

BAROMETER OF MUSIC ENGAGEMENT IN FRANCE

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Centre national
de la musique

GAME CHANGERS



sopra  steria



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METHODOLOGY



SAMPLE

Survey conducted amongst **4,035 people** aged 15 and over and living in mainland France, constituting a representative sample of this population.



SURVEY PERIOD

From 3 to 11 May 2023



METHODOLOGY

Sample interviewed online via CAWI (Computer assisted web interviews) on Ipsos Online Access Panel

Quota sampling method:

Gender crossed by age, occupation, region and size of urban area for each person interviewed

Note to the reader: All results are expressed as percentages (%). When a result presented on the basis of a subsample is significantly higher than the overall result (with a 99% confidence threshold*) it is displayed on a green background. If the result is significantly lower than the overall result (with a 99% confidence threshold*), it is displayed on a red background. *The chi-squared method is used to calculate statistically significant differences (with 99% thresholds).



This report was drafted in compliance with the ISO 20252 international standard for market, opinion and social research. The original French version of this report was reviewed by Alice Tétaz, Client Service Director, Ipsos Public Affairs.

PART 1

CONTEXT – THE IMPORTANCE OF MUSIC IN OUR LIVES



GAME CHANGERS

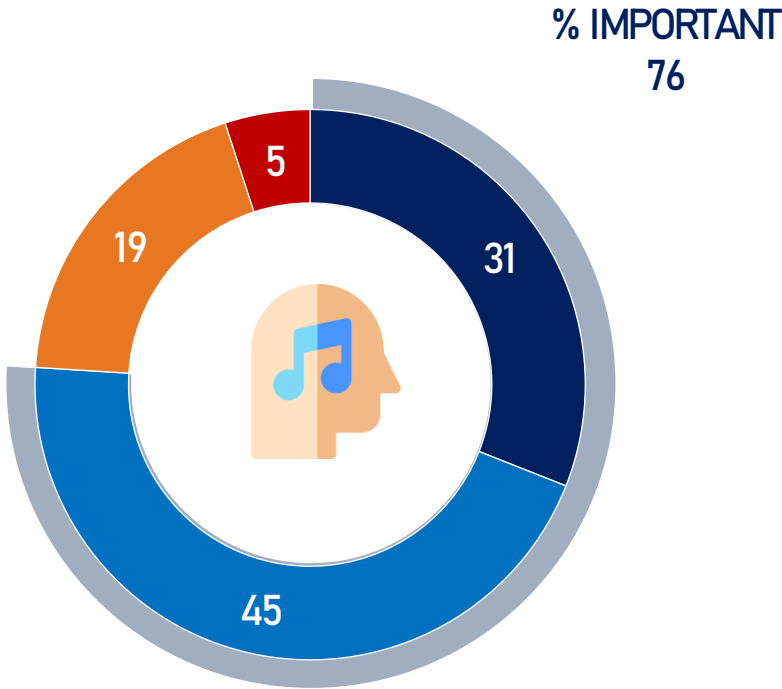


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More than three quarters of French people say that music occupies an important place in their lives, with music being particularly important for young people

Question: "How would you describe the place music occupies in your life?"
(Source: All respondents)



GENDER						% IMPORTANT
	Male	31	43	20	6	74
	Female	31	46	18	5	77
AGE						
	Under 25	52	37	8	3	89
	25-34	43	42	11	4	85
	35-44	34	47	14	5	81
	45-59	27	46	21	6	73
	60-69	20	46	27	7	66
	70+	12	50	31	7	62
SOCIO-ECONOMIC CATEGORY						
	Higher managerial	39	41	16	4	80
	Intermediate	30	49	16	5	79
	Skilled manual	37	46	13	4	83
	Unskilled manual	30	45	20	5	75
	Retired	15	48	30	7	63



Playing a musical instrument or practicing singing is much more common amongst French people under 45 than those over 45

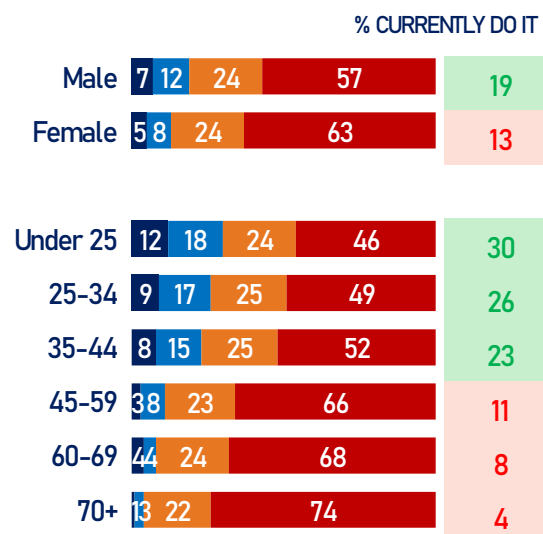
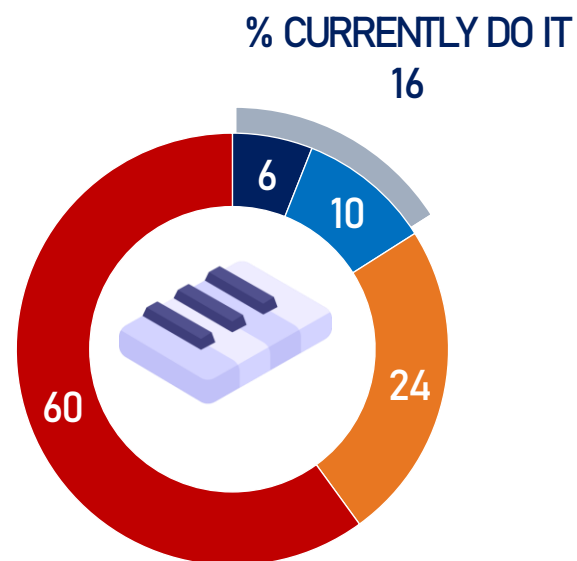


Question: "How often do you...?"

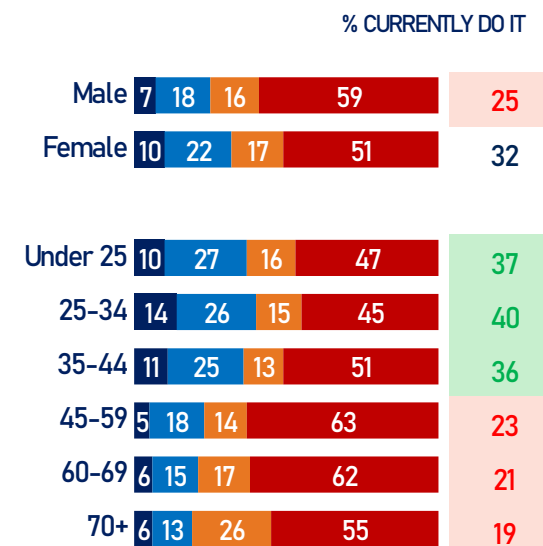
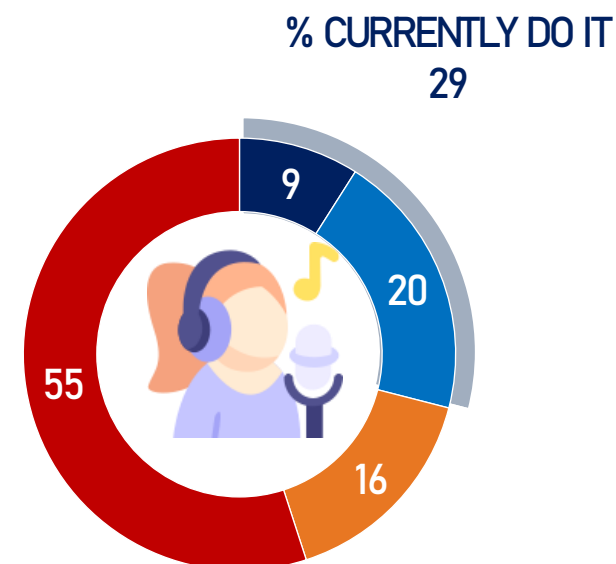
(Source: All respondents)

Play a musical instrument

(string, wind, percussion, electronic instruments, production software, etc)



Practice singing



I DO IT OFTEN

I DO IT OCCASIONALLY

I USED TO DO IT BUT DON'T ANY MORE

I'VE NEVER DONE IT

PART 2

MUSIC ENGAGEMENT AND LISTENING HABITS

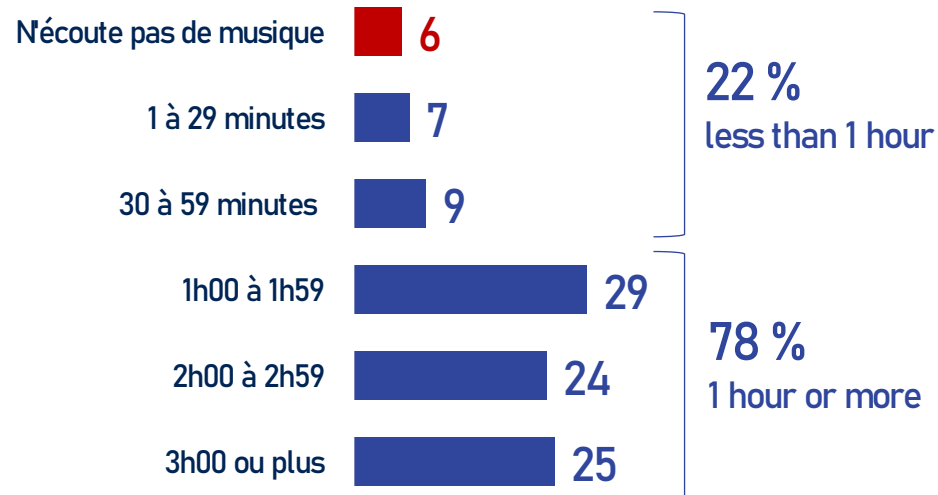


MUSIC ENGAGMENET AND LISTENING HABITS

The background of the slide features a series of diagonal stripes. The stripes alternate between a dark blue color and a teal color, running from the bottom-left towards the top-right. The stripes vary in width, creating a dynamic, geometric pattern.

French people spend on average 2 hrs and 11 mins listening to music a day, with young people listening 1 hr and 5 mins longer than older people

Question: "On average per day, how much time do you spend listening to music, all formats combined (radio, streaming platforms, CDs, etc.) – excluding concerts and festivals?"
(Source: All respondents)



GENDER	AVERAGE	% AT LEAST 1 MINUTE
Male	2hrs 14	94
Female	2hrs 07	93
AGE*		
Under 25	2hrs 43	98
25-34	2hrs 26	95
35-44	2hrs 30	96
45-59	2hrs 06	94
60-69	1hr 46	90
70+	1hr 38	88

SOCIO-ECONOMIC CATEGORY		
Higher managerial	2hrs 14	96
Intermediate	2hrs 09	97
Skilled manual	2hrs 26	96
Unskilled manual	2hrs 30	94
Retired	1hr 43	88

HOW IMPORTANT IS THE PLACE MUSIC HOLDS IN YOUR LIFE

Very important	3 hrs 22	100
Moderately important	2hrs 08	99
Slightly important	0 hr 54	86
Not important at all	0 hr 17	35

French people over 70 listen to much less music than their younger counterparts. Their average listening time is 1 hr 38 mins, which is 33 minutes less than the average French person, and 1 hr 5 mins less than young people under 25.

THE MOST LISTENED TO MUSIC GENRE*

Electronic music (electro, techno, house...)	3hrs 00
Metal / Hardrock	2hrs 44
Rap / Hip-Hop	2hrs 36

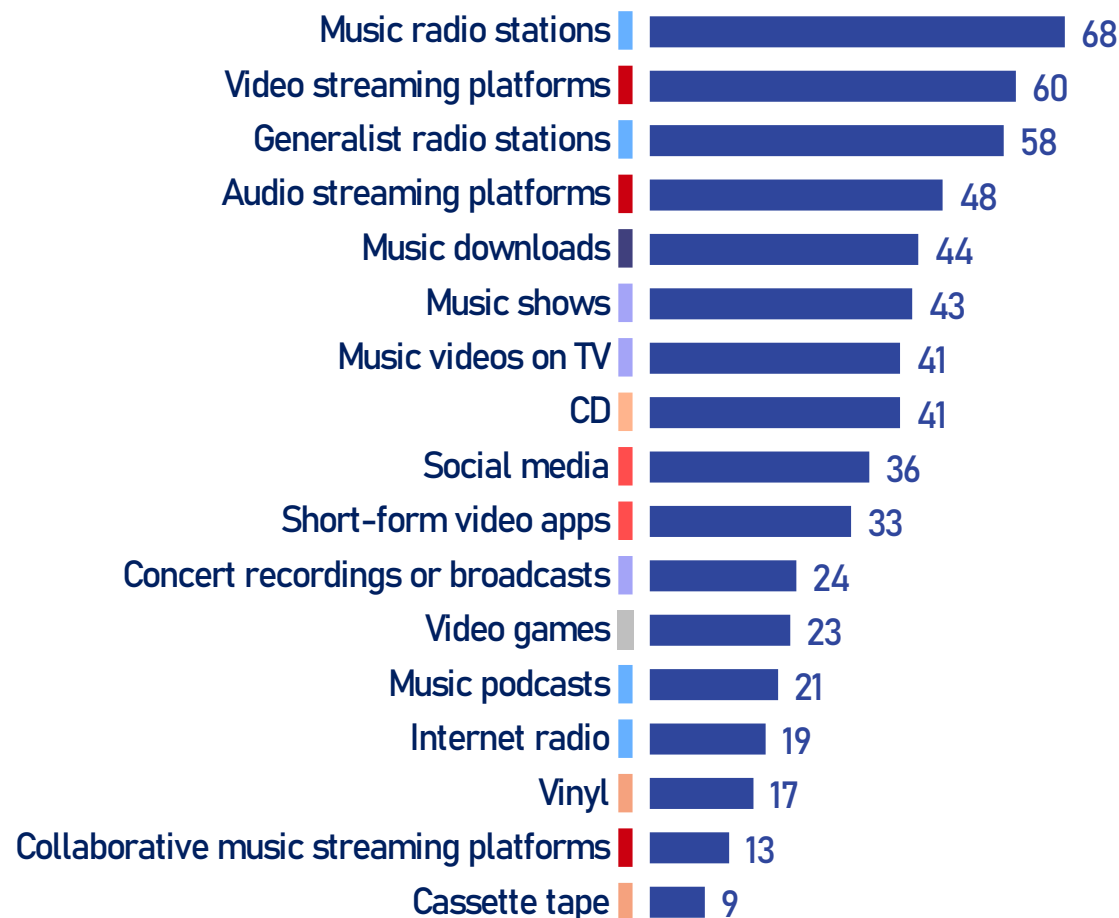
**Note to readers: French people who say that they listen to the rap / hip-hop genre the most, listen to music for an average of 2 hrs 36 mins per day (all music genres combined).

Radio is the most popular method for listening to recorded music, followed by streaming platforms

Question: "Over the past 12 months, have you listened to music via the following media?"

(Source: Those who listen to music, i.e. 94 % of the sample)

% AT LEAST ONCE A MONTH



RADIO, INTERNET RADIO & PODCASTS: 85 %



STREAMING PLATFORMS: 73 %



TV: 62 %



PHYSICAL FORMATS: 45 %



SOCIAL MEDIA, SHORT-FORM VIDEOS: 43 %



PERSONAL DIGITAL LIBRARY: 44 %



VIDEO GAMES: 23 %

The usage data mirrors music industry market figures.

Three quarters of French people who listen to music now do so on streaming platforms. Only a minority use physical formats; while music is consumed on social media and short-form videos in an equivalent proportion.

A quarter of respondents listen to music on video games.



Almost 1 in 2 French people who listen to music have been to a concert in the past 12 months, and 3 in 10 have been to a festival



Question: “Over the last 12 months, have you been to a.... “
(Source: Those who listen to music, i.e. 94 % of the sample)

% YES FREE AND/OR PAID LIVE EVENTS



% CONCERTS: 47 %



% FESTIVALS: 30 %

Generally speaking, whatever the type of live music event, those under 35 – and even more significantly, those under 25 – attend live music events much more than those above this age (attendance drops sharply after 45 years old). The same applies for those in higher managerial and professional occupations, compared to those in other socio-economic categories.

