Indicators of music diversity on streaming platforms
2021

Introduction

The *Centre national de la musique*'s mission

Under the terms of Article 1 of the French Law n°2019-1100 of October 30, 2019, relating to the creation of the *Centre national de la musique*, the public institution's mission is to "**manage an observatory of the economy and compile data for the entire sector** and, as such, **collect all useful information,** in particularly related to business and financial aspects, and **disseminate economic and statistical information**, in compliance with legislation relating to the protection of personal data and trade secrets."

Restructuring and expanding the observatory

In June 2020, the CNM entered into a **joint consultation** aimed at allowing **all stakeholders** (artists, producers, music publishers, broadcasters and their representatives, collective management organisations such as State services) to **work towards building the new tools needed to restructure and expand its observatory on music diversity in all its forms,** a result long strived for. **Industry representatives** traditionally associated with the music diversity observatory's "radio and TV committees", now **extended to representatives from phonographic and digital production**, have helped build a **series of shared indicators.**

Encompassing all its aspects - from upstream (production) to downstream (broadcasting and consultation). **music diversity now covers phonographic production, radio, television, and music and video streaming.**

It is measured in terms of:

• Song and artist diversity
• Exposure of French-speaking and French-produced works
• The breakdown of music genres
• The creation of new works
• Business model diversity

Introduction

Implementing a new mechanism for observation

In accordance with Articles R2124-2 and R 2124-3 of the French Public Procurement Code, **a formal tendering procedure was launched in March 2021**, for services divided into "lots", each covering a different topic, which could be supplied by different service providers.

The restructuring and expansion of the topics into panels had to meet the following **dual objective**:

- **to maintain the same level of quality across all the identified topics** based on objective technical criteria,

- **to contain such expansion** within a controlled budgetary context.

Establish a monitoring committee

A monitoring committee **consisting of an equal share of representatives from each sector** was established.

Made up of **49 members** representing the State, artists, publishers, collective management organisations, record producers, representatives from radio and television broadcasting sectors, and online music streaming services, the monitoring committee calls on its sector-specific expertise to cover all of the identified topics.

The committee is **an essential link in the smooth running of the study**, and it directs all **recommendations necessary for the observatory to develop.**

Methodology and precautions

A sample group of five music streaming platforms

Period
2021

Sample group
Spotify, Deezer, Apple Music, Qobuz, Napster

Geographic scope
All streams in France including content from all countries.

Musical scope
Aggregated **top 1,000** tracks with the most streams on the sample group of streaming platforms.

Duration
As per industry standard, one stream equates to a listening time of at least **30 consecutive seconds**.

Data processing
Duplicate entries and artificial streams have been removed from the data provided by the streaming platforms on songs and artists-performers.

Methodological precautions
The streaming data for some tracks in the aggregated top 1,000 is incomplete: on Apple Music, streaming data is missing for 169 tracks, while on Napster, data is missing for 62 tracks.

The **different types of playlists** were identified from data collected by **Spotify, Deezer and Napster**, the only platforms to have sent us this indicator.

The figures presented hereafter should not be interpreted as a representative segment of the global listening, but rather as Top of the listening on the panel.

Indicators measuring diversity

Music genre: The CNM has identified the following music subgenre categories: Dance-Electro / Groove-R&B / Jazz-Blues / Latino / Classical music / Contemporary music/ Lyric opera music/ Traditional and folk music / Rap / Reggae / Rock-Metal / Pop

Track age category: The notions of new, recurrent and gold have been retained. A track's age will be calculated from its release date on the platform.
- New: less than 12 months
- Recurrent: between 12 and 36 months
- Gold: more than 36 months

Language in which song is sung: Language recognition software is used on the lyrics to determine in which language a track is sung. A song's language representativeness score is as follows:
- French-speaking: if more than 50% of the words are in French
- Instrumental: if the song features no words

Level of artist development: Based on SNEP/UPFI certifications, the list of established artists is drawn up by the CSA and communicated to the CNM. Any artist not on the list will be considered as an emerging artist.

Gender of lead singer: For **exploratory purposes**, the lead singer's gender integrates an array of diversity indicators. It is **calculated using the tone of the voice** (female, male or mixed if several singers, or undetermined) in a song.

Playlist types
- **Users playlist:** playlist of a user subscribed to the music streaming platform.
- **Playlist proposed by the platform**: editorial or algorithmic playlist made available by the platform.
- **Out of playlist**: listening sources other than user playlist or playlist offered by the platform.

Business models
The definition will be reviewed as part of the restructuring of these studies.
- Breakdown of songs by label,
- Breakdown of songs distributed by type of company: majors, independents distributed by majors, independents distributed by independents.

The methodology used has long been disputed on the grounds that independents distributed by majors were considered majors. **Record producer representatives (the SCPP, SPPF, SNEP, UPFI, FELIN, SMA) agree to consult as soon as possible on a suitable definition valid for all the identified areas (production, radio, TV, streaming) for the study on music diversity.**

Number of artists, streams, labels and providers

The top 1,000 tracks with the most streams, created by aggregating data from the 5 platforms, total more than 17.6 billion streams

