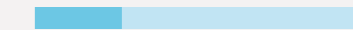
I like immersing myself in a full album

28%



I like reading liner notes

26%



84% of people who buy vinyl purchase new



66% of people who buy vinyl purchase second-hand



ENGAGING WITH UNLICENSED MUSIC

THE AVAILABILITY OF UNLICENSED MUSIC REMAINS AN ISSUE FOR THE WHOLE MUSIC ECOSYSTEM,

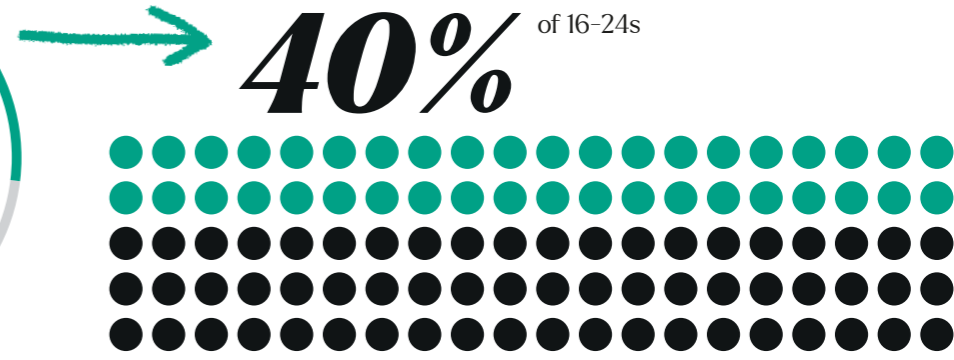
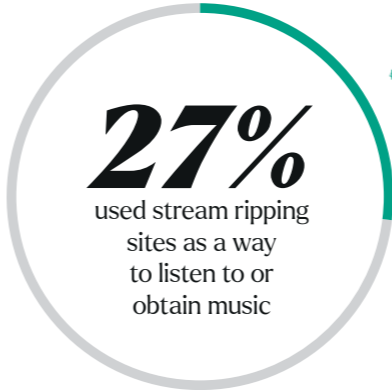
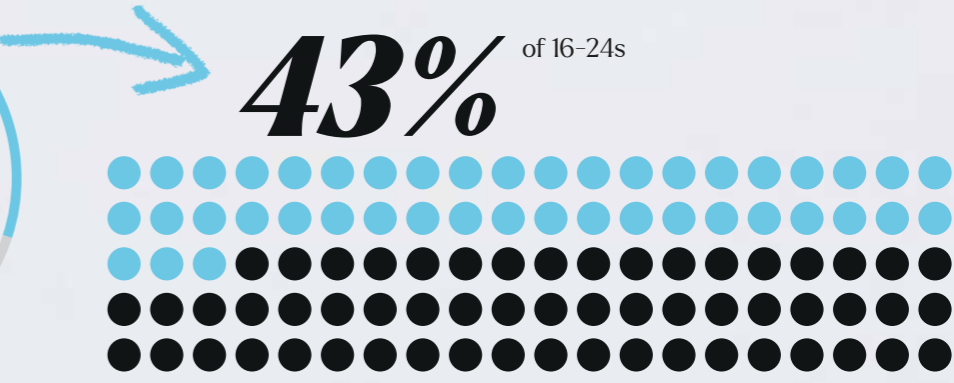


WITH **almost a third** OF PEOPLE REPORTING TO HAVE USED ILLEGAL OR UNLICENSED METHODS TO DOWNLOAD AND LISTEN TO MUSIC.

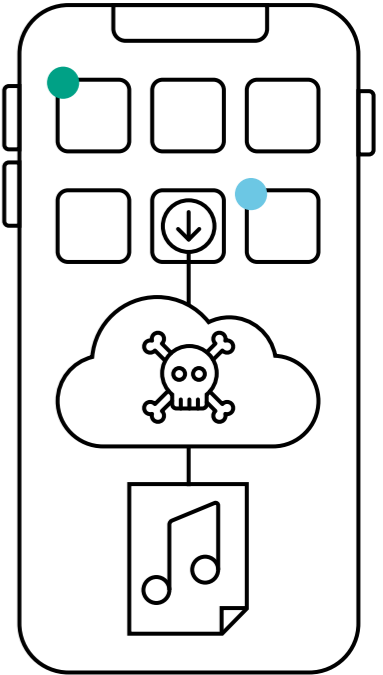


WHAT IS STREAM RIPPING?