The most popular recorded music genre is by far chanson française, followed by pop/folk and rock/punk, but the most listened to genres vary significantly by age



Question: "In general and for all listening formats combined (CD, vinyl, streaming, radio, etc), what are the 5 music genres that you listened to the most over the past 12 months (excluding concerts and festivals)?" (Source: Those who listened to recorded music at least once over the past 12 months, i.e. 94 % of the sample) – Total greater than 100 as five answers possible

FIRST CHOICE	TOTAL (INCLUDING FIRST CHOICE)	BY GENDER		BY AGE						
		Male	Female	Under 25	25-34	35-44	45-59	60-69	70+	
Variety pop / Chanson française	27 67	62	72	47	54	61	73	82	82	
Pop / Folk	13 50	51	48	53	43	55	56	54	34	
Rock / Punk	11 43	49	37	37	41	49	49	45	31	
R&B / Soul	5 31	28	33	36	43	39	27	22	18	
Funk / Disco	5 30	32	29	24	21	27	46	33	20	
Rap / Hip-Hop	9 28	28	27	59	52	36	17	6	3	
Traditional folk and global music	3 24	22	26	17	19	21	24	24	41	
Classical music (inc. contemporary classical and opera)	5 22	21	22	14	13	15	16	30	46	
Jazz-Blues	4 21	22	20	11	10	14	17	30	46	
Latin music	3 21	18	24	20	25	20	18	20	22	
Electronic music (electro, techno, house...)	4 20	25	16	29	32	24	22	9	5	
Metal / Hardrock	4 16	23	10	16	16	20	21	13	7	
Reggae / Dub	2 16	16	16	14	19	17	15	17	12	
Musicals	1 14	10	18	11	11	13	12	15	23	
Dancehall / Zouk	1 8	7	9	7	14	11	7	5	3	
K-Pop	1 6	6	7	19	7	5	4	2	1	
Other	2 4	4	4	6	4	4	3	3	3	

Variety pop/chanson française is much more popular amongst older generations compared to younger generations. However, apart from 15-24 year olds, it is the most listened to genre for all the age groups observed.

The rap/hip-hop genre is much more popular amongst younger people, as it's the most popular genre for 15-24 year olds, and the second most listened to genre for 25-34 year olds.

K-pop is unlike other music genres in that it is almost mainly listened to by 15-24 year olds.



The most popular live music genres are relatively similar to the most popular recorded music genres: chanson française comes in first, ahead of pop/folk and rock/punk

Question: "In general, what are the 5 music genres that you listened to the most live (concerts and festivals) over the past 12 months?"

(Source: Those who listened to live music at least once over the past 12 months, i.e. 58 % of the sample) - Total greater than 100 as five answers possible

FIRST CHOICE	TOTAL (INCLUDING FIRST CHOICE)	Recorded music result	BY GENDER		BY AGE					
			Male	Female	Under 25	25-34	35-44	45-59	60-69	70+
Variety pop / Chanson française	27	62	57	66	47	53	58	69	73	72
Pop / Folk	13	44	47	42	49	41	46	49	49	28
Rock / Punk	11	40	47	34	34	39	46	47	44	29
Traditional folk and global music	4	26	23	28	19	23	25	23	28	43
Rap / Hip-Hop	8	25	26	24	50	41	27	16	6	5
R&B / Soul	4	24	22	25	31	32	24	21	19	12
Funk / Disco	4	24	25	22	19	19	19	35	26	19
Jazz-Blues	4	22	23	21	15	12	17	21	36	41
Electronic music (electro, techno, house...)	4	19	21	16	24	28	22	17	11	6
Latin music	2	19	17	20	17	23	16	18	15	23
Classical music (inc. contemporary classical and opera)	6	18	18	18	14	13	17	14	26	32
Metal / Hardrock	4	14	19	9	13	14	18	17	12	5
K-Pop	2	14	15	14	12	17	18	17	14	8
Musical	2	13	12	15	12	11	12	11	13	22
Reggae / Dub	1	8	8	8	13	12	9	6	3	4
Dancehall / Zouk	2	5	5	5	12	7	5	3	2	1
Other	2	2	2	3	1	2	2	2	3	5

K-pop has a significant live audience, compared to its recorded music audience. Conversely, variety pop/chanson française, pop/folk, R&B/soul, funk/disco and reggae/dub are amongst the genres least listened to live compared to their recorded music equivalent.

Note to readers: the numbers circled correspond to the percentages showing the greatest differences for the same item between the genres for live and recorded music.

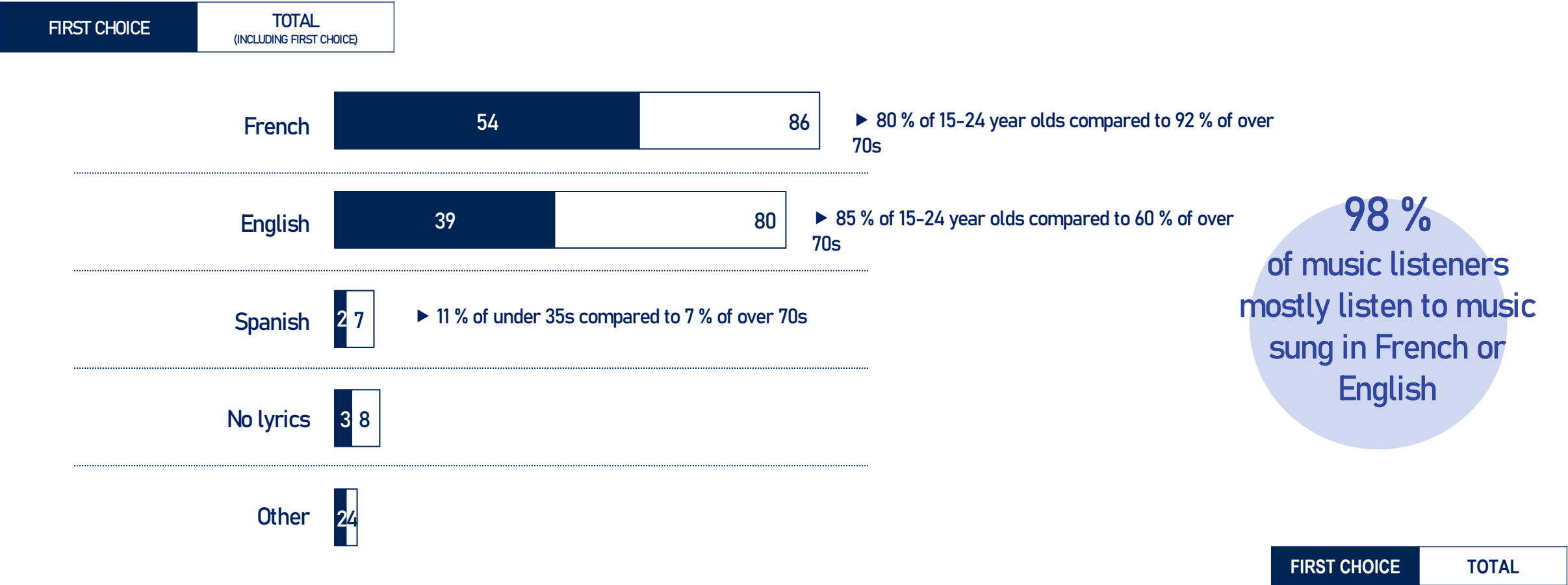
MUSIC ENGAGEMENT AND LISTENING PREFERENCES

The background of the slide features a series of parallel diagonal stripes. The stripes alternate between a vibrant teal color and a deep navy blue. The stripes run from the bottom-left towards the top-right, creating a sense of movement and modernity. The text is positioned in the upper-left quadrant, set against the solid navy blue background.

French music listeners mainly listen to songs sung in French and English



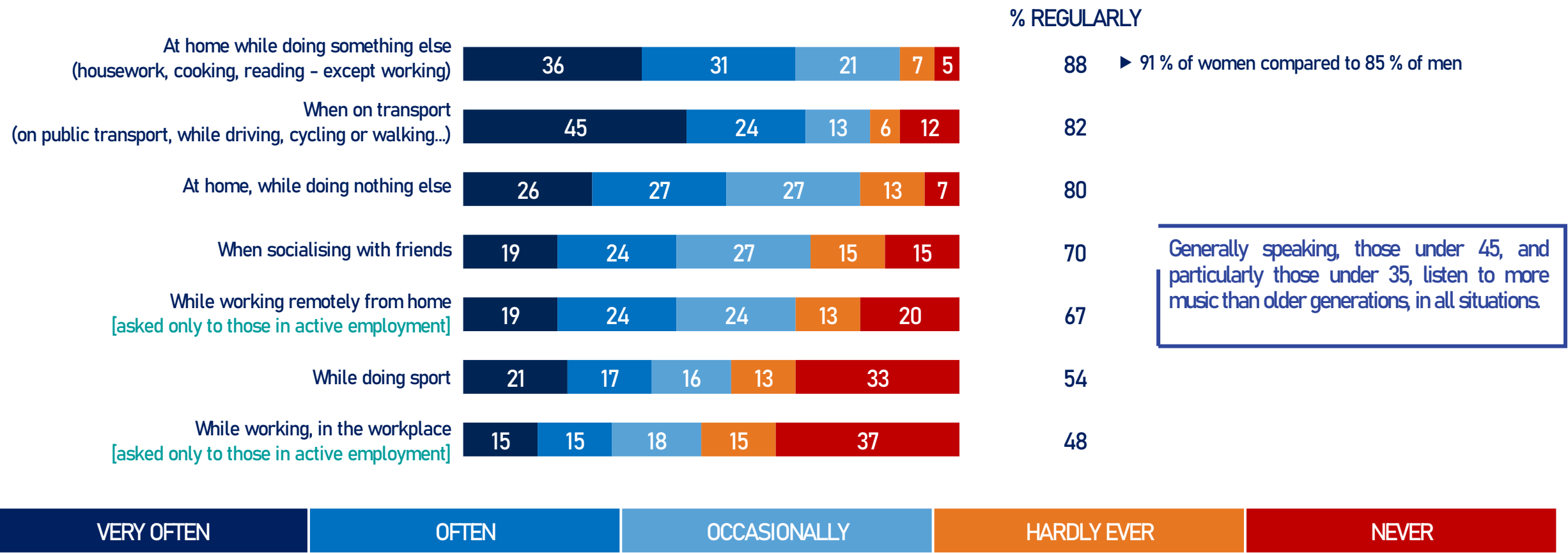
Question: “Generally speaking, the music you listen to is mostly sung in...”
(Source: Those who listened to either recorded music or live music at least once over the past 12 months, i.e. 94% of the sample) – Total greater than 100 as five answers possible



The majority of French people listen to music at home, but a large majority also listen to music when on transport, while almost one in two workers listen to music while at work



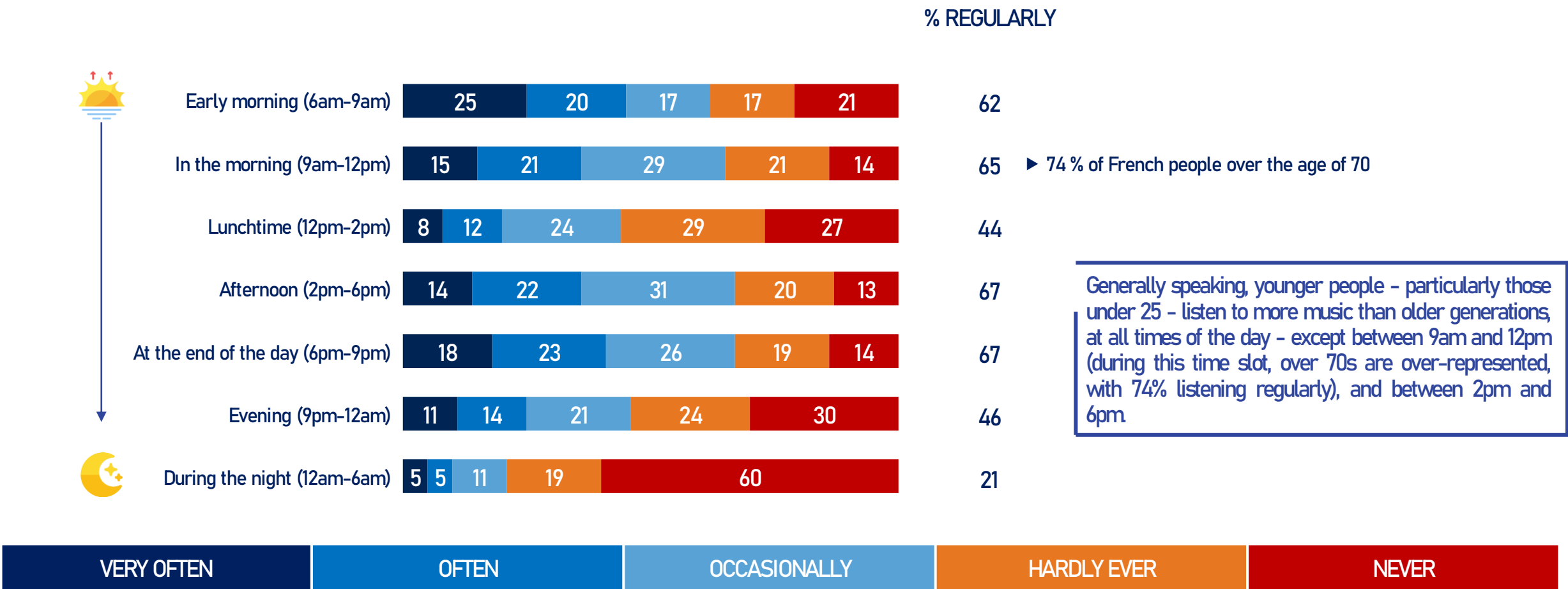
Question: “For each of the following situations and for all formats combined (CD, vinyl, streaming, radio – excluding concerts and festivals), do you listen to music...?”
(Source: Those who listened to recorded music at least once a month over the past 12 months, i.e. 94% of the sample)



French people prefer listening to music during the morning, afternoon and evening



Question: “How often do you listen to music during the following time slots?”
(Source: Those who listened to recorded music at least once a month over the past 12 months i.e. 94% of the sample)

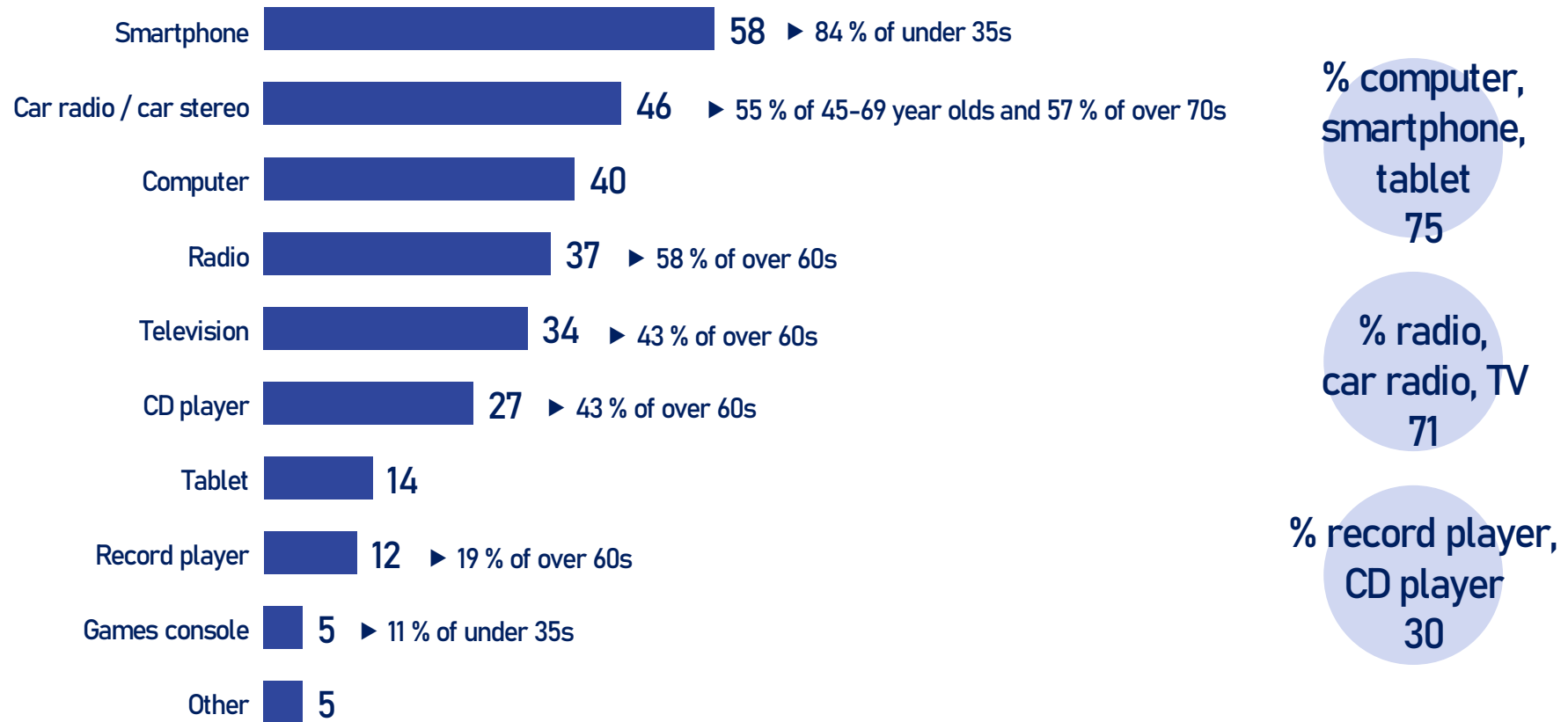


Listeners prefer listening to music on their smartphone, with their car stereo coming in second place



Question: "Which device(s) do you most often use to play music?"