17.6 bn
streams
for the aggregated top 1,000 tracks

618
Artists

under

269
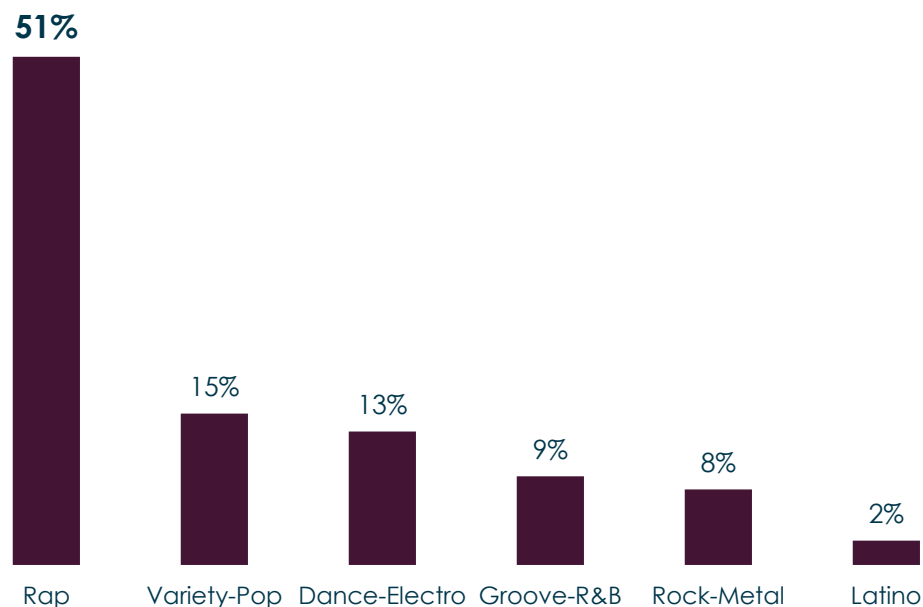**Labels**

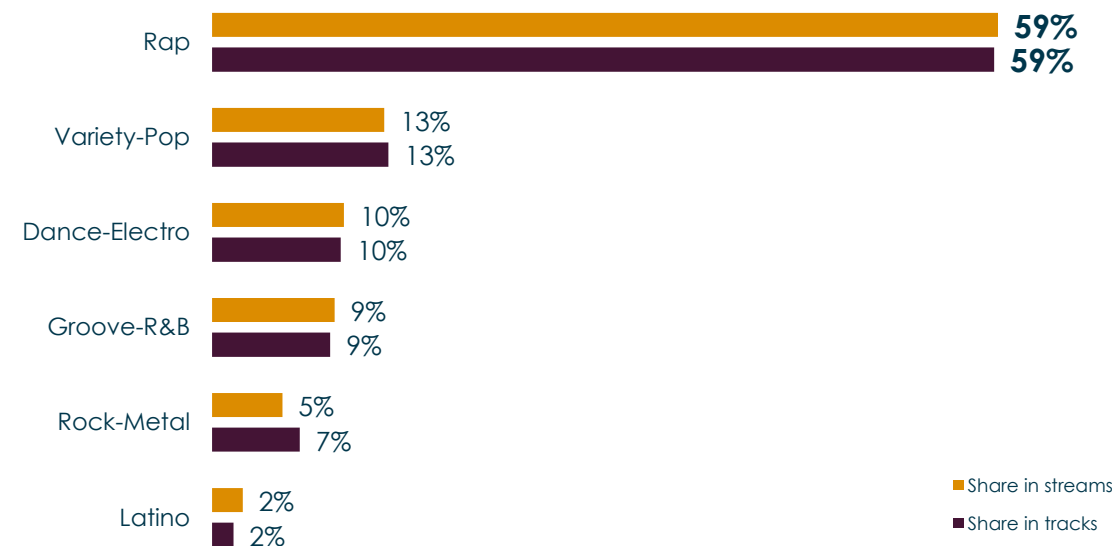whose tracks have been released on the platforms by

20
Distributors

Breakdown by music genre

Rap is the leading genre for the most-streamed artists, as well as for the top 1,000 tracks.
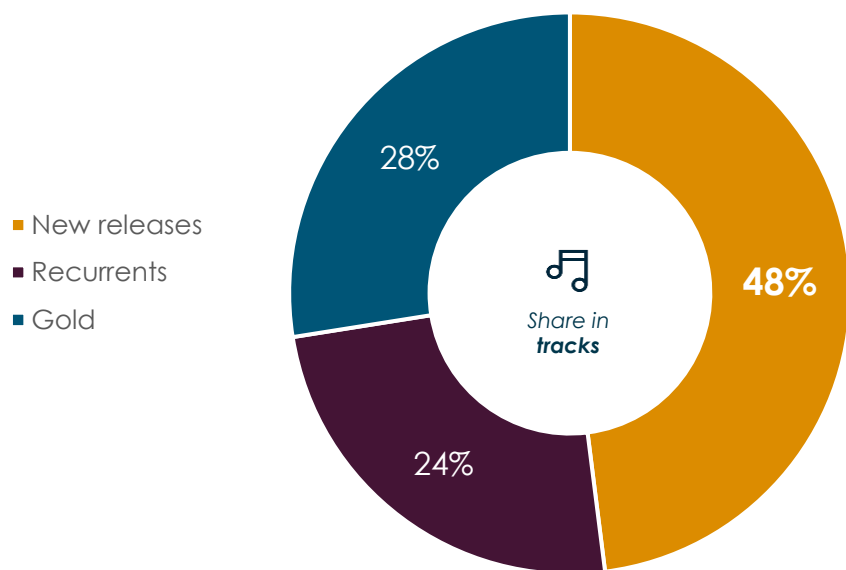

Top artists aggregate

- Rap: 51%
- Variety-Pop: 15%
- Dance-Electro: 13%
- Groove-R&B: 9%
- Rock-Metal: 8%
- Latino: 2%