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.



17% said they had used an unlicensed mobile app to illegally download music



COUNTRY
FOCUS:
 **INDIA**



▶ **TIME SPENT LISTENING TO MUSIC EACH WEEK**



25.7 hours

 **88%**



Use licensed audio streaming

 **65%**



Use short-form video

 **71%**



Discover a new artist or music weekly

 **67%**

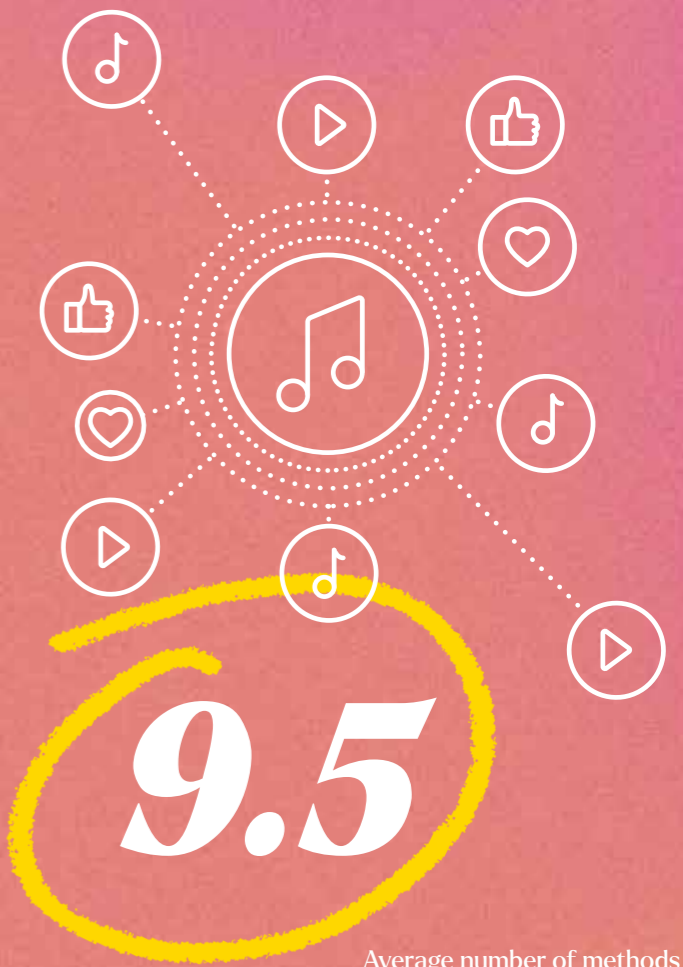


Say music is important to their mental health

 **73%**



Use unlicensed or illegal ways to listen to music



9.5

Average number of methods used to engage with music

▶ **TOP 10 GENRES:**

1. Bollywood (modern)
2. Bollywood (classic)
3. Bollywood New Age (2000-2020)
4. Indian Hip-Hop / Rap
5. Bollywood Coming of Age
6. Punjabi
7. Indian Pop
8. Hip-Hop / Rap
9. Bollywood Retro
10. Dance / Electronic

COUNTRY FOCUS:



CHINA



▶ TIME SPENT LISTENING TO MUSIC EACH WEEK



28.3 hours



Use licensed audio streaming



Use short form video



Watched a music livestream in the last three months



Watched music-focused TV show or film in the last month



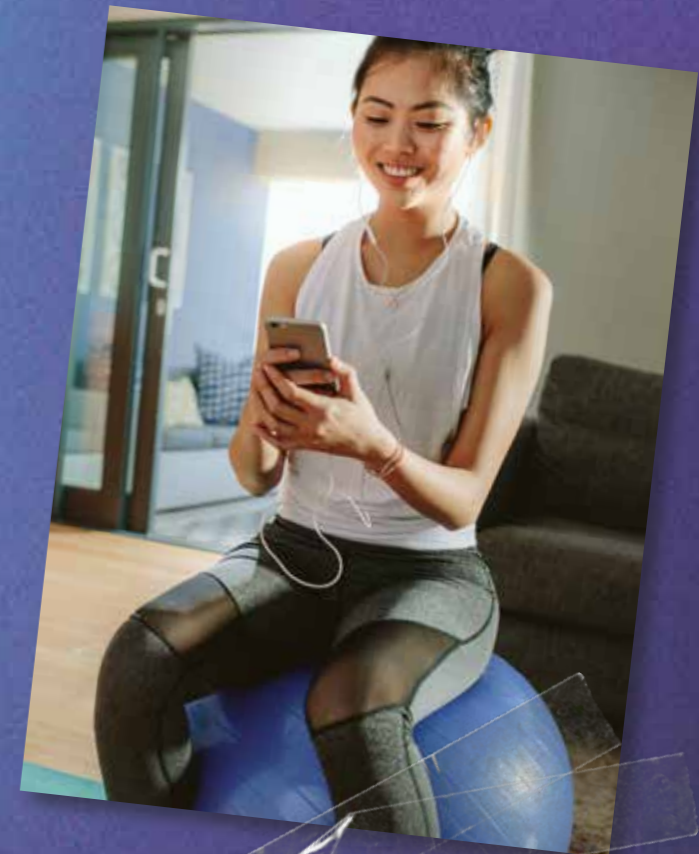
Said music is important to their mental health



Use unlicensed or illegal ways to listen to music

▶ TOP 10 GENRES:

1. C-pop
2. Pop
3. Easy Listening
4. Anime / Anisong
5. Chinese Style
6. Chinese Folk
7. Classical
8. Soundtracks
9. Chinese Hip-Hop / Rap
10. K-Pop



COUNTRY FOCUS:

INDONESIA



▶ TIME SPENT LISTENING TO MUSIC EACH WEEK



27.2 hours



Use licensed audio streaming



Use short form video



Watched a music livestream in the last three months



Watched music-focused TV show or film in the last month



Said music is important to their mental health



Use unlicensed or illegal ways to listen to music



9.6

Average number of methods used to engage with music

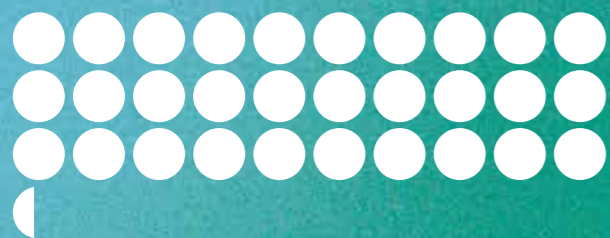
▶ TOP 10 GENRES:

1. Indonesian Pop
2. Pop
3. K-pop
4. Dangdut
5. Islamic Music
6. Hip-Hop / Rap
7. Rock
8. Classical
9. R&B
10. Jazz

COUNTRY FOCUS: NIGERIA



▶ TIME SPENT LISTENING TO MUSIC EACH WEEK



30.4 hours

88%

Use licensed audio streaming

64%

Discover a new artist or music weekly

85%

Use short form video

64%

Watched a music livestream in the last three months

87%

Watched music focused TV show or film in the last month

82%

Said music is important to their mental health

88%

Use unlicensed or illegal ways to listen to music

87%

Said they feel proud when an artist from Nigeria is globally successful

▶ TOP 10 GENRES:

1. Afrobeats
2. Gospel
3. Nigerian Hip-Hop / Rap
4. Hip-Hop / Rap
5. Nigerian Pop
6. Christian Music
7. Afrobeat
8. Blues
9. R&B
10. African



10.2

Average number of methods used to engage with music



representing the
recording industry
worldwide