(Source: Those who listened to recorded music at least once a month over the past 12 months, i.e. 94% of the sample)

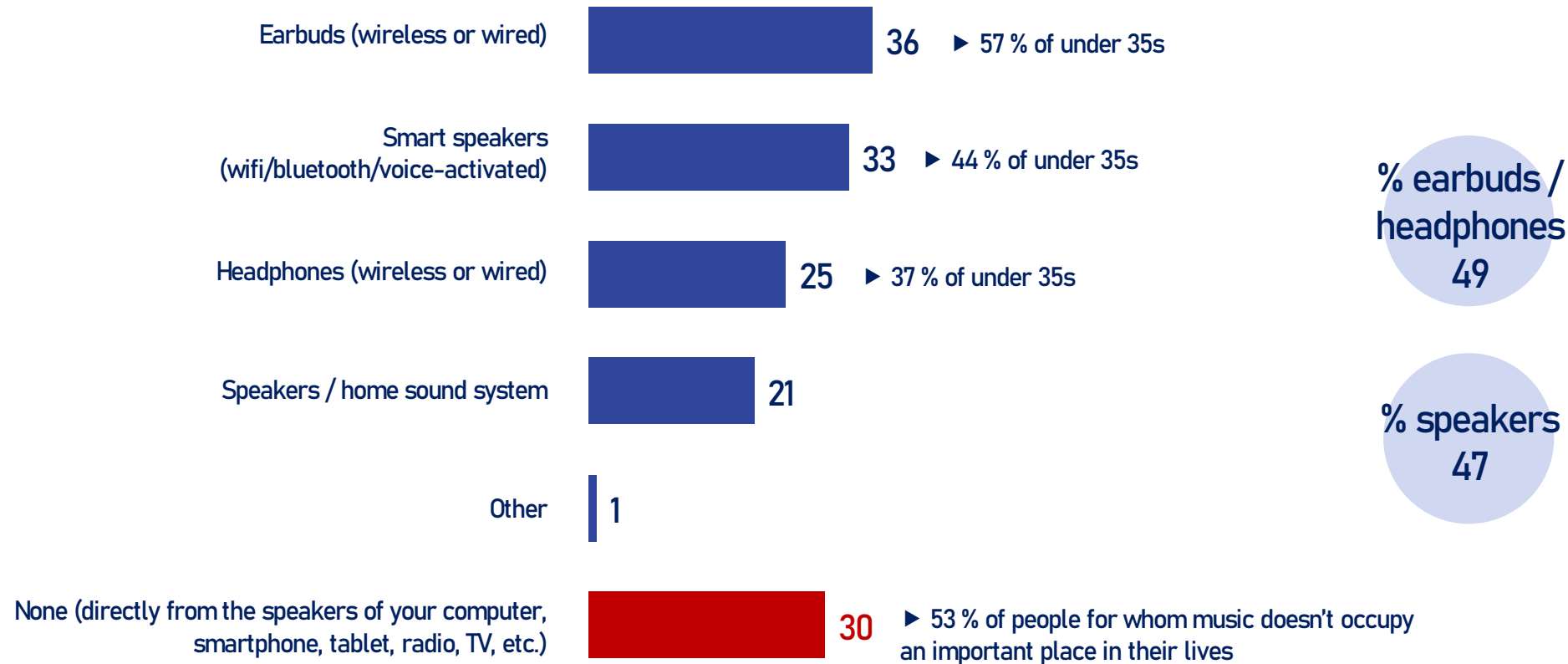




Earbuds and connected speakers are the most popular devices for listening to music, but headphones and home sound systems are also commonly used, as is listening without any equipment (directly from the format source)

Question: "What devices do you most often use to listen to music?"

(Source: Those who listened to recorded music at least once a month over the past 12 months, i.e. 94% of the sample) – Total greater than 100 as several answers possible

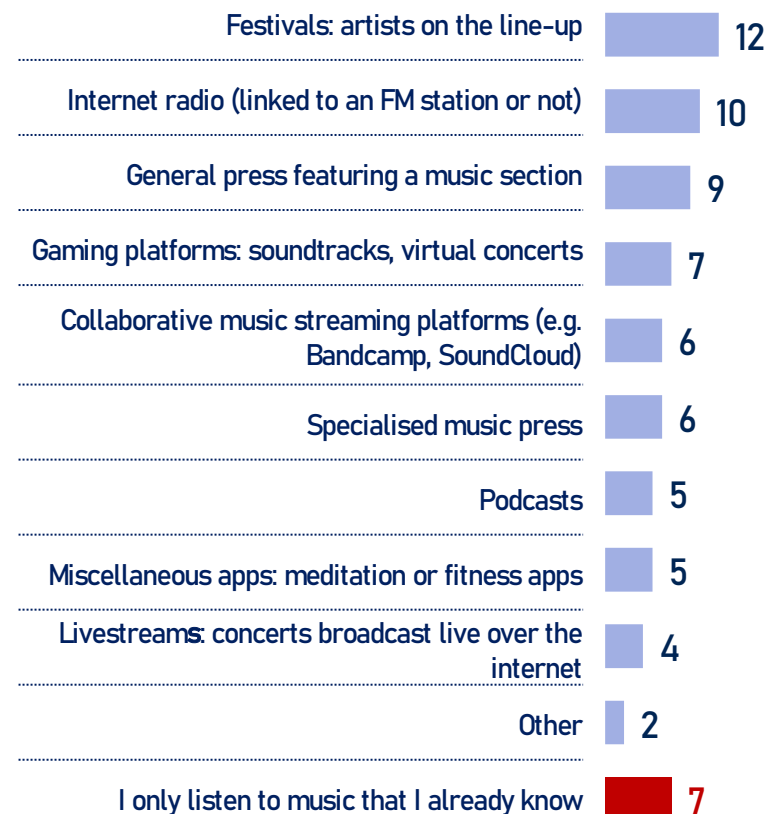
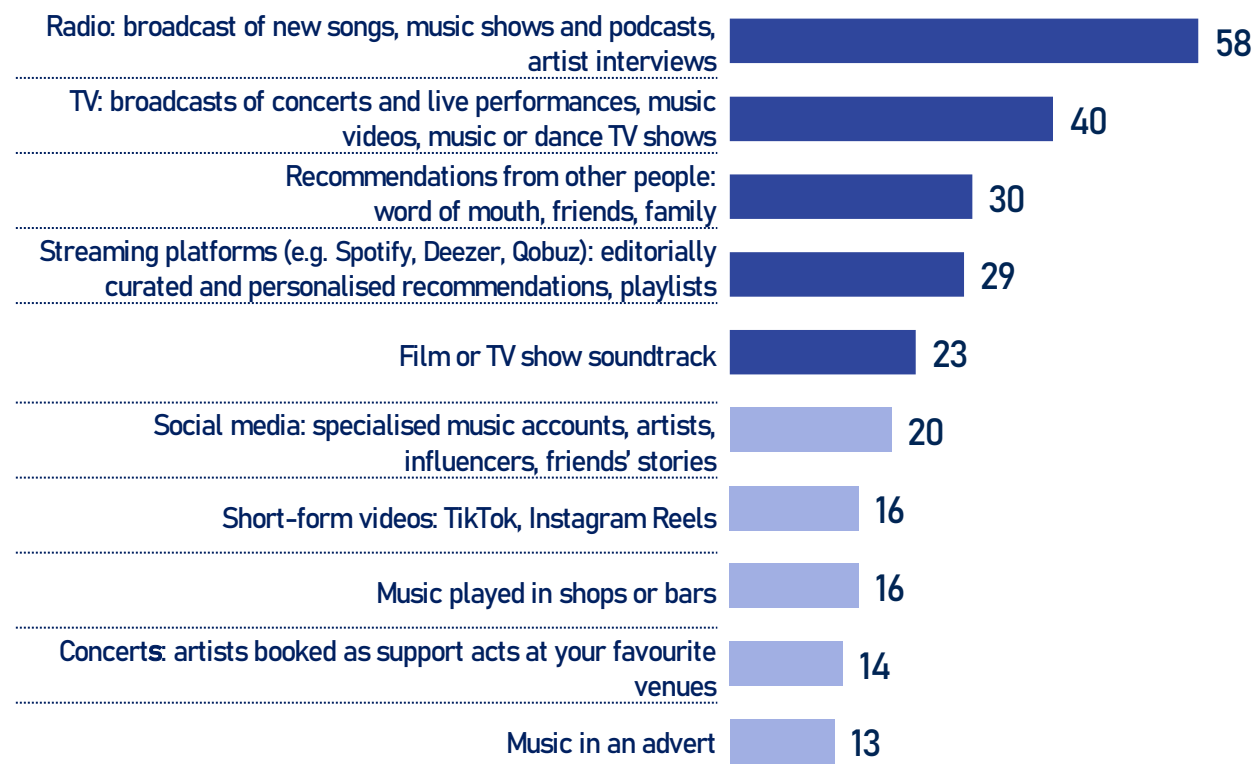


The 5 main sources of music discovery are radio, television and, to a lesser extent, word of mouth, streaming platforms and soundtracks



Question: "What are the main sources through which you most discover new music?"

(Source: Those who listened to recorded music at least once a month over the past 12 months or who listened to a live concert in the past 12 months, i.e. 94% of the sample) – Total greater than 100 as several answers possible



Younger people mainly discover new music via streaming platforms and social media; music discovery via gaming platforms is nevertheless not insignificant



Question: "What are the main sources through which you most discover new music?"

(Source: Those who listened to recorded music at least once a month over the past 12 months or who listened to a live concert over the past 12 months, i.e. 94% of the sample) –

Total greater than 100 as several answers possible

% in total	OUT OF THE TOTAL SAMPLE	BY AGE					
		Under 25	25-34	35-44	45-59	60-69	70+
Radio: broadcast of new songs, music shows and podcasts, artist interviews	58	33	49	61	68	68	65
TV: broadcasts of concerts and live performances, music videos, music or dance TV shows	40	27	30	36	45	47	53
Recommendations from other people: word of mouth, friends, family	30	33	30	23	31	34	30
Streaming platforms (e.g. Spotify, Deezer, Qobuz): editorially curated and personalised recommendations, playlists	29	49	41	35	25	16	10
Film or TV show soundtrack	23	22	23	25	25	22	21
Social media: specialised music accounts, artists, influencers, friends' stories	20	38	32	20	15	10	6
Short-form videos: TikTok, Instagram Reels	16	41	23	15	9	8	4
Music played in shops or bars	16	16	20	17	16	13	12
Concerts: artists booked as support acts at your favourite venues	14	18	12	14	14	15	12
Music in an advert	13	13	13	14	14	11	11

















% in total	OUT OF THE TOTAL SAMPLE	BY AGE					
		Under 25	25-34	35-44	45-59	60-69	70+
Festivals: artists on the line-up	12	13	15	11	12	9	9
Internet radio (linked to an FM station or not)	10	10	9	12	13	8	6
General press featuring a music section	9	6	6	8	7	12	13
Gaming platforms: soundtracks, virtual concerts	7	19	13	8	3	1	1
Collaborative music streaming platforms (e.g. Bandcamp, SoundCloud)	6	11	11	8	5	3	1
Specialised music press	6	6	5	7	5	5	5
Podcasts	5	7	9	6	3	3	1
Miscellaneous apps: meditation or fitness apps	5	8	8	4	4	4	3
Livestreams: concerts broadcast live over the internet	4	8	7	3	4	2	1
Other	2	2	2	2	2	2	1
I only listen to music that I already know	7	3	3	4	7	10	13

Links between different music listening habits

Question: "During the past 12 months, have you listened to music via the following methods?"

(Source: Those who listen to music, i.e. 94% of the sample)

% AT LEAST ONCE A MONTH (RECORDED) / % AT LEAST ONCE A MONTH OVER THE PAST 12 MONTHS (LIVE)

People who listen via → also listen via ↓	 Physical formats	 Personal digital library	 Streaming platforms	 Social media, video games	 Radio & podcasts	 Television	 Concerts	 Festivals
 Physical formats	100	56	45	47	48	53	58	63
 Personal digital library	54	100	53	57	45	51	57	63
 Streaming platforms	73	89	100	90	73	78	84	88
 Social media, video games	50	63	59	100	49	56	62	69
 Radio & podcasts	91	89	86	88	100	91	90	93
 Television	73	73	66	73	66	100	74	80
 Concerts	60	61	54	60	49	55	100	84
 Festivals	43	44	37	44	33	39	55	100



PART 3

FOCUS: LIVE MUSIC EVENTS



GAME CHANGERS

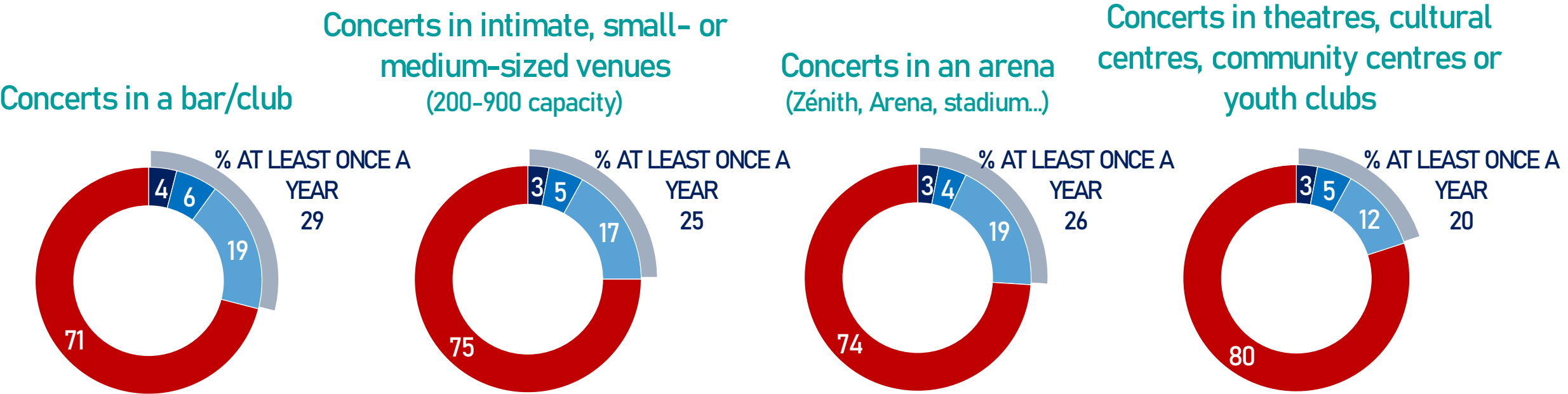


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Almost one in two French people who listen to music say they have been to a concert in the past 12 months



Question: “Over the past 12 months, have you been to.....”
(Source: Those who listen to music, i.e. 94% of the sample)



47 % have been to at least one concert over the past 12 months



Concert-goers tend to be slightly bigger music fans, younger and more educated than the average French person



Of those who have been to at least one concert over the past 12 months
(i.e. 47 % of those who listen to music)...