Aggregated top 1,000 tracks

Genre	Share in streams	Share in tracks
Rap	59%	59%
Variety-Pop	13%	13%
Dance-Electro	10%	10%
Groove-R&B	9%	9%
Rock-Metal	5%	7%
Latino	2%	2%

59%

With **nearly 10.5 billion streams and 590 tracks, rap accounts for more than 59% of the aggregated top 1,000** both in streams and in tracks. 51% of top artists are referenced as rap artists.
The musical genres traditional and world music (3 artists), reggae (3 artists) and jazz-blues (2 artists), have a cumulative total of 9 songs and a low number of streams, and are all three at 0%.
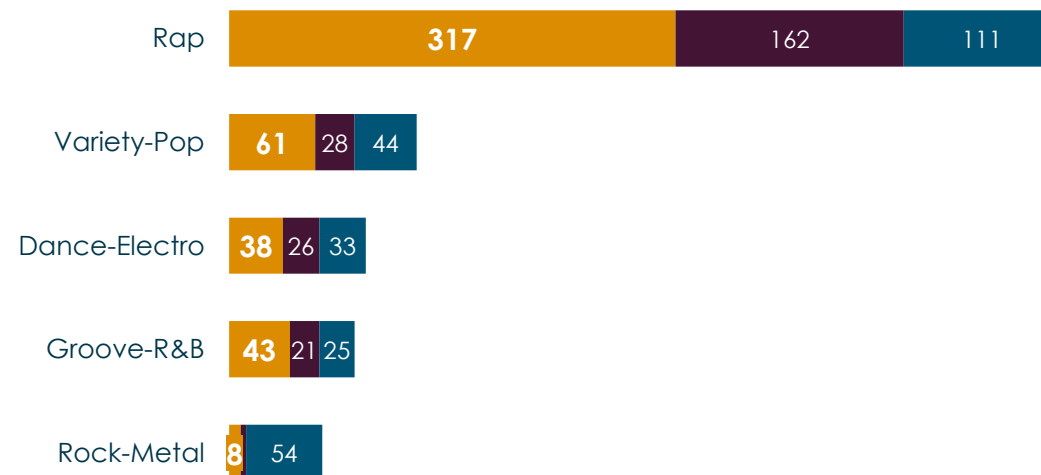
Breakdown by track age category in the aggregate top 1,000 tracks

In terms of number of songs, rap has the most new releases (317 tracks)

48% of songs streamed are new releases

- New releases
- Recurrents
- Gold

48%
28%
24%

Share in tracks

*Breakdown of track age category by music genre share in **tracks***

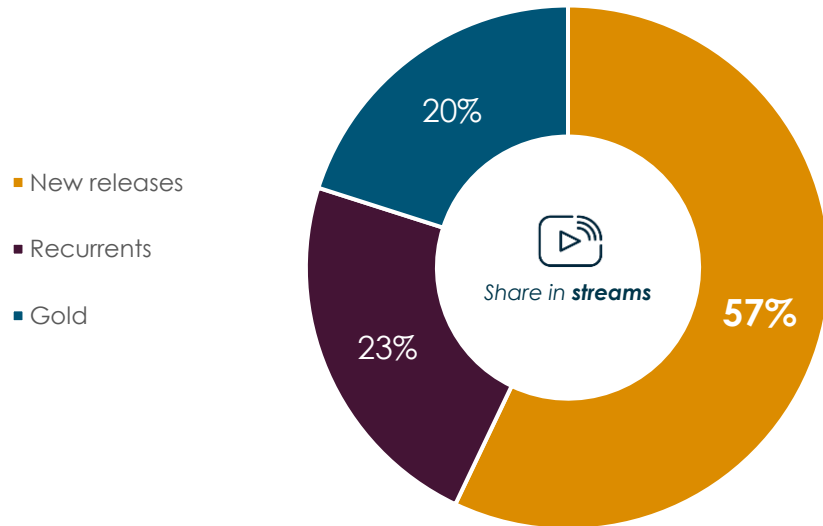| Genre	New releases	Recurrents	Gold
Rap	317	162	111
Variety-Pop	61	28	44
Dance-Electro	38	26	33
Groove-R&B	43	21	25
Rock-Metal	8		54

For each music genre, new releases are the leading category, with the exception of **rock-metal (54 out of 66 tracks are gold)** and **reggae (2 out of the 3 songs are gold)**. **Traditional and world music has 4 songs in the aggregate top 1,000**, including 2 new releases and 2 golds, and **jazz-blues has 2 songs** (one new release and one gold).
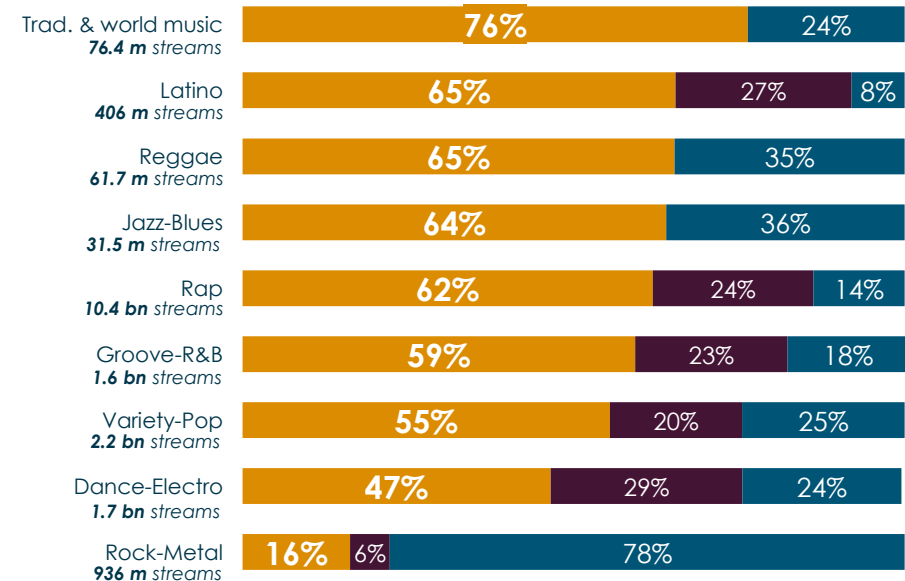
Breakdown by track age category in the aggregate top 1,000 tracks