Over-represented profiles in terms of music engagement



Music occupies a very important place for **45 %** of them
(vs 31 % of all French people)



On average, they listen to **2 hrs 42 mins** of music every day
(vs 2 hrs 11 mins for all French people)



On average, they listen to music on **8 different formats** every month
(vs 6 for all those who listen to music)



49 % currently play an instrument or practice singing
(vs 34 % of all French people)



55 % have been to at least one festival over the past 12 months
(vs 30 % of all those who listen to music)

Over-represented socio-demographic profiles



39 % are under 35 (vs 29 % of all French people)



60 % have completed higher education (vs 52 %)

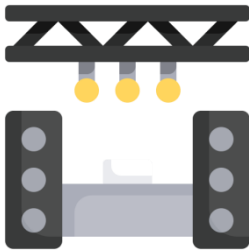


66 % are in employment (vs 57 %)



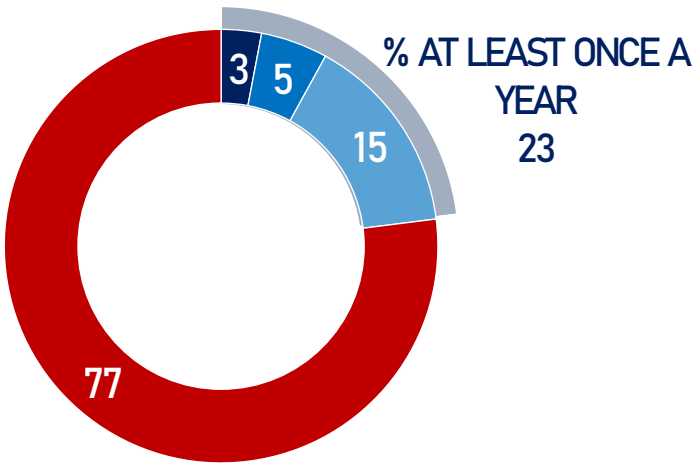
37 % are social grade AB+ (vs 29 %)

3 in 10 French people who listen to music say they went to at least one festival in the past 12 months

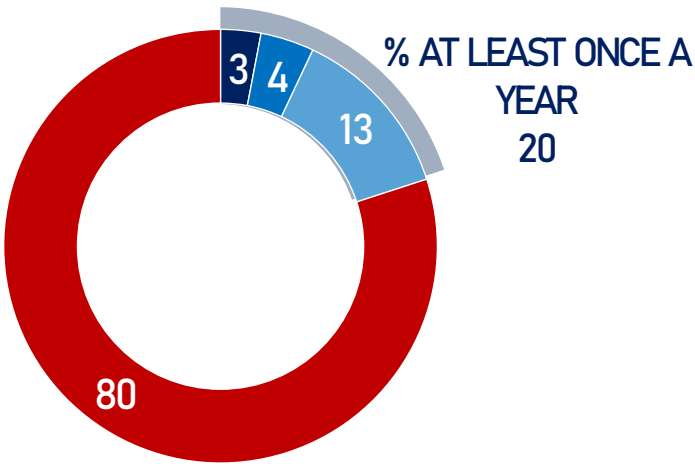


Question: "In the past 12 months, have you been to..."
(Source: Those who listen to music, i.e. 94% of the sample)

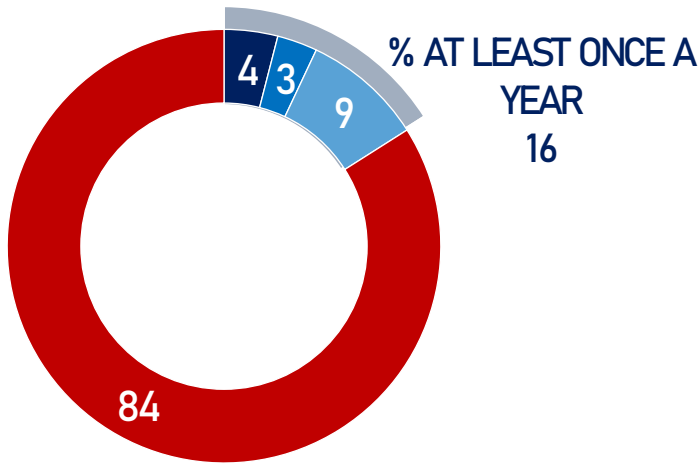
Boutique festivals
(an event centred on strong social or environmental values. Often small in size with local artists playing, located in a rural area)



Small- and medium-sized festivals
(held in major cities, e.g. La Route du Rock in Saint-Malo, Jazz Sous Les Pommiers in Coutances, Pause Guitare in Albi, Peacock Society in Choisy-le-Roi...)



Major festivals
(e.g. We Love Green, Hellfest, Vieilles Charrues, La Folle Journée in Nantes)



30 % have been to at least one festival in the past 12 months



Festival-goers tend to be much bigger music fans than the average French person, but also younger, more educated and more in the workforce



Of those who have been to at least one festival over the past 12 months
(i.e. 30 % of those who listen to music)

Over-represented profiles in terms of music engagement



Music occupies a very important place for **49 %** of them
(vs 31 % of all French people)



On average, they listen to **2 hrs 57 mins** of music every day
(vs 2h 11 mins for all French people)



On average, they listen to music on **9 different formats** every month
(vs 6 for all those who listen to music)



84 % have been to at least one concert over the past 12 months
(vs 47 % for all those who listen to music)



57 % currently play an instrument or practice singing
(vs 34 % of all French people)

Over-represented socio-demographic profiles



43 % are under 35 (vs 29 % of all French people)



60 % have completed higher education (vs 52 %)



67 % are in employment (vs 57 %)



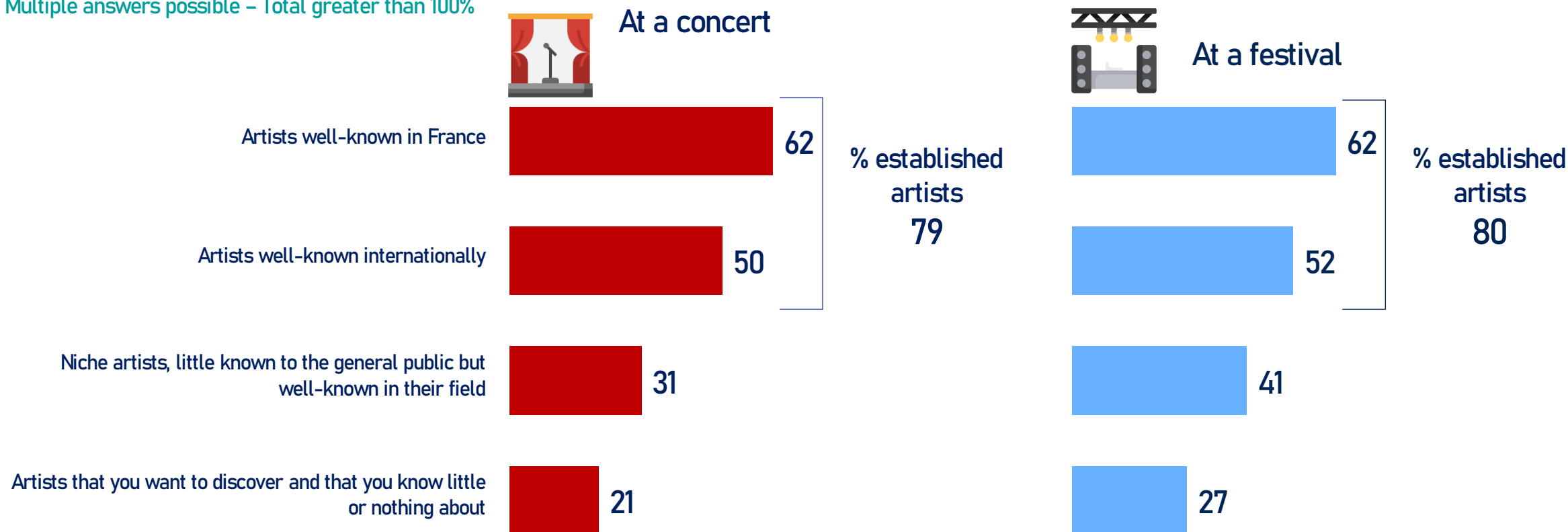
37 % are social grade AB+ (vs 29 %)

Live music fans mainly go to see established artists, whether in concert or at a festival, whereas festival-goers see more lesser-known artists, in addition to established artists



Questions: "What type(s) of artists do you go to see in concert (excluding festivals)?" (Source: Those who went to at least one concert, including free ones, over the past 12 months, i.e. 57% of the sample*) / "What type(s) of artists do you go to see at a festival?" (Source: Those who went to at least one festival over the past 12 months, i.e. 28% of the sample)

Multiple answers possible – Total greater than 100%

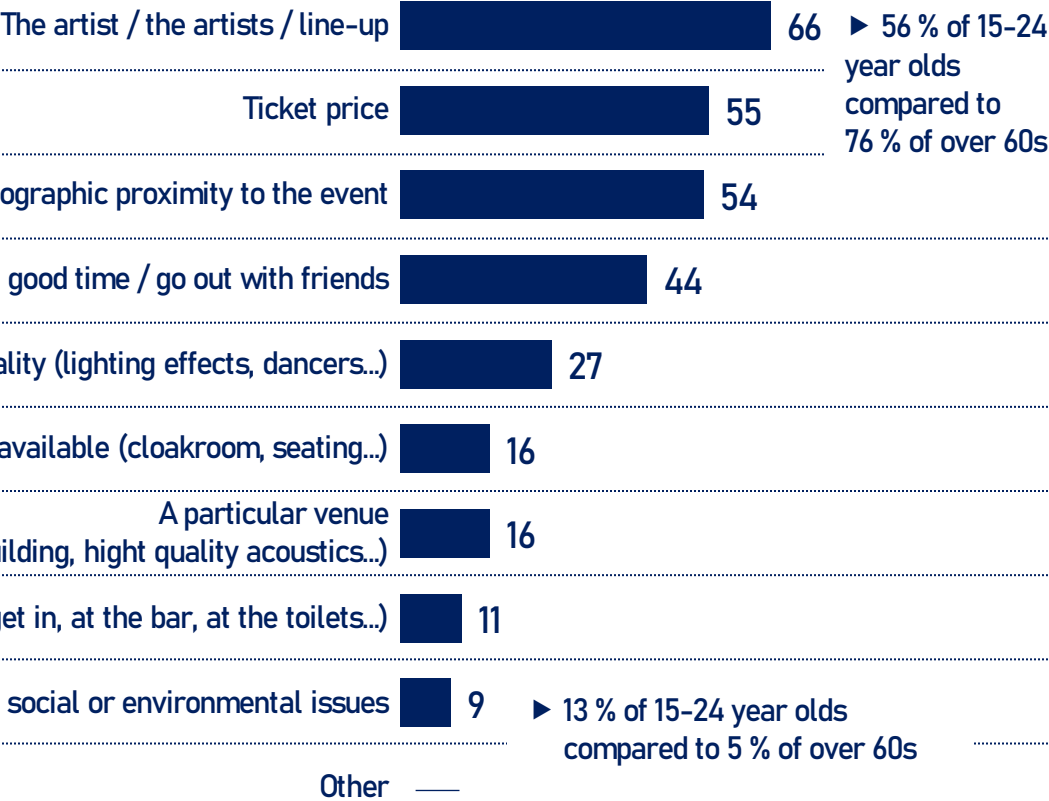


• the percentage is different from that indicated in previous slides as it also takes into account free concerts (e.g. Fête de la Musique, free concerts and festivals, street music)



The main criteria for going to a concert are the artists/line-up and, to a lesser extent, the price and geographic proximity.

Question: "From the following list, which do you consider to be the four most important criteria when going to a concert (excluding festivals)?
(Source: Those who attended at least one concert, including free ones, over the past 12 months, i.e. 57% of the sample) – Total greater than 100 as four answers possible



ACCORDING TO CONCERT-GOING FREQUENCY		
Very regular	Fairly regular	Moderate
46	76	77
42	55	61
35	59	63
36	50	47
29	30	28
23	14	15
22	18	13
21	9	7
24	6	4

The artist playing, price and geographic proximity remain the most important criteria for choosing a concert, whatever the profile. However, most frequent concert-goers (and by extension, younger audiences) attach less importance than the average to these criteria, and take into more account the consideration of environmental issues, queues and the level of comfort. These elements, relating in particular to the spectator experience, therefore play a truly differentiating role amongst the most regular concert-goers.



The main criteria for going to a festival are the line-up, the price, the atmosphere and the geographical proximity... but the most regular festival-goers take these elements into account less than the average festival-goer, and have much more diverse criteria

Question: "From the following list, which do you consider to be the four most important criteria when going to a festival (excluding a concert in a venue)?"

(Source: Those who attended at least one festival over the past 12 months, i.e. 28% of the sample) – Total greater than 100 as four answers possible



		ACCORDING TO FESTIVAL-GOING FREQUENCY		
		Very regular	Fairly regular	Moderate
The event's line-up, artists	47	26	56	56
Ticket price	47	30	50	57
To have a good time / go out with friends	42	27	47	49
Your geographic proximity to the event	41	24	44	53
The festival experience	28	26	31	25
Stage design quality (lighting effects, dancers...)	24	28	22	22
The level of comfort available (seating, safe zone, food services, camping...)	19	22	17	20
A particular venue (historical or landmarked venue, high-quality acoustics...)	18	21	18	15
Reasonable queue lengths (to get in, to go to the toilets or bar...)	14	22	9	12
Awareness of social or environmental issues	13	22	12	7
Activities apart from the shows (workshops, conferences, games...)	11	21	9	6
Other	—			

In the same logic as for concerts, but even more markedly, the most regular festival-goers are those who give the least importance to the line-up, price and geographic proximity when choosing a festival.

These criteria of course play a role in their choice, but almost in the same way as other issues (considered secondary by less regular festival-goers), such as taking into account environmental issues, queues or even possible extra activities. These elements therefore play a truly differentiating role amongst the most regular festival-going public.

The majority of avid concert-goers say they are willing to pay more than €50 for a concert, while 15% would be willing to pay more than €100



Questions: "On average, how much are you willing to spend on a ticket for a concert if..." / "On average, how much are you willing to spend on a ticket for a festival if..."
(Source: Those who went to live musical events over the past 12 months, i.e. 58% of the sample)



A concert



58% are willing to pay more than €50 for at least one type of concert

15% are willing to pay more than €100 for at least one type of concert

2% are willing to pay more than €200 for at least one type of concert



A festival



42% are willing to pay more than €50 for at least one type of festival

12% are willing to pay more than €100 for at least one type of festival

3% are willing to pay more than €200 for at least one type of festival

I'M NOT WILLING TO PAY FOR THAT

LESS THAN €10

BETWEEN €10 - €20

BETWEEN €21 - €50

BETWEEN €51 - €100

BETWEEN €101 - €200

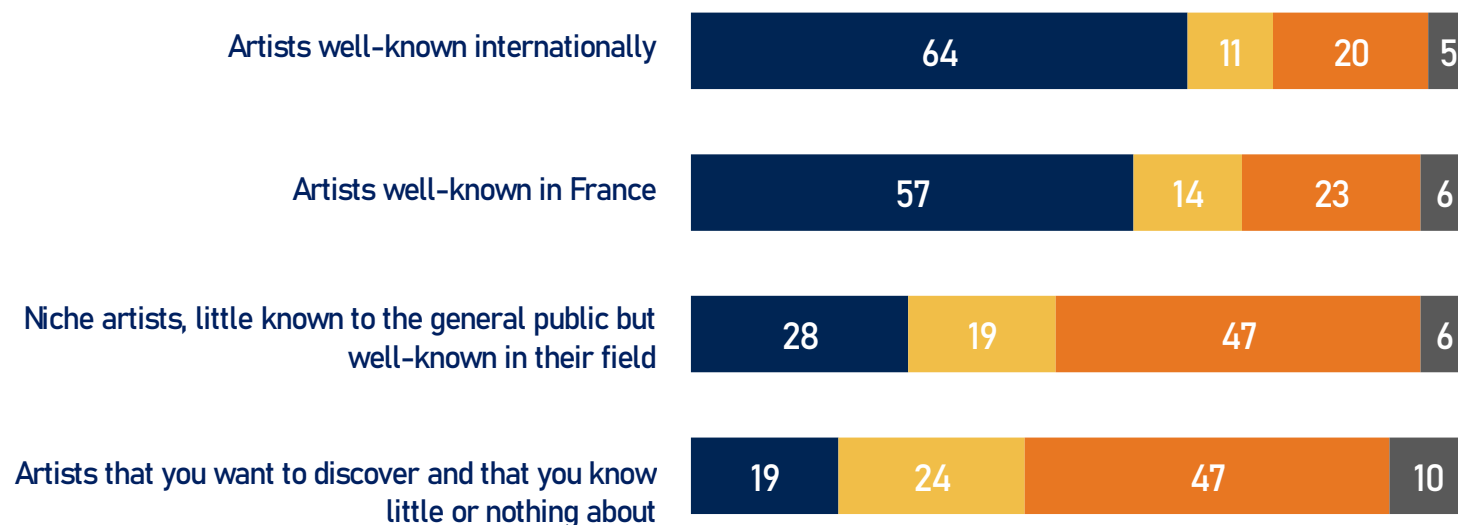
MORE THAN €200

Booking tickets in advance varies greatly depending on the artist's level of notoriety, as well as how often respondents go to concerts and festivals



Question: "Generally speaking, do you buy your concert/festival tickets to go see...". Respondents were offered items corresponding to the type(s) of artist(s) they had previously indicated they would see live.

(Source: Those who went to live music events over the past 12 months and who go see these types of artists)



When going to see niche artists, the most regular live music event attendees book their tickets in advance more than the average attendee. However, when it comes to events for well established artists, they more often decide whether to go at the very last minute.

WAY IN ADVANCE OF THE EVENT, AS SOON AS TICKETS GO ON SALE OR SHORTLY THEREAFTER

NEITHER ONE NOR THE OTHER

JUST BEFORE THE EVENT, AT THE VERY LAST MINUTE

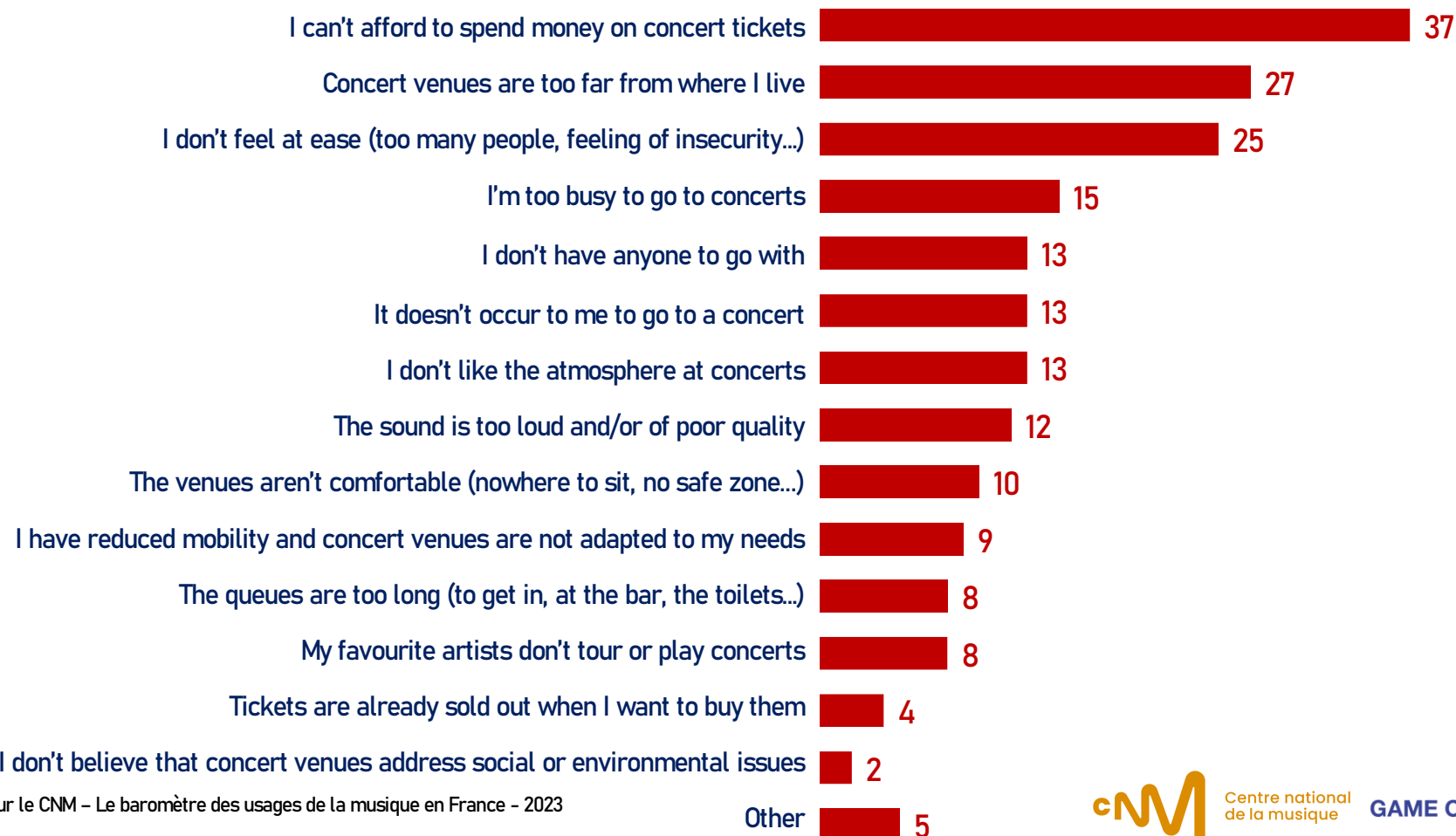
I DONT KNOW

Those who haven't been to any concerts over the past 12 months despite listening to music give insufficient financial resources as their main reason why, as well as their poor geographical proximity to venues and discomfort in crowded venues

Question: "What are the main reasons why you don't go to concerts very often or not at all?"

(Source: Those who listen to music but have not been to a concert over the past 12 months, i.e. 37% of the sample)

– Total greater than 100 as four answers possible



The main reasons for not going to festivals regularly are the same as for concerts, but with a less clear hierarchy: discomfort, lack of financial resources and geographical distance being almost equally distributed

Question: "What are the main reasons why you don't go to festivals very often or not at all?"
(Source: Those who listen to music but have not been to a festival over the past 12 months, i.e. 66% of the sample)
- Total greater than 100 as four answers possible



Figures for concerts

25
37
27
13
15
10
12
13
13
8
9
8
4
2
5

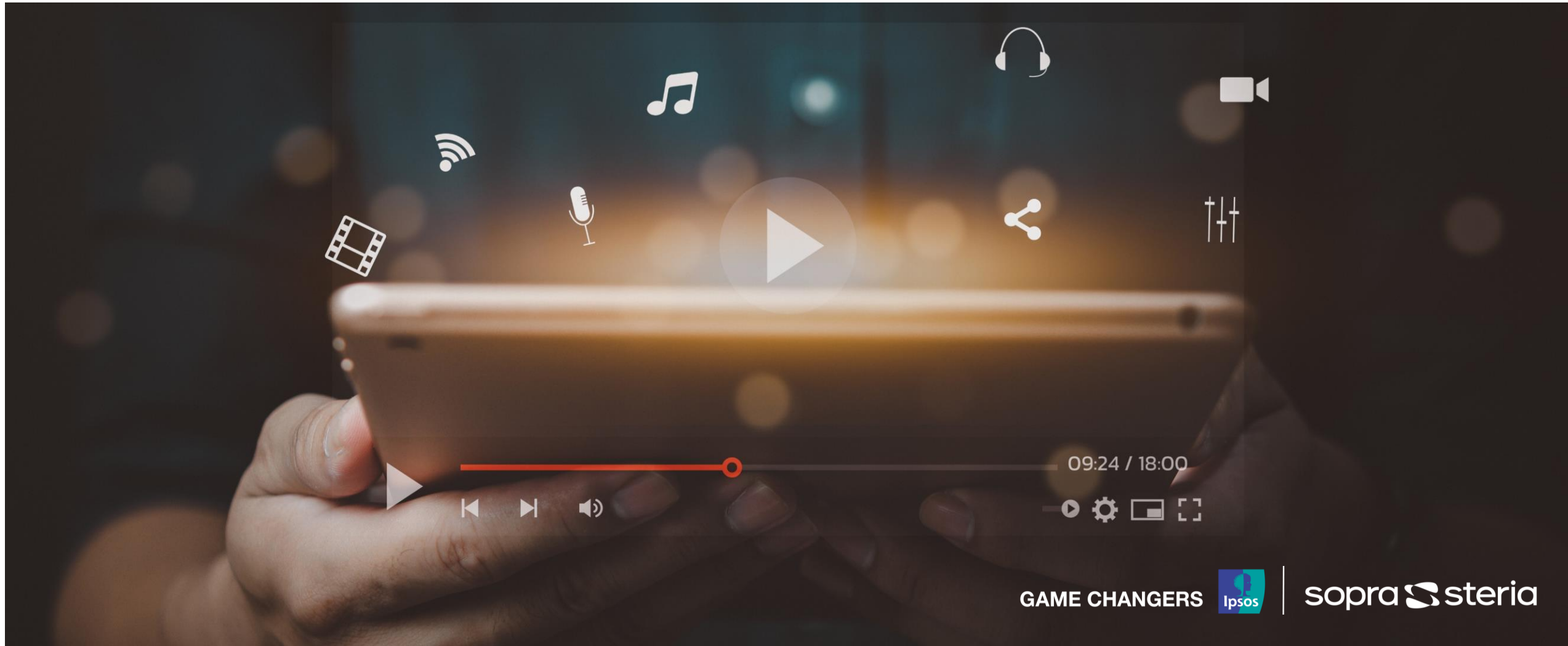
► Lack of financial resources falls to second place (-9 points).



Note to readers: the figures encircled correspond to the percentages presenting the greatest differences for the same item between festivals and concerts.

PART 4

FOCUS: STREAMING PLATFORMS

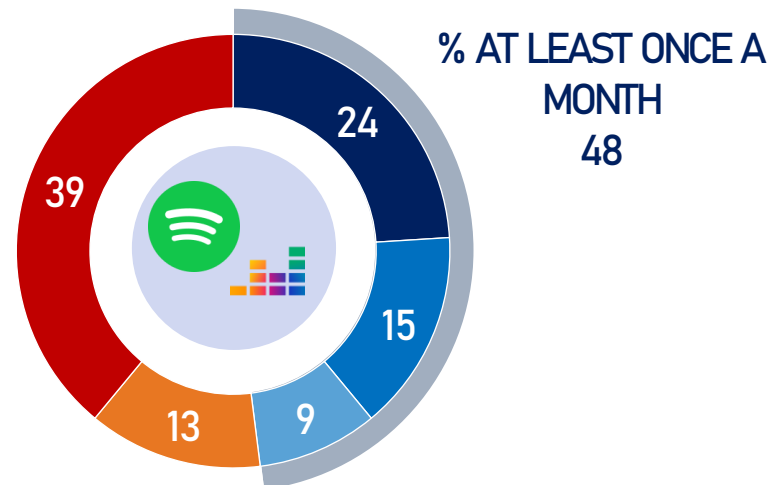


Nearly three quarters of French people listen to music via a streaming service at least once a month, with video streaming platforms being the most popular format

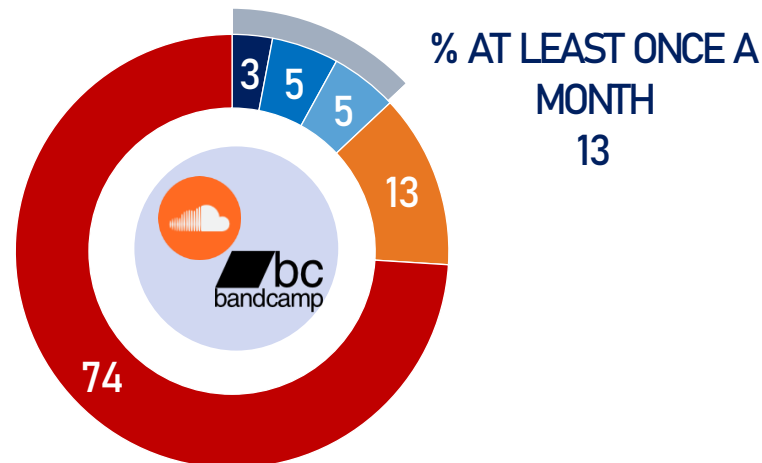
Question: "Over the past 12 months, have you listened to music on the following format?"

(Source: Those who listen to music, i.e. 94% of the sample)

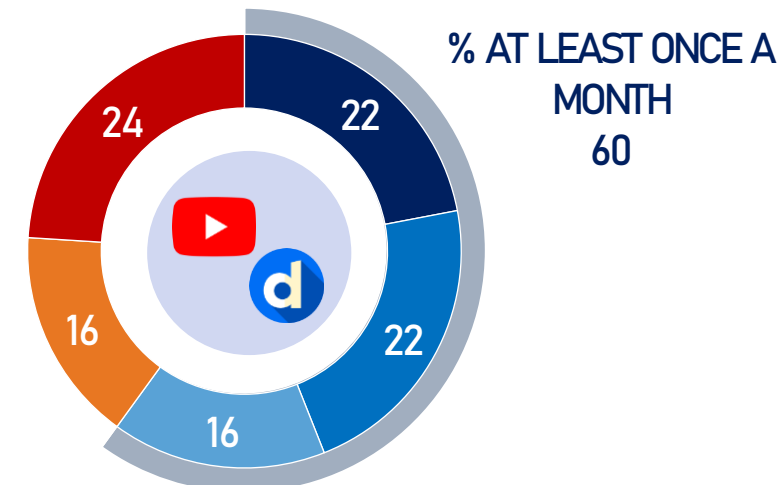
**Audio
streaming platforms**
(e.g. Deezer, Spotify, Qobuz)



**Collaborative music
streaming platforms**
(e.g. Bandcamp, SoundCloud)



**Video
streaming platforms**
(e.g. YouTube, DailyMotion*, Twitch)



73% listen to music at least once a month
on at least one type of streaming platform

YES, EVERY DAY OR ALMOST

YES, 1 TO 3 TIMES A WEEK

YES, 1 TO 3 TIMES A MONTH

LESS OFTEN

NEVER

*Survey carried out before DailyMotion's brand repositioning

Those who listen to music via audio and video streaming platforms (all platforms combined) tend to be younger than the average French music-listener, but have relatively few pronounced characteristics socio-demographically and in terms of music engagement



+ Of those who listen to music on audio and video streaming platforms (all platforms combined) at least once a month (i.e. 73 % of those who listen to music)...

Over-represented profiles in terms of music engagement



Music occupies a very important place for **41 %** of them
(vs 31 % of all French people)



On average, listen to **2 hrs 34 mins** of music every day
(vs 2 hrs 11 mins for all French people)



On average, listen on **7 different formats** every month
(vs 6 for all those who listen to music)



54 % have been to at least one concert over the past 12 months
(vs 47 % of all those who listen to music)



37 % have been to at least one festival over the past 12 months
(vs 40% of all those who listen to music)

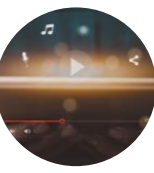
Over-represented socio-demographic profiles



58 % are under 45 *(vs 45 % of all French people)*

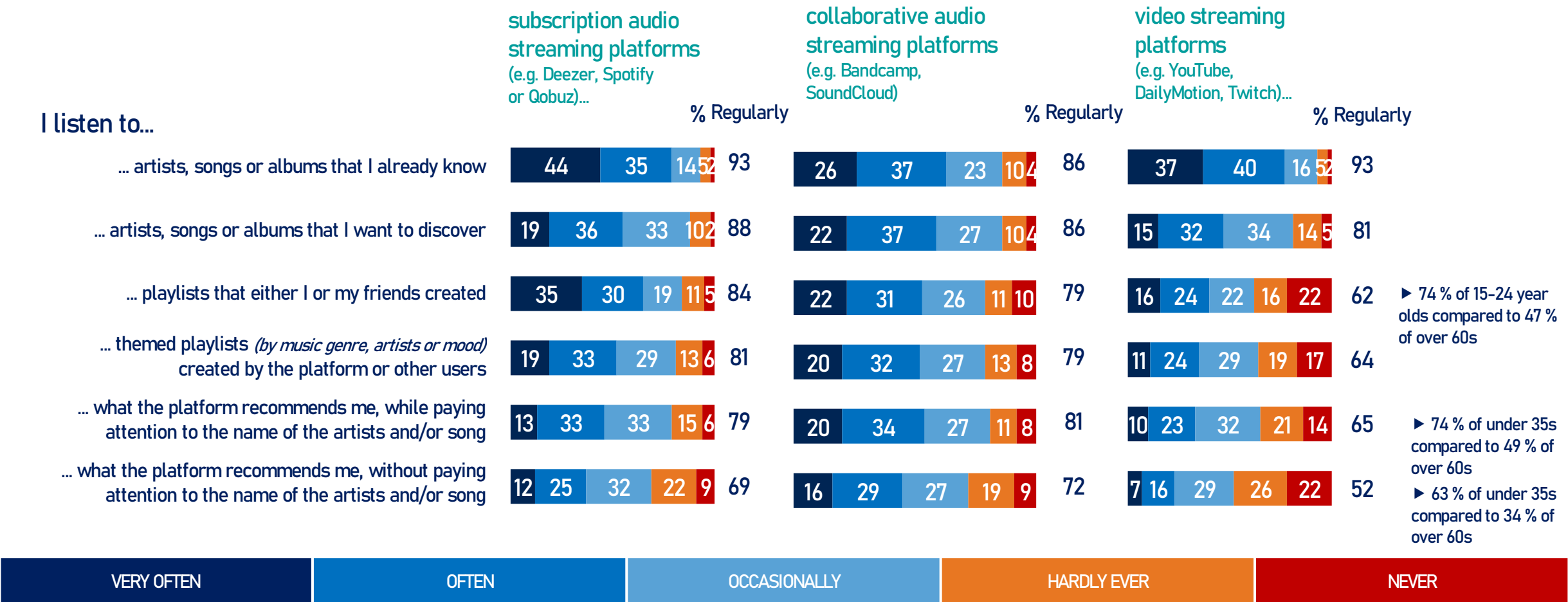


65 % are in employment *(vs 57 %)*



While listeners use streaming platforms to listen to artists they already know, the majority of listeners also use these platforms to discover new artists, especially via recommendations and playlists created by the platform

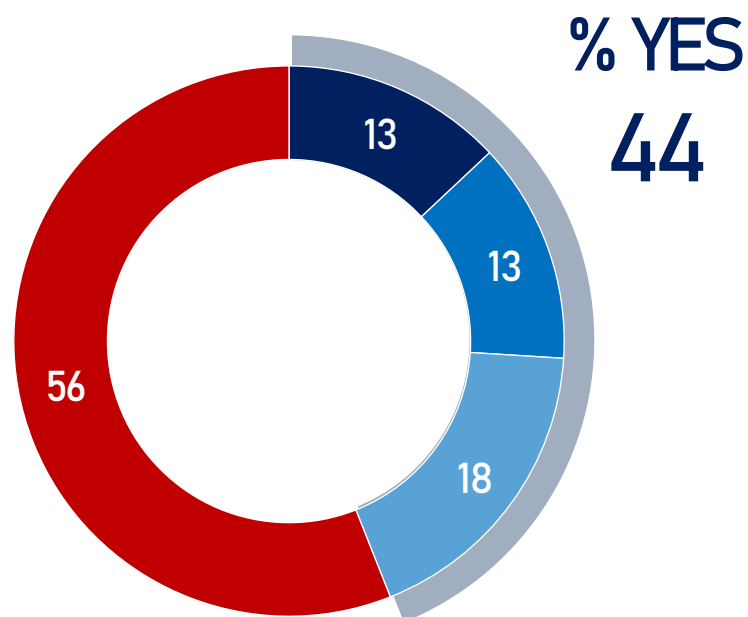
Question: “When I listen to music on...”
(Source: Those who listened to music on each of the formats at least once over the past 12 months)



More than 2 in 5 streaming platform users say they have already used these formats to watch or listen to concerts

Question: "Over the past 12 months, have you listened to/watched live concerts via audio streaming platforms (e.g. Spotify, Deezer, Qobuz) and/or video streaming platforms (e.g. YouTube, DailyMotion, Twitch, Arte Concert, Culturebox)?"