With the exception of dance-electro and rock-metal, new releases generate more than 55% of streams across all musical genres

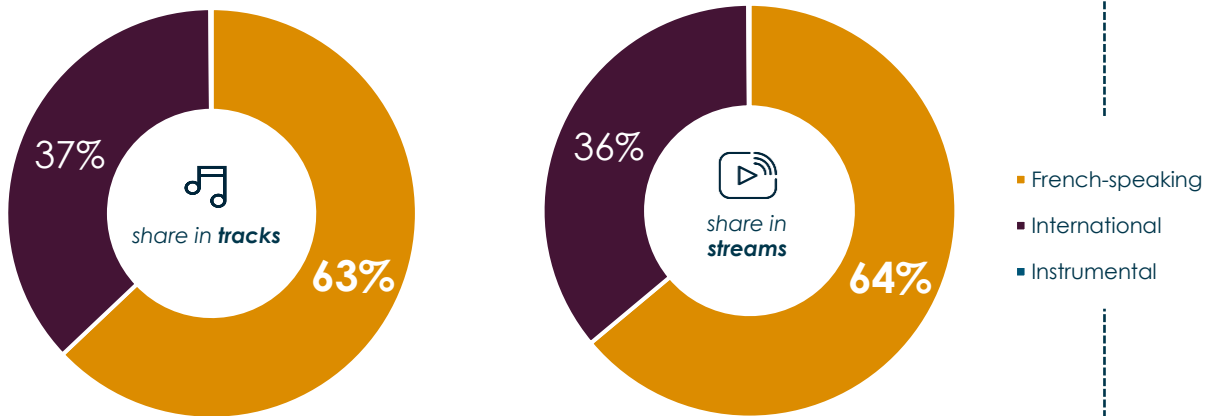**57%** of streams are generated by new releases

- New releases
- Recurrents
- Gold

Share in streams

57%

23%

20%

Breakdown of track age category by music genre
Share in streams

Genre	New releases	Recurrents	Gold
Trad. & world music — 76.4 m streams	76%		24%
Latino — 406 m streams	65%	27%	8%
Reggae — 61.7 m streams	65%		35%
Jazz-Blues — 31.5 m streams	64%		36%
Rap — 10.4 bn streams	62%	24%	14%
Groove-R&B — 1.6 bn streams	59%	23%	18%
Variety-Pop — 2.2 bn streams	55%	20%	25%
Dance-Electro — 1.7 bn streams	47%	29%	24%
Rock-Metal — 936 m streams	16%	6%	78%

cNVI

Breakdown by language in which song is sung in the aggregate top 1,000 tracks

Almost two thirds of streams are sung in French

**Language in which track is sung**

37%

63%

*share in **tracks***

36%

64%

*share in **streams***

Breakdown of track age category by language in which track is sung

- French-speaking
- International
- Instrumental

71% 29% 0% — New releases

65% 35% 0% — Recurrents

41% 58% 1% — Gold

64% of streams relate to **tracks sung in French**

The aggregate top 1,000 only includes one instrumental song. This implies that the total of its streams, compared to the overall volume of the top tracks, results in a share for instrumental music equivalent to 0%.
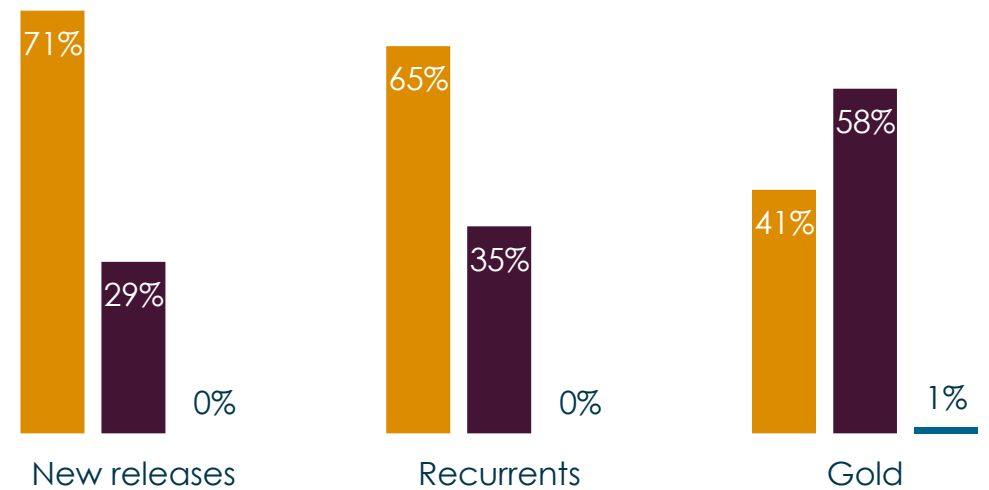
71% **of streams of new releases** are generated by tracks **sung in French**

The one instrumental song has the gold age category. As such, the total of its streams compared to the overall volume of gold streams raises the share of the instrumental music genre to **1%**.
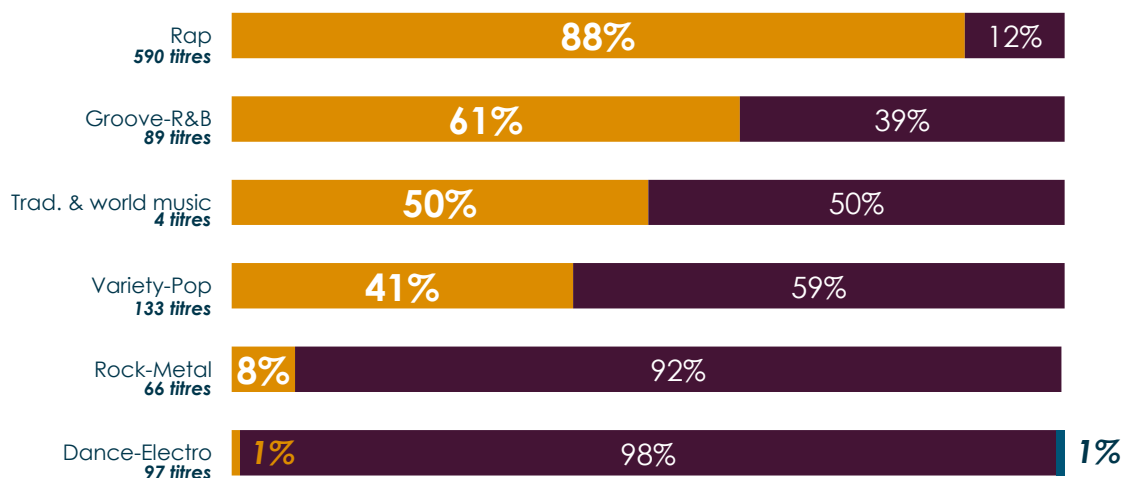
Breakdown by language in which track is sung by music genre

Rap, groove-R&B and traditional and world music are the music genres where tracks sung in French predominate, in terms of the share in tracks and in streams.
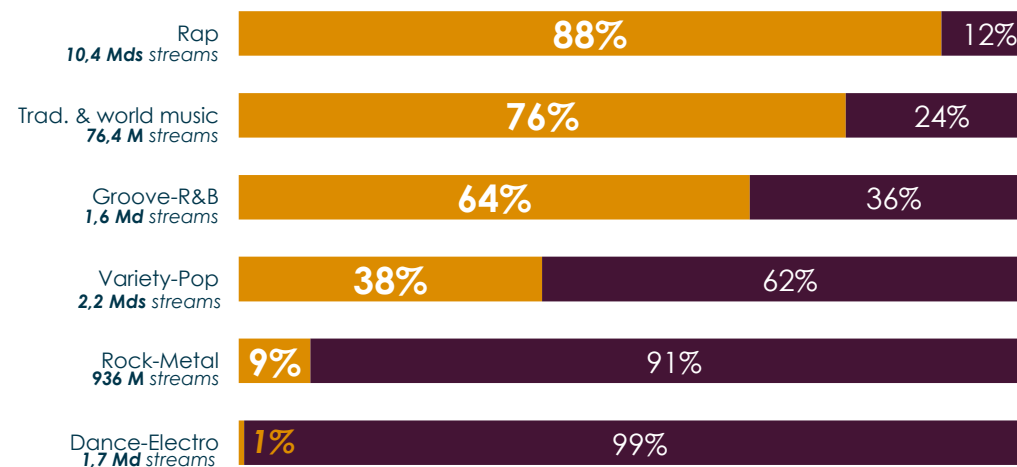
Rap and groove-R&B are the two genres where tracks sung in French are the majority. French-speaking songs are also predominant in terms of streams, as 88% of streams are for tracks sung in French for rap and 64% for groove-R&B.
Traditional and world music features 4 songs including 2 sung in French. These two songs represent 76% of the streams of this music genre.
Jazz-blues, reggae and Latin music only feature songs whose language is listed as "international".

Share in **tracks**

Genre	French-speaking	International	Instrumental
Rap 590 titres	88%	12%	
Groove-R&B 89 titres	61%	39%	
Trad. & world music 4 titres	50%	50%	
Variety-Pop 133 titres	41%	59%	
Rock-Metal 66 titres	8%	92%	
Dance-Electro 97 titres	1%	98%	1%

Share in **streams**

Genre	French-speaking	International
Rap 10,4 Mds streams	88%	12%
Trad. & world music 76,4 M streams	76%	24%
Groove-R&B 1,6 Md streams	64%	36%
Variety-Pop 2,2 Mds streams	38%	62%
Rock-Metal 936 M streams	9%	91%
Dance-Electro 1,7 Md streams	1%	99%

■ French-speaking ■ International ■ Instrumental

cNM

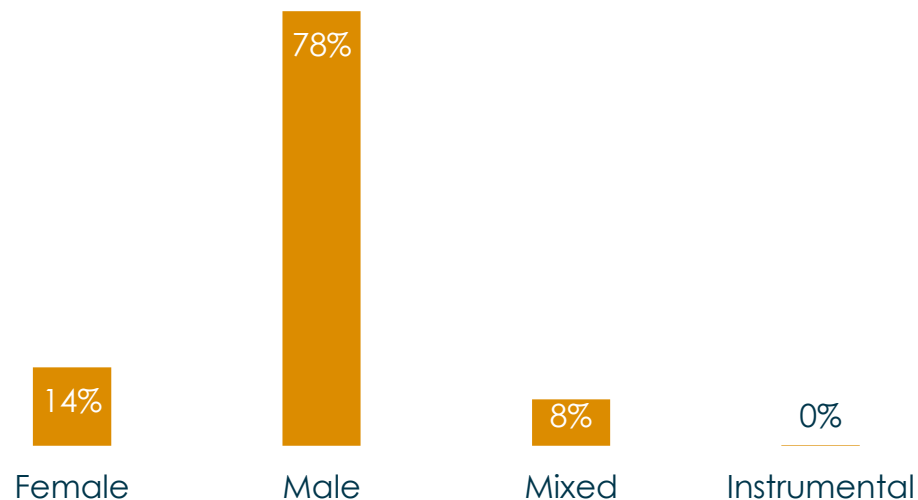*Breakdown of gender of lead singer in the aggregate top 1,000 tracks*