(Source: Those who listened to music on audio or video streaming platforms at least once a month over the past 12 months, i.e. 68% of the sample)



GENDER					% YES
Male	13	15	16	56	44
Female	12	11	20	57	43
AGE					
15-24	15	19	17	49	51
25-34	13	15	16	56	44
35-44	12	13	17	58	42
45-59	11	11	19	59	41
60+	11	9	20	60	40
SOCIO-ECONOMIC CATEGORY					
Higher managerial	13	14	12	61	39
Intermediate	10	11	21	58	42
Skilled worked	13	17	18	52	48
Unskilled workers	13	9	18	60	40
Retired	11	10	19	60	40
BY PLATFORM TYPE					
Audio	14	16	18	52	48
Collaborative audio	26	34	20	20	80
Video	14	14	19	53	47
BY LISTENING FREQUENCY					
Very regularly	21	22	21	36	64
Fairly regularly	11	11	16	62	38
Moderate	6	8	17	69	31

YES, ONCE OR
MORE THAN ONCE A MONTH

YES, 4 TO 11 TIMES

YES, 1 TO 3 TIMES

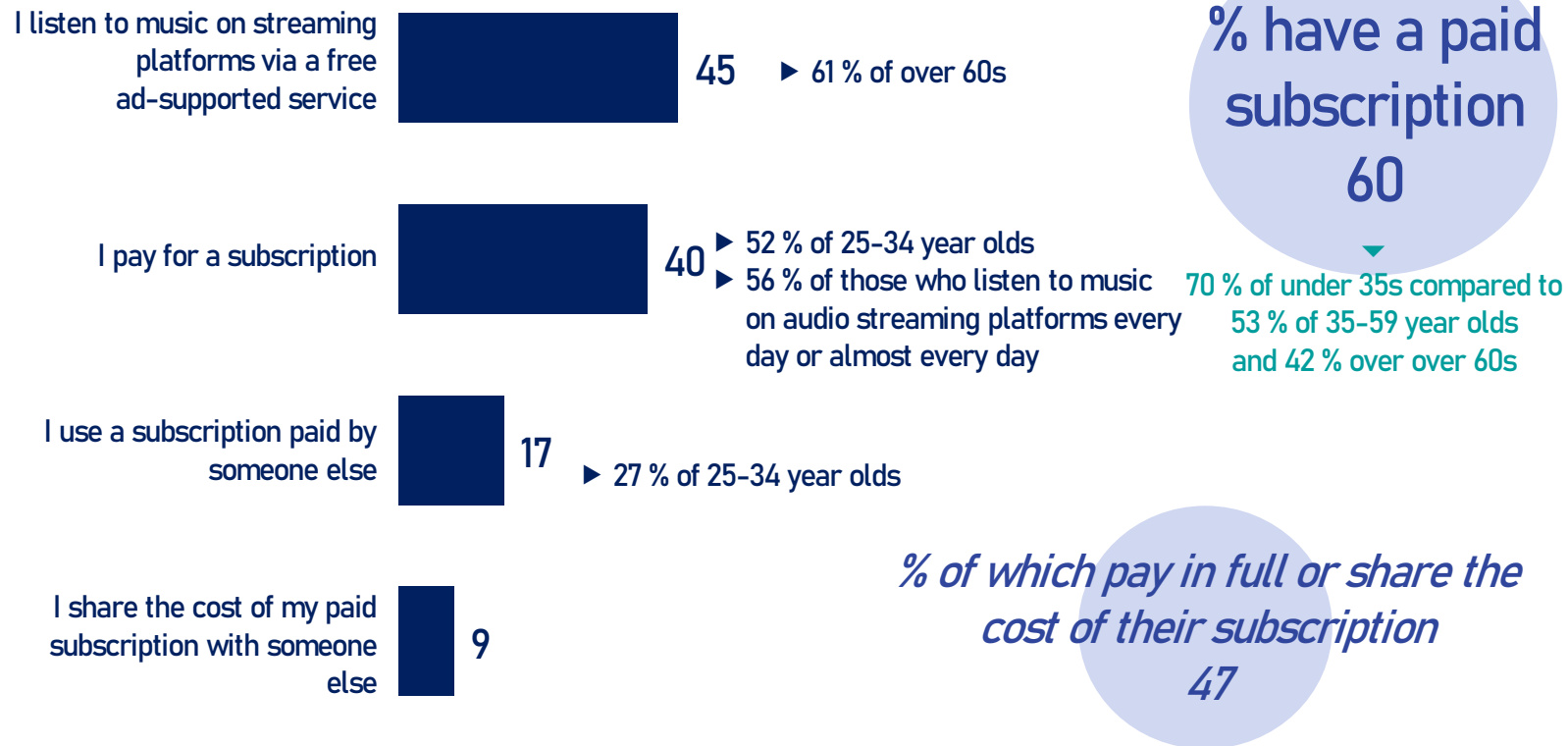
NO, NOT OVER THE PAST 12 MONTHS

3 out of 5 French people who listen to music on audio streaming platforms use a paid subscription (most often at their own expense)



Question: "For the audio streaming platforms you use (e.g. Spotify, Deezer, Qobuz), how would you describe your situation?"

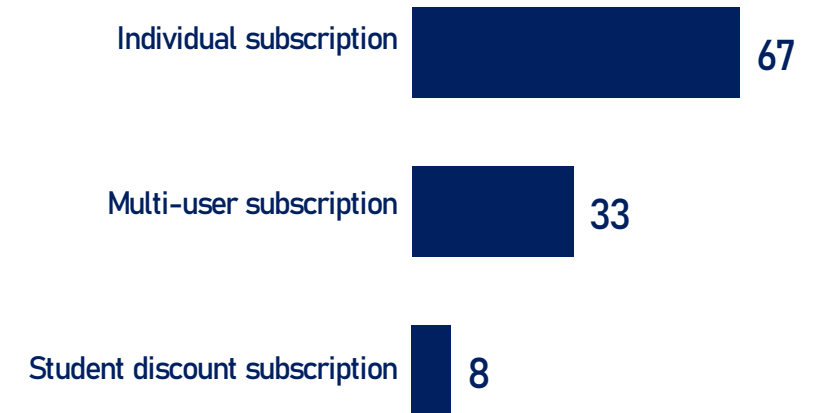
(Source: Those who listened to music on audio platforms at least once a month over the last 12 months, i.e. 44% of the sample) – Total greater than 100 as several answers possible



Question: "More specifically, what type(s) of subscription services are you paying for?"

(Source: Those who pay for an audio streaming platform subscription, i.e. 17% of the sample)

– Total greater than 100 as several answers possible

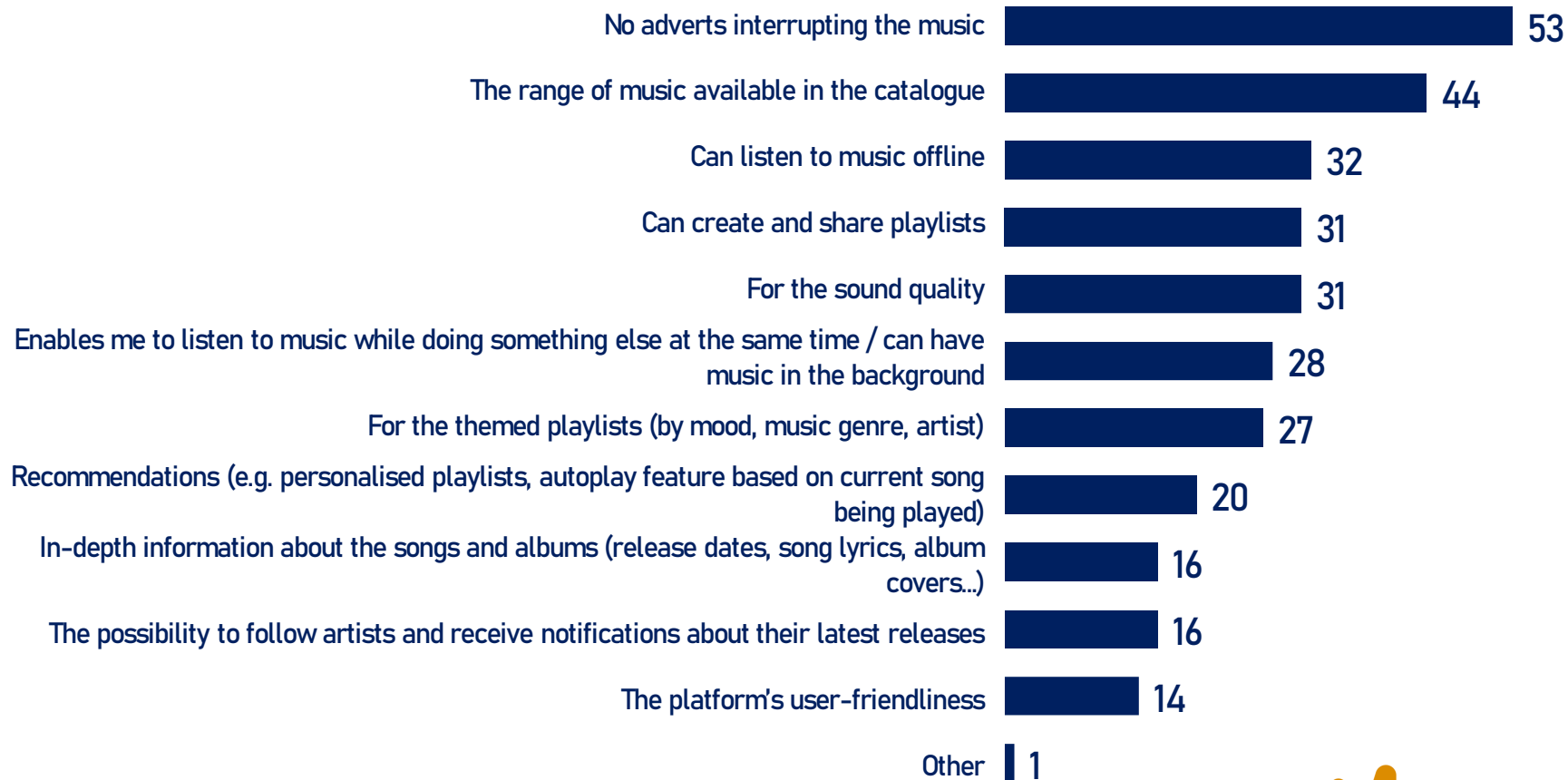


The main reason why people pay to subscribe to audio streaming platforms is to avoid having adverts interrupting the music, followed by the music catalogue available



Question: "What are the main reasons why you listen to music online on a subscription audio streaming service (e.g. Spotify, Deezer, Qobuz)?"

(Source: Those who listened to music on audio streaming platforms at least once a month over the past 12 months via a paid subscription, whether they paid for it themselves or not, i.e. 26% of the sample) – Total greater than 100 as four answers possible

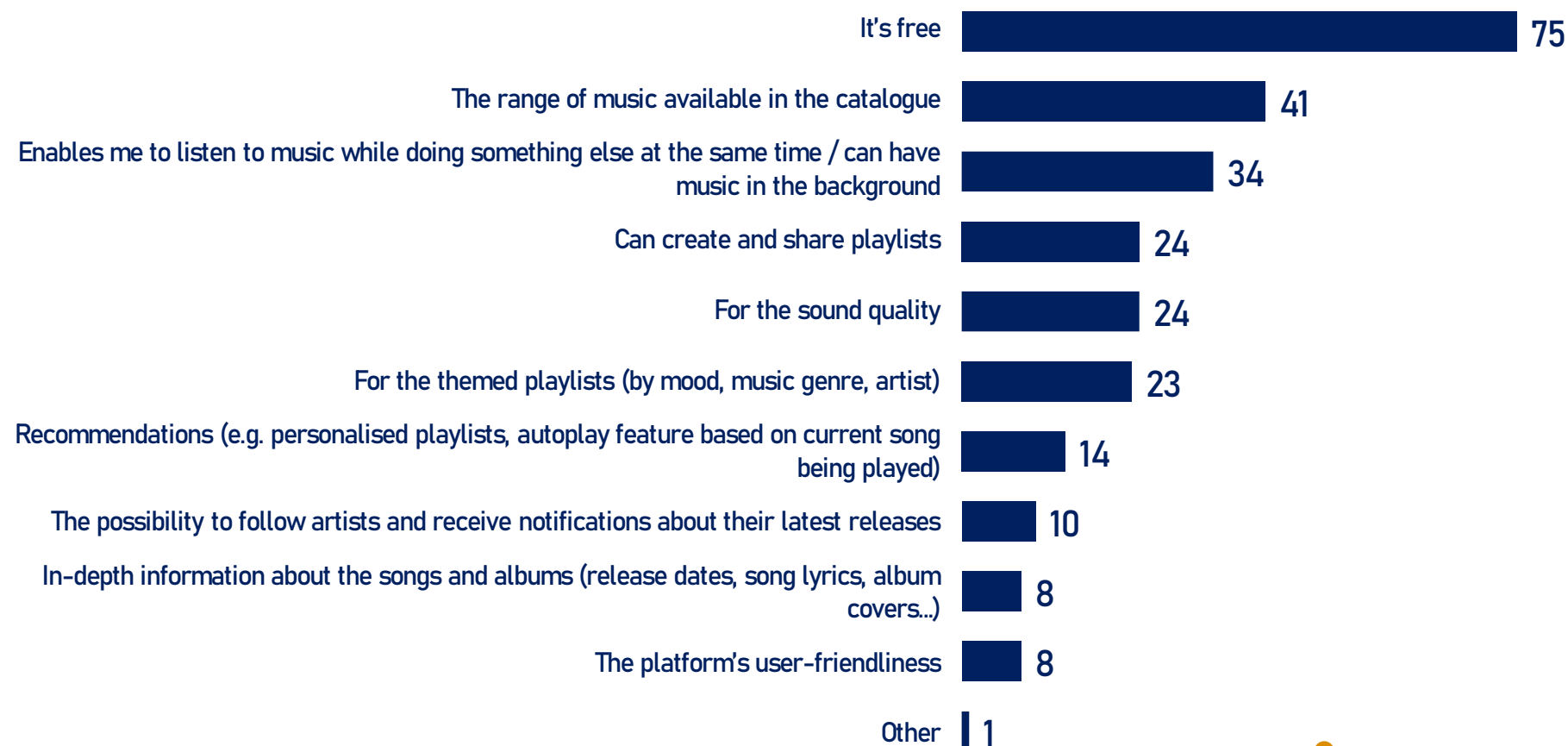


While the majority of audio streaming platforms users listen to music via a paid subscription, free ad-supported access remains a major pulling factor for other listeners to use these types of platforms

Question: "What are the main reasons why you listen to music online using free ad-supported access to audio streaming platforms (e.g. Spotify, Deezer, Qobuz)?"

(Source: Those who listened to music on audio streaming platforms via free access, i.e. 20% of the sample)

Total greater than 100 as four answers possible



Video streaming platform listeners tend to be younger than the average music listener, but have relatively few pronounced characteristics socio-demographically and in terms of music engagement



Of those who listen to music via video streaming (all platforms combined) at least once a month (i.e. 60% of those who listen to music)...