The female vocal tone represents more than 10% of the share in both tracks and streams
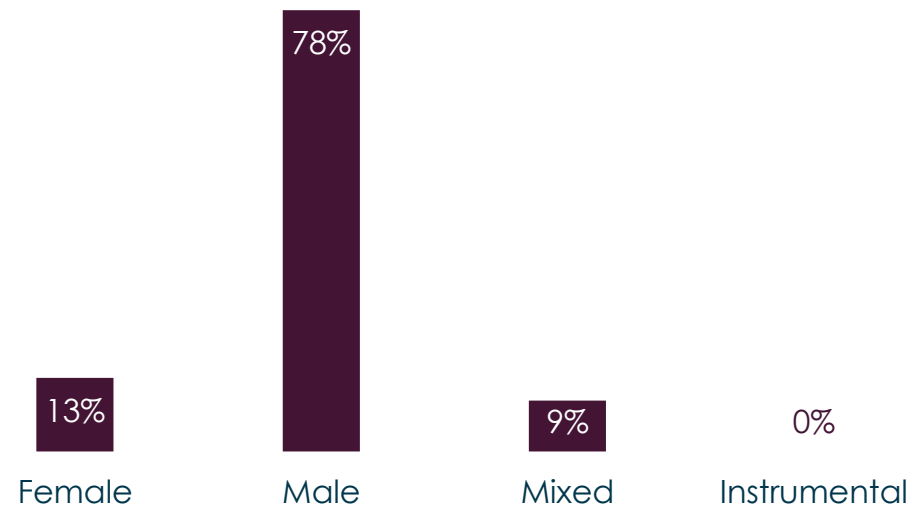
14%

In the aggregate top 1,000 tracks, **140 have a female vocal tone and total more than 2.3 billion streams (13%)**. 83 titles are mixed, i.e. 9% of total streams. The male vocal tone is still largely predominant.

♪ *Gender of lead singer*
*share in **tracks***

Female	Male	Mixed	Instrumental
14%	78%	8%	0%

Gender of lead singer
*share in **streams***

Female	Male	Mixed	Instrumental
13%	78%	9%	0%

Breakdown by level of artist development

For the top artists and the top 1,000 tracks, emerging artists hold the bigger share in terms of tracks and streams.

The top artists aggregate (618) features 341 French-speaking artists (55%) and **84% are emerging acts who account for 62% of streams.**
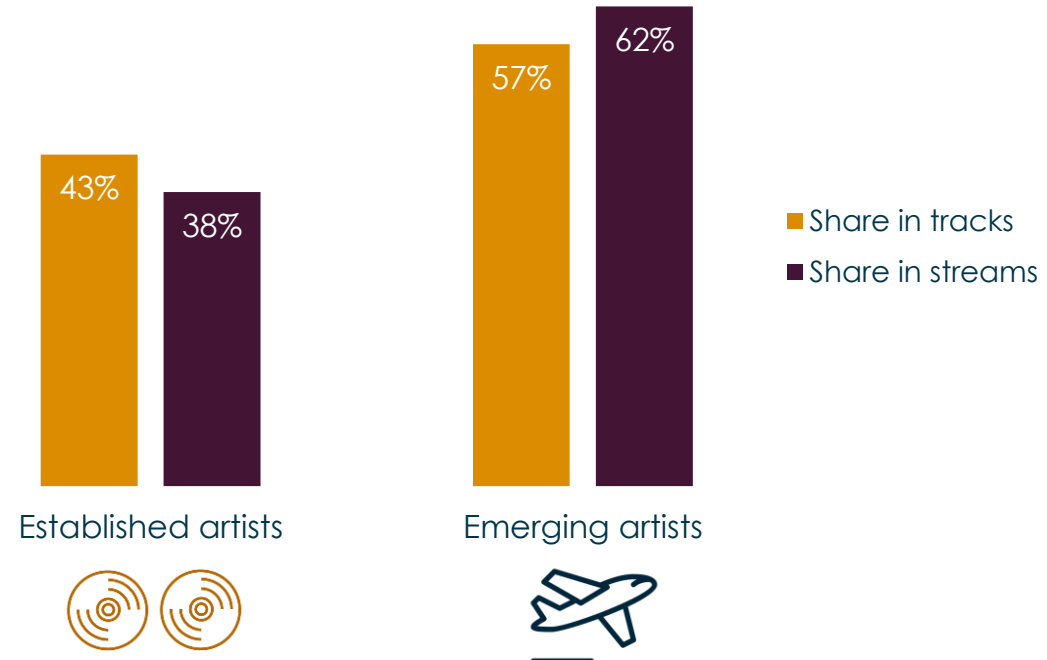
Top artists aggregate

Aggregate top 1,000 tracks

16%
Established artists
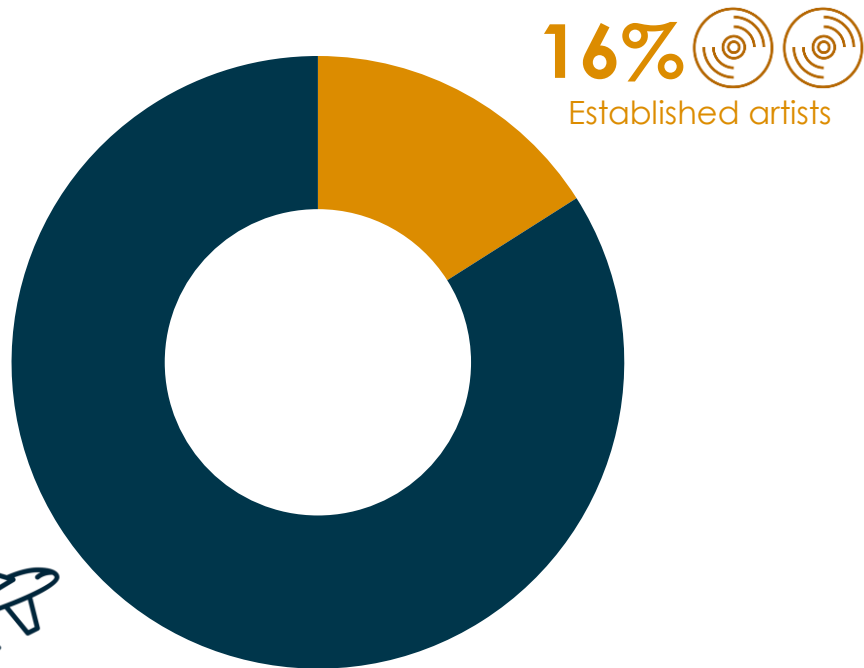
84%
Emerging artists

43% 38%

57% 62%

Established artists

Emerging artists

■ Share in tracks
■ Share in streams

Breakdown of listening source (Deezer, Spotify and Napster only)

An almost equal distribution of streams is observed within the different types of playlists
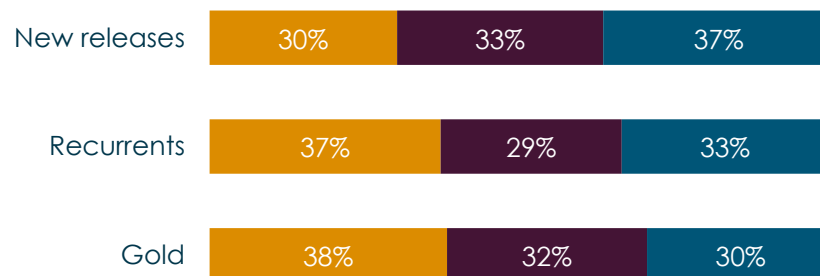
Each type of playlist has **around a third** of streams

Playlist type
*Share in **streams***

Most **new releases** are listened to **out of a playlist** (37%) while recurrent and golds are mainly consumed via users playlists (37% and 38%)
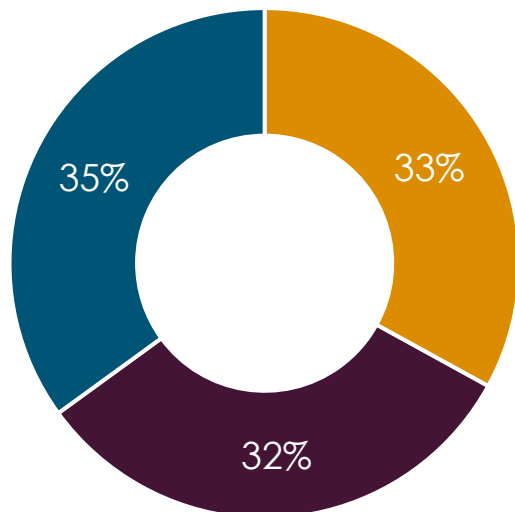
Track age category