Over-represented profiles in terms of music engagement



Music occupies a very important place for **44 %** of them
(vs 31% of all French people)



On average, listen to **2 hrs 39 mins** of music every day
(vs 2 hrs 11 mins for all French people)



On average, listen on **8 different formats** every month
(vs 6 for all those who listen to music)



55 % have been to a concert at least once in the past 12 months
(vs 47% of all those who listen to music)



39 % have been to a festival at least once in the past 12 months
(vs 30 % of all those who listen to music)

Over-represented socio-demographic profiles



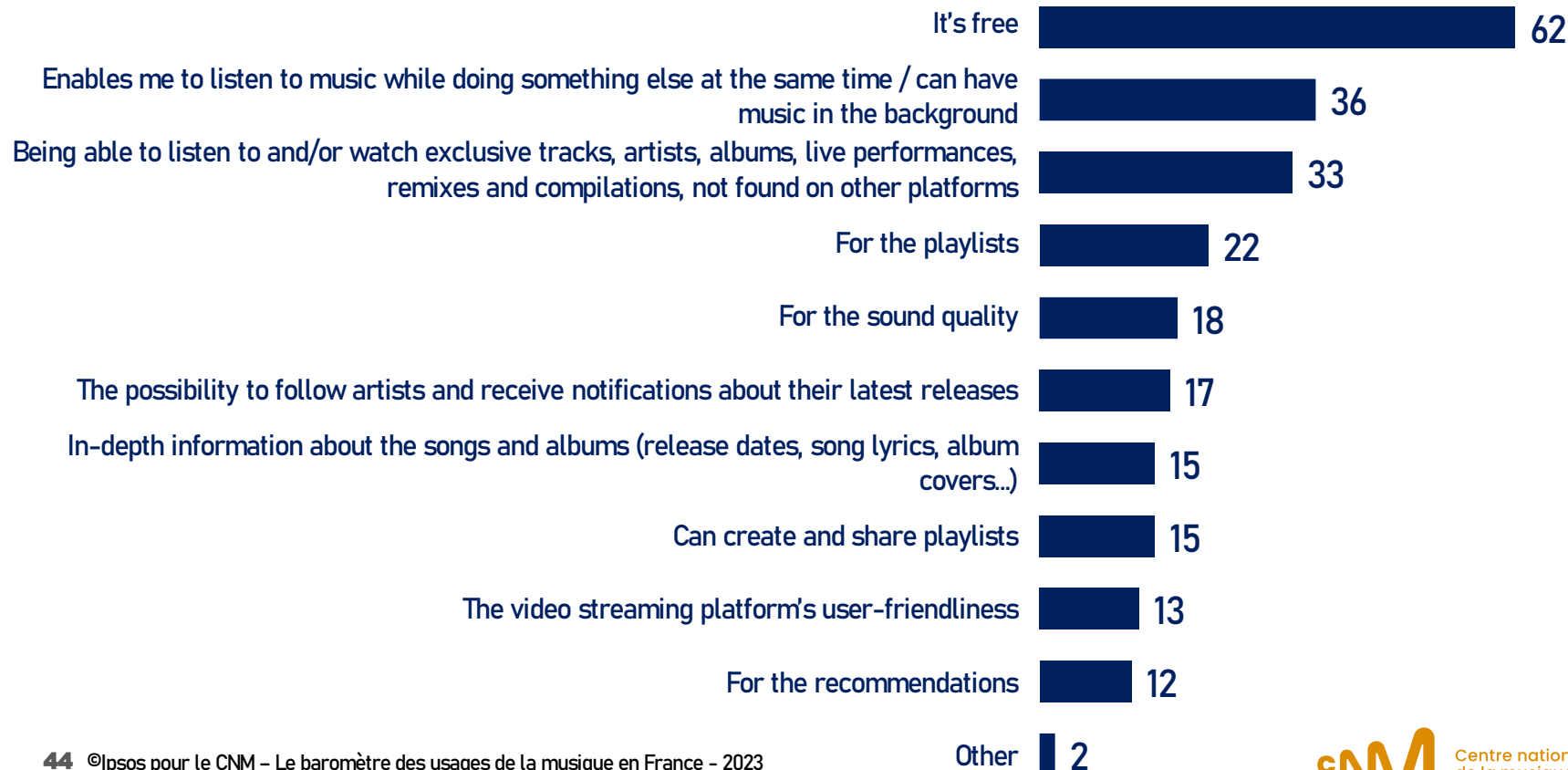
58 % are under 45 *(vs 45 % of all French people)*




66 % are in employment *(vs 57 %)*

The main reason why people use video platforms to listen to music is because it's free, but other elements also play an important role, such as the diversity of content on offer (live music, remixes, albums) and playlists

Question: "What are the main reasons why you listen to music online on a video streaming platform (e.g. YouTube, DailyMotion, Twitch)?"
(Source: Those who listened to music on video streaming platforms at least once a month over the past 12 months, i.e. 56% of the sample)
– Total greater than 100 as four answers possible








Listeners via collaborative audio streaming platforms tend to be male, young, employed, social grade AB+, living in the Paris region... and avid music lovers

 Of those who listen to music via collaborative audio streaming platforms (e.g. Bandcamp, SoundCloud, etc.) at least once a month (i.e. 13 % of those who listen to music)...

Over-represented profiles in terms of music engagement

-  Music occupies a very important place for **62 %** of them *(vs 31 % of all French people)*
-  On average listen to **3 hrs 20 mins** of music every day *(vs 2 hrs 11 mins for all French people)*
-  On average listen on **13 different formats** per month *(vs 6 for those who listen to music)*
-  **84 %** have been to at least one concert in the past 12 months *(vs 47 % for all those who listen to music)*
-  **76 %** have been to at least one festival in the past 12 months *(vs 30 % for all those who listen to music)*
-  **71 %** currently play an instrument or practice singing *(vs 34 % of all French people)*

Over-represented socio-demographic profiles

-  **61 %** are men *(vs 48 % of all French people)*
-  **81 %** are under 45 *(vs 45 %)*
-  **78 %** are in employment *(vs 57 %)*
-  **46 %** are social grade AB+ *(vs 29 %)*
-  **31 %** live in the Paris region *(vs 19 %)*

Breakdown of music listening habits for collaborative audio streaming platform listeners: they consume (digitally, physical formats and live shows) much more regularly than the average music listener



Compared to all French people who listen to music and on all formats combined, at least once a month collaborative audio streaming platforms listeners (i.e. 13% of those who listen to music)...



... are **4.6** times more likely to listen to cassette tapes



... are **3.5** times more likely to listen to internet radio



... are **3.3** times more likely to listen to music podcasts



... are **3.2** times more likely to listen to music in video games



... are **3.1** times more likely to listen to vinyls



... are **3.9** times more likely to go to major festivals

... are **3.3** times more likely to go to small- and medium-sized festivals

... are **2.9** times more likely to go to boutique festivals



... are **3.2** times more likely to go to concerts in theatres, cultural centres, youth clubs or community centres

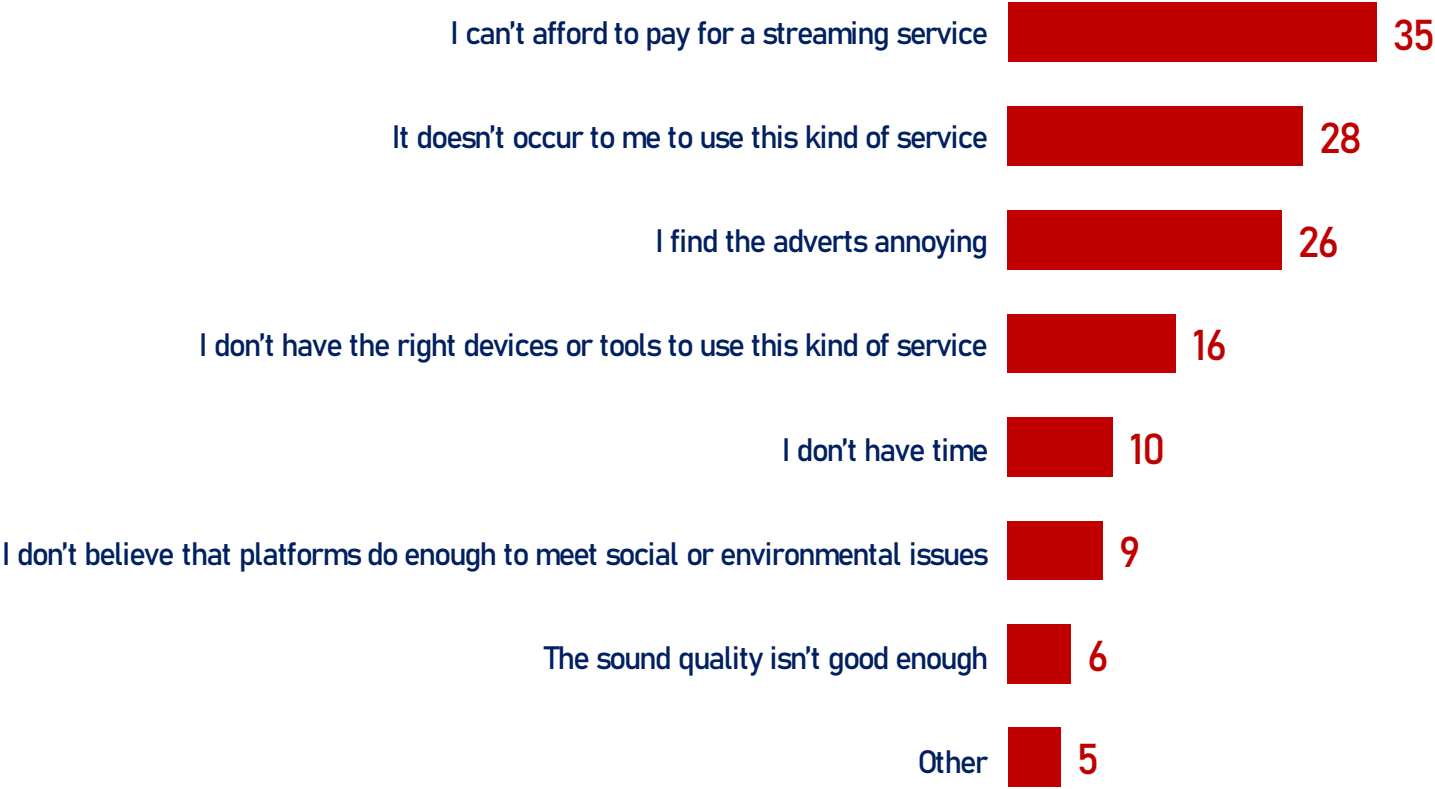
The reasons why people listen to music on collaborative audio platforms are rather varied. Free access remains an important pulling factor, but these platforms' other specific features, such as hosting exclusive songs or fewer adverts present, also play a crucial role.

Question: "What are the main reasons why you listen to music online via collaborative audio platforms (e.g. Bandcamp, SoundCloud)?"
(Source: Those who listened to music on collaborative platforms at least once a month over the past 12 months, i.e. 11% of the sample)
– Total greater than 100 as four answers possible



While the main reason for not listening to or not listening often to music on streaming platforms is due to lack of financial means, other main reasons given include not being in the habit of doing so and a dislike for adverts

Question: “What are the main reasons why you don’t listen to or don’t listen often to music online via streaming platforms?”
(Source: Those who listen to music but have listened to music less than once a month or not at all on streaming platforms over the past 12 months, i.e. 26% of the sample)
- Total greater than 100 as four answers possible



**Due to the weak sources for these two age groups (33 and 34 interviews), the results should be interpreted with caution.

PART 5

FOCUS: PHYSICAL MUSIC FORMATS



GAME CHANGERS

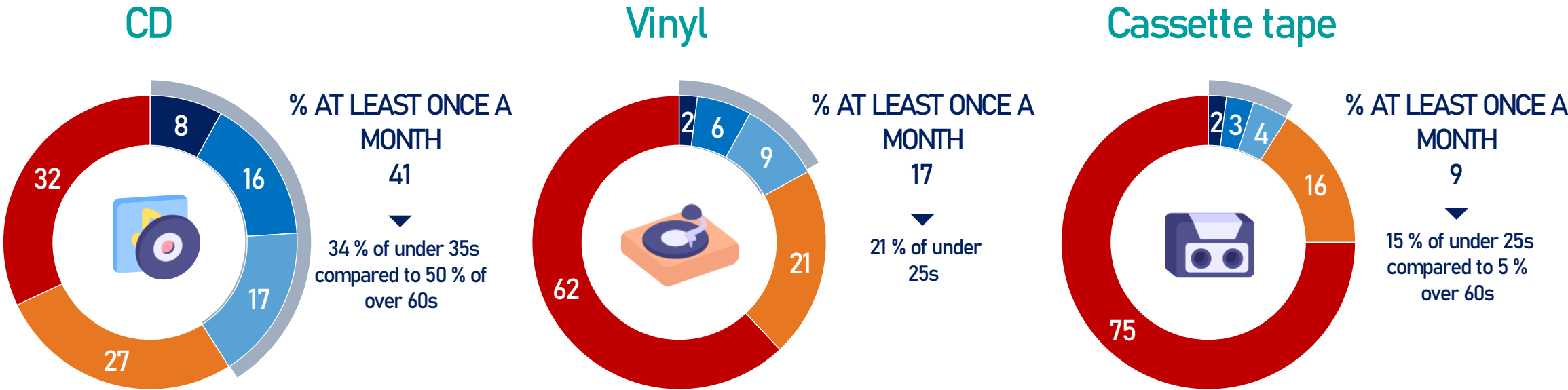


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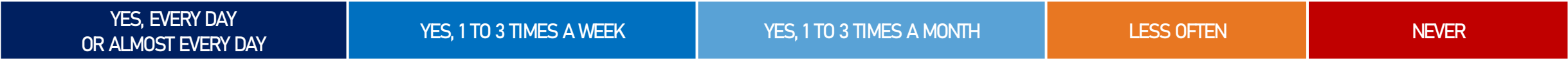
Less than 1 in 2 French people who listen to music do so regularly via a physical format



Question: "Over the past 12 months, have you listened to music on the following formats?"
(Source: Those who listen to music, i.e. 94% of the sample)



45 % listen to music at least once a month on at least one type of physical format



Those who listen to music on physical formats have a relatively similar profile to the average French music listener



Of those who listen to music on a physical format at least once a month
(i.e. 45 % of people who listen to music)...

Over-represented profiles in terms of music engagement



46 % currently play an instrument or practice singing
(vs 34% of all French people)



On average listen to 2 hrs 36 mins of music every day
(vs 2 hrs 11 mins for all French people)



On average listen on 8 different formats every month
(vs 6 for all those who listen to music)



60 % have been to at least one concert in the past 12 months
(vs 47% of all those who listen to music)



43 % have been to at least one festival in the past 12 months
(vs 30% of all those who listen to music)



No socio-demographic profiles are over-represented, be it in terms of gender, age, socio-economic category, level of education or place of residence.

However, there are certain differences concerning the most listened to music genres:



28 % rank classical music in their top 5 most listened to recorded music genres
(vs 22% of those who listen to recorded music)

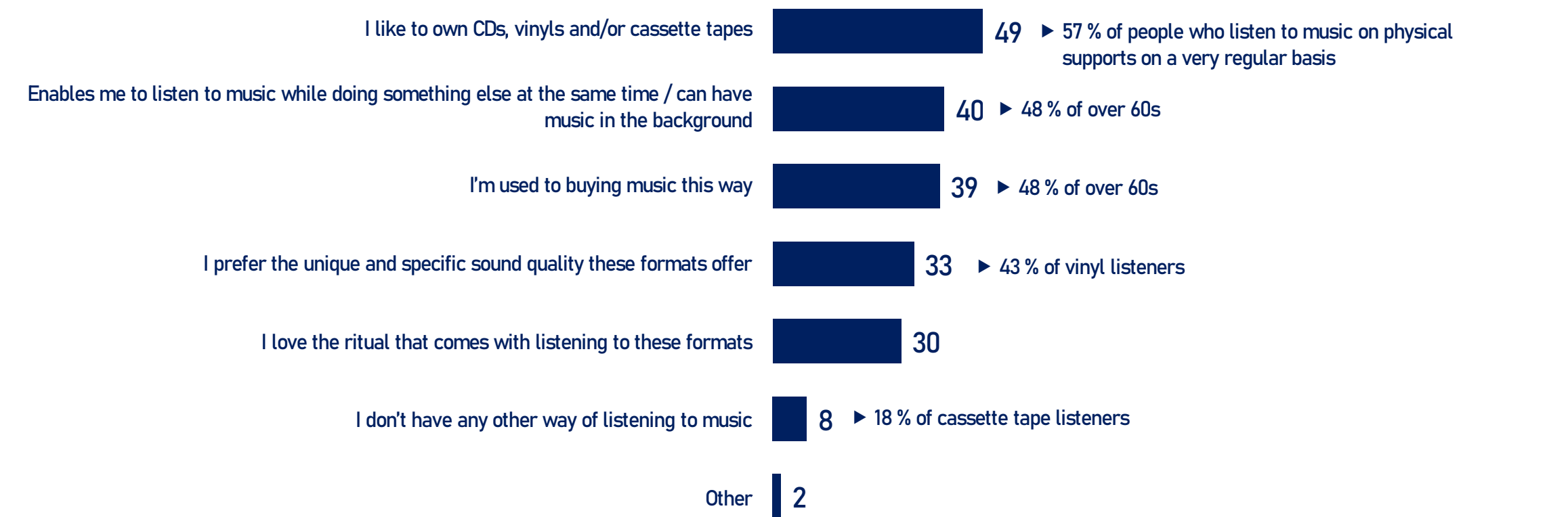


26 % rank jazz-blues in their top 5 most listened to recorded music genres
(vs 21% of those who listen to recorded music)



The main reason given for listening to music on physical formats is the emotional attachment to owning physical music objects like CDs, vinyls or tapes

Question: "What are the main reasons why you listen to music on physical formats (CDs, vinyls, cassette tapes, etc.)?"
(Source: Those who listened to music on physical formats at least once a month over the past 12 months, i.e. 42% of the sample)
– Total greater than 100 as three answers possible



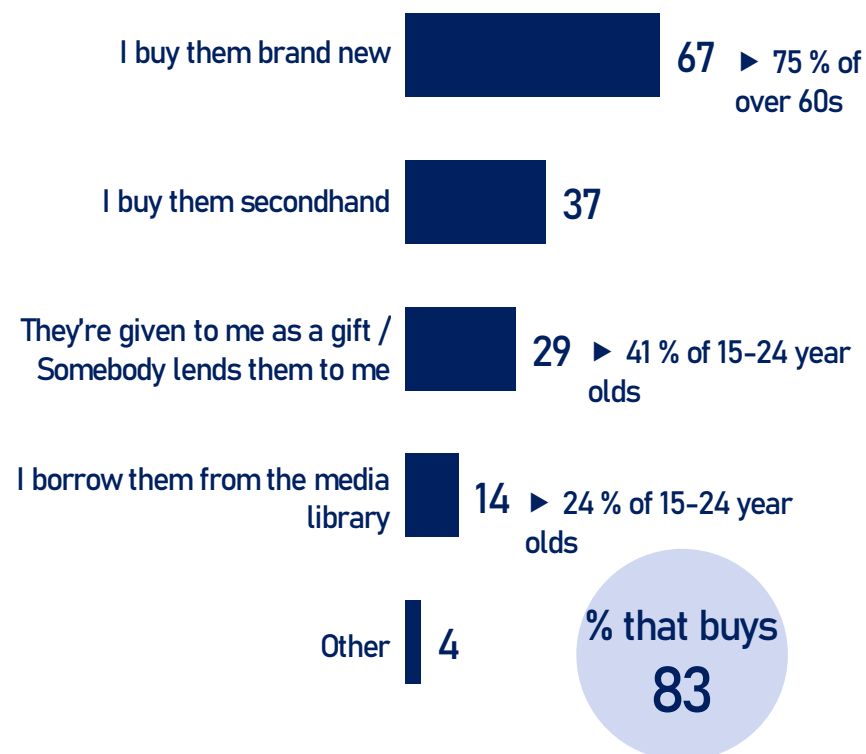
Physical music listeners generally purchase their CDs, vinyl and/or cassette tapes brand new, and most often at major retailers or online



Question: "How do you obtain the CDs, vinyl and/or cassette tapes that you listen to?"