■ Users playlists

■ Platform proposed by the platform

■ Out of playlist

French-language songs are mainly listened to **independently of a playlist** (39%) and the **international repertoire** in platform playlists (40%)
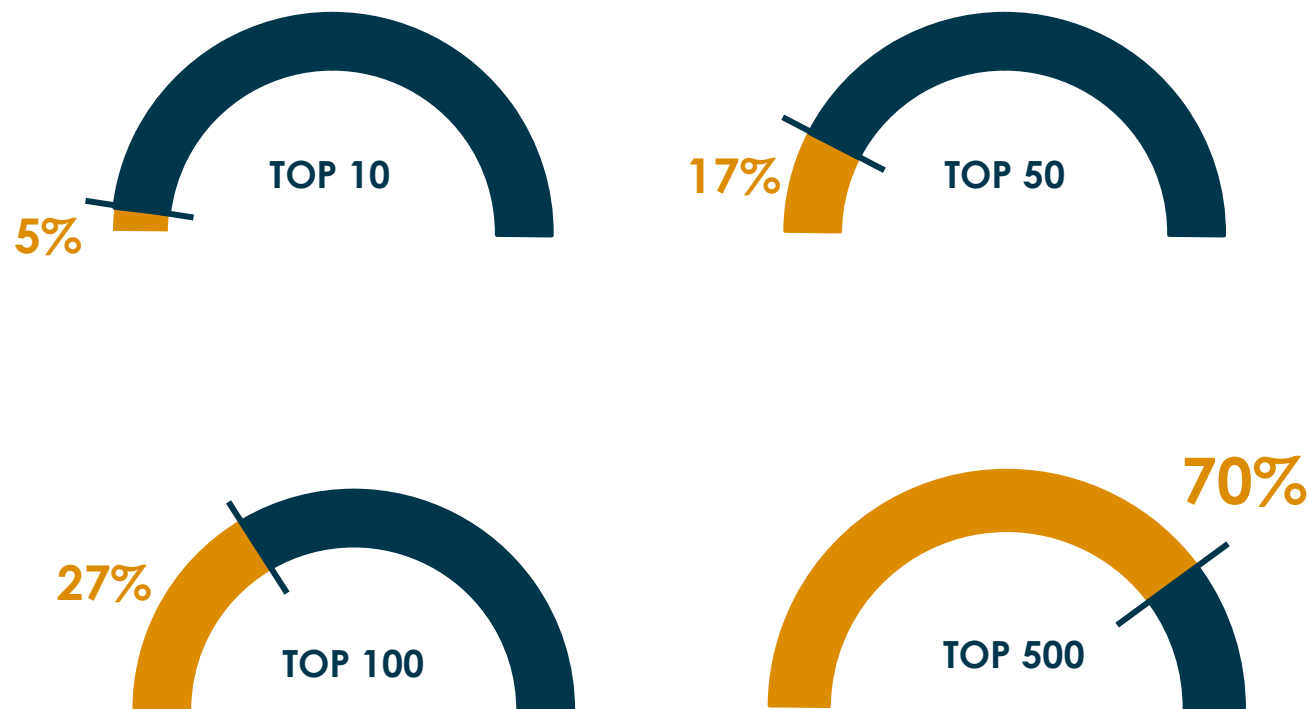
Listening source by song language type
*Share in **streams***
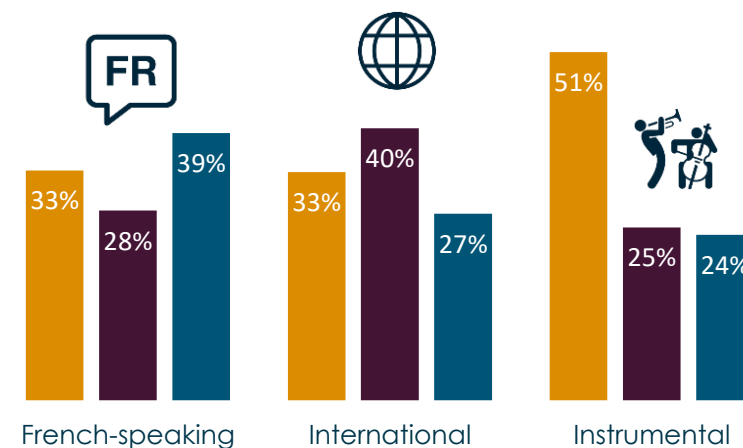
Weight of different top charts within the aggregate top 1,000 tracks

The top 500 accounts for 70% of total streams

The top 100 account for 27% of total streams and **the top 500 tracks in the aggregate top 1,000 account for 70% of total streams**.

5% TOP 10

17% TOP 50

27% TOP 100

70% TOP 500

AGGREGATE TOP	Share of total streams	
Top 10	5%	
Top 50	17%	+220%f of streams
Top 100	27%	
Top 200	41%	+54% of streams
Top 300	52%	
Top 400	62%	+18% of streams
Top 500	70%	

The most significant progression is observed between the **top 10** and the **top 50**, where the number of streams **multiplies by 3**.

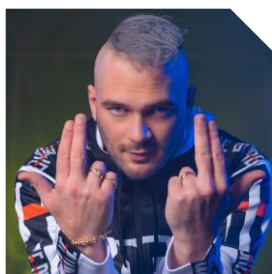*The top 10 most-streamed artists from the platform sample group (aggregate 1,000 tracks)*

9 of the 10 most-streamed artists are referenced under the genre Rap
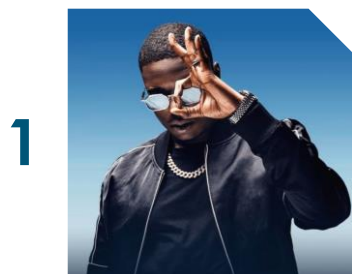
1

Ninho
(Rap)
33 tracks
632 m streams

34 collaborations / 1,4 bn streams

2

Jul
(Rap)
27 tracks
422 m streams

18 collaborations / 837 m streams

3

Damso
(Rap)
23 tracks
396 m streams

13 collaborations / 583 m streams
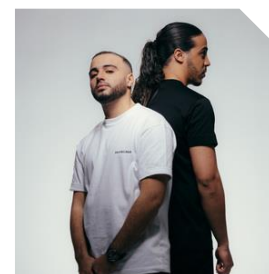
4

Djadja & Dinaz
(Rap)
21 tracks
344 m streams

Zero collaboration
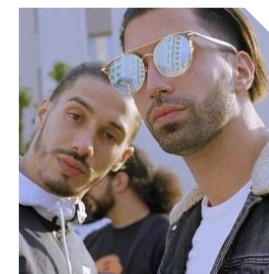
5

PNL
(Rap)
23 tracks
335 m streams

Zero collaboration

6

SCH
(Rap)
17 tracks
276 m streams

14 collaborations / 652 m streams

7

Booba
(Rap)
17 tracks
242 m streams

16 collaborations / 551 m streams

8

OBOY
(Rap)
7 tracks
229 m streams

5 collaborations / 274 m streams

9

Naps
(Rap)
5 tracks
222 m streams

8 collaborations / 459 m streams

10

Aya Nakamura
(Groove-R&B)
9 tracks
162 m streams

5 collaborations / 234 m streams

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