(Source: Those who listened to music on physical formats at least once a month over the past 12 months, i.e. 42% of the sample)

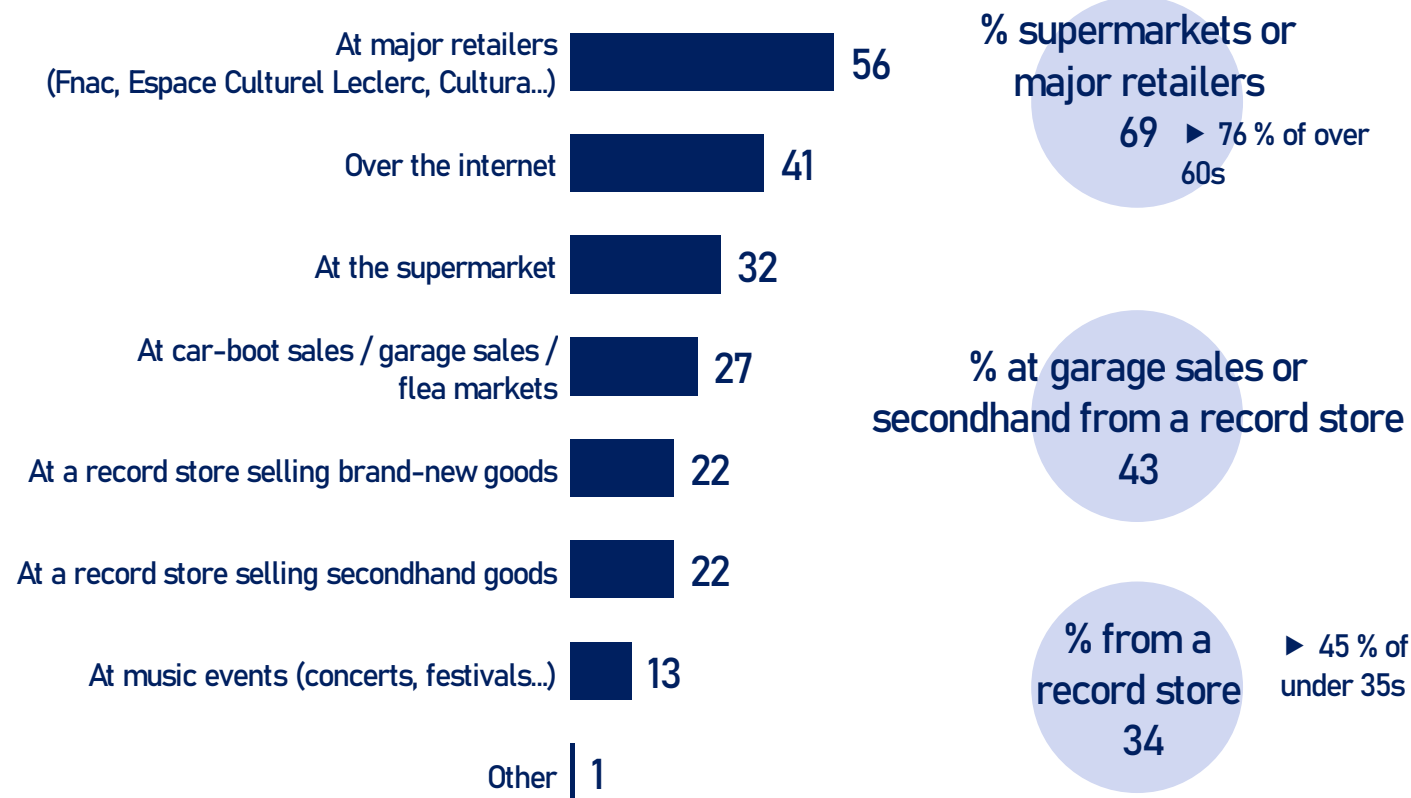
Total greater than 100 as several answers possible



Question: "Where do you buy your CDs, vinyl and/or cassette tapes from, regardless of whether they are new or secondhand?"

(Source: Those who buy new and/or secondhand physical formats, i.e. 35% of the sample)

- Total greater than 100 as several answers possible

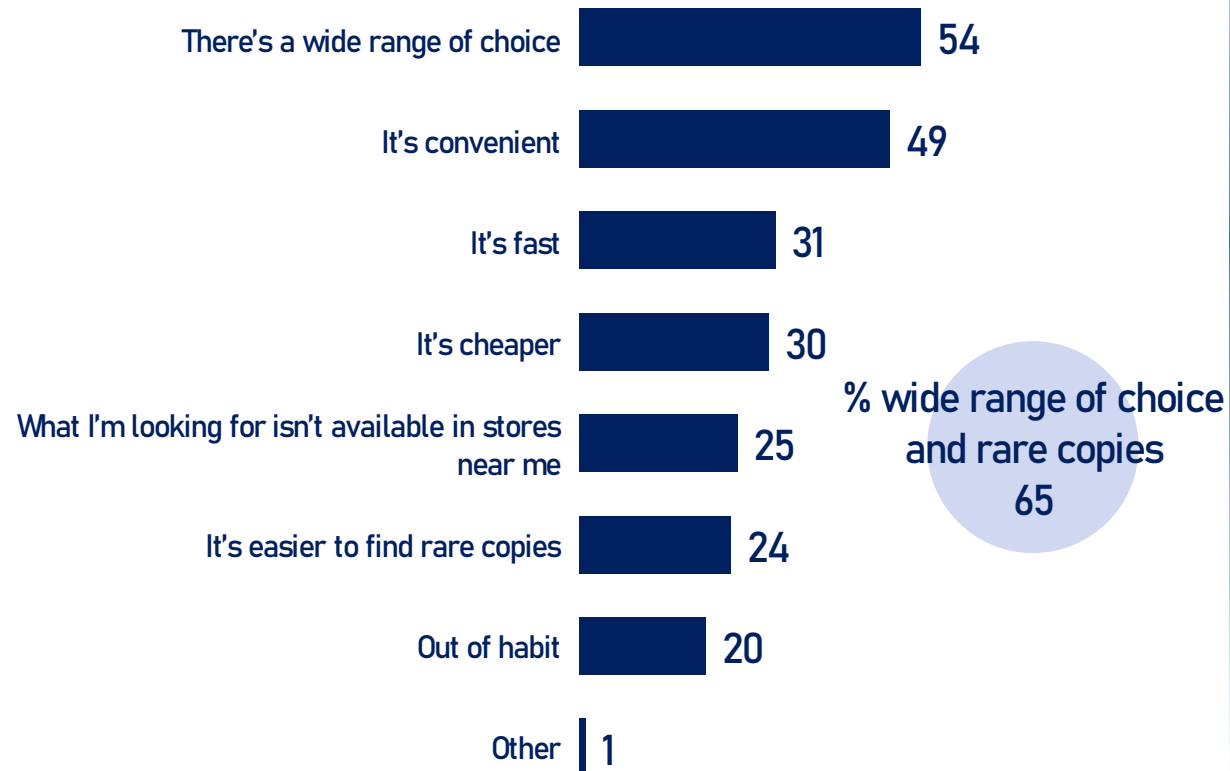


Those who buy online do so because it's convenient and there's a wide choice available. This differs from record store shoppers, who cite equally the specialist range on offer, the atmosphere, the human interaction, the great recommendations and the desire to support independent record stores.



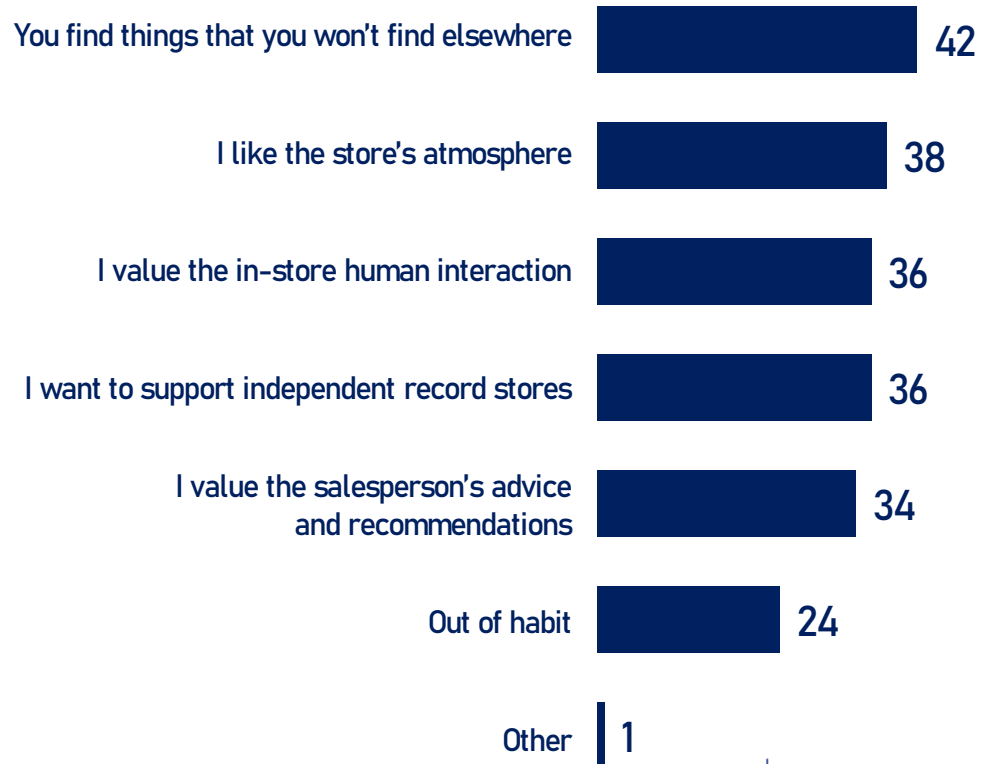
Question: "What are the main reasons why you buy your CDs, vinyl and/or cassette tapes on the internet?"

(Source: Those who buy new and/or secondhand physical formats on the internet, i.e. 14% of the sample) – Total greater than 100 as three answers possible



Question: "What are the main reasons why you buy your CDs, vinyl and/or cassette tapes from record stores?"

(Source: Those who buy new and/or secondhand physical formats from record stores, i.e. 12% of the sample) – Total greater than 100 as three answers possible





The main reasons why people don't listen often or to music on physical formats is because they consider them impractical or they don't have the suitable equipment

Question: "What are the main reasons why you don't listen often or never to music on a physical format (CDs, vinyl and/or cassette tape)?"

(Source: Those who listen to music but have listened to music less than once a month or not at all on physical formats over the past 12 months, i.e. 52% of the sample) – Total greater than 100 as two answers possible



PART 6

FOCUS: RADIO AND PODCASTS



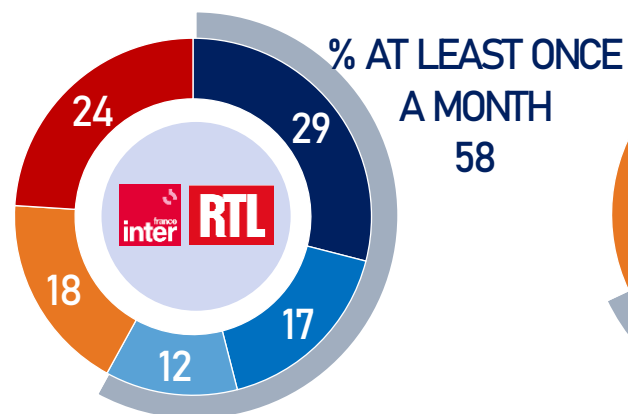
More than 4 in 5 French people who listen to music do so on the radio at least once a month

Question: "Over the past 12 months, have you listened to music on the following formats?"

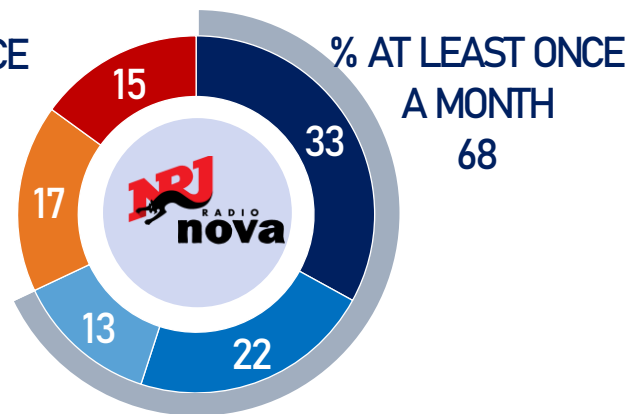
(Source: Those who listen to music, i.e. 94% of the sample)



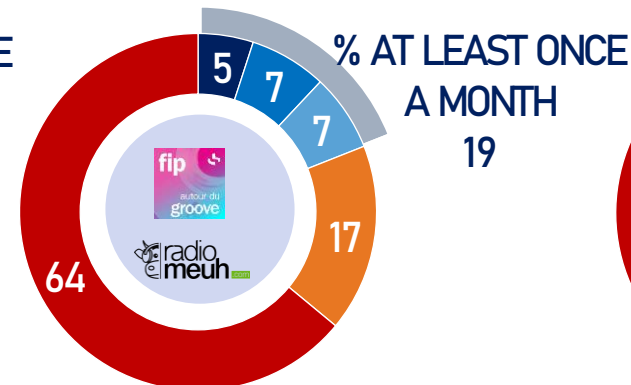
Generalist radio stations
(e.g. France Inter, RTL)



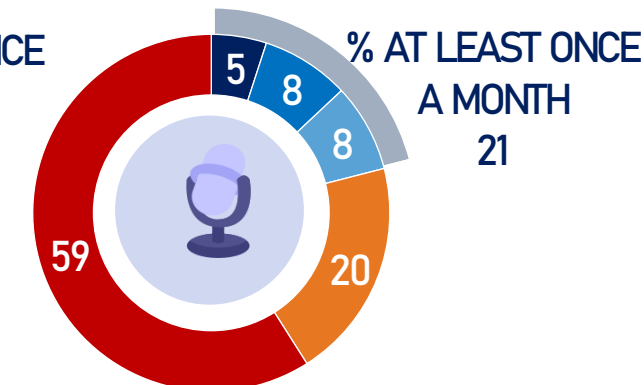
Music radio stations
(e.g. NRJ, Radio Nova)



Internet radio
(stations only accessible via the internet, such as Fip Groove, Radio Meuh)



Music podcasts
(native or on-demand music shows)



85 % listen to music at least once a month on at least one of these formats

82 % listen specifically via a radio station (generalist or music)

29 % via internet radio or music podcasts

YES, EVERY DAY OR ALMOST EVERY DAY

YES, 1 TO 3 TIMES A WEEK

YES, 1 TO 3 TIMES A MONTH

LESS OFTEN

NEVER

People who listen to music on the radio (generalist and music stations) tend to have profiles and listening habits very similar to the average French music listener



Amongst those who listen to music on a generalist or music radio at least once a month
(i.e. 82 % of those who listen to music)

Over-represented profiles in terms of music engagement



On average listen to **2 hrs 23 mins** of music a day
(vs 2 hrs 11 mins for all French people)



On average listen on **7 different formats** each month
(vs 6 for those who listen to music)



No socio-demographic profiles are over-represented by it in terms of gender, age, socio-economic category, level of education or place of residence.

However, there are certain differences concerning the most listened to music genres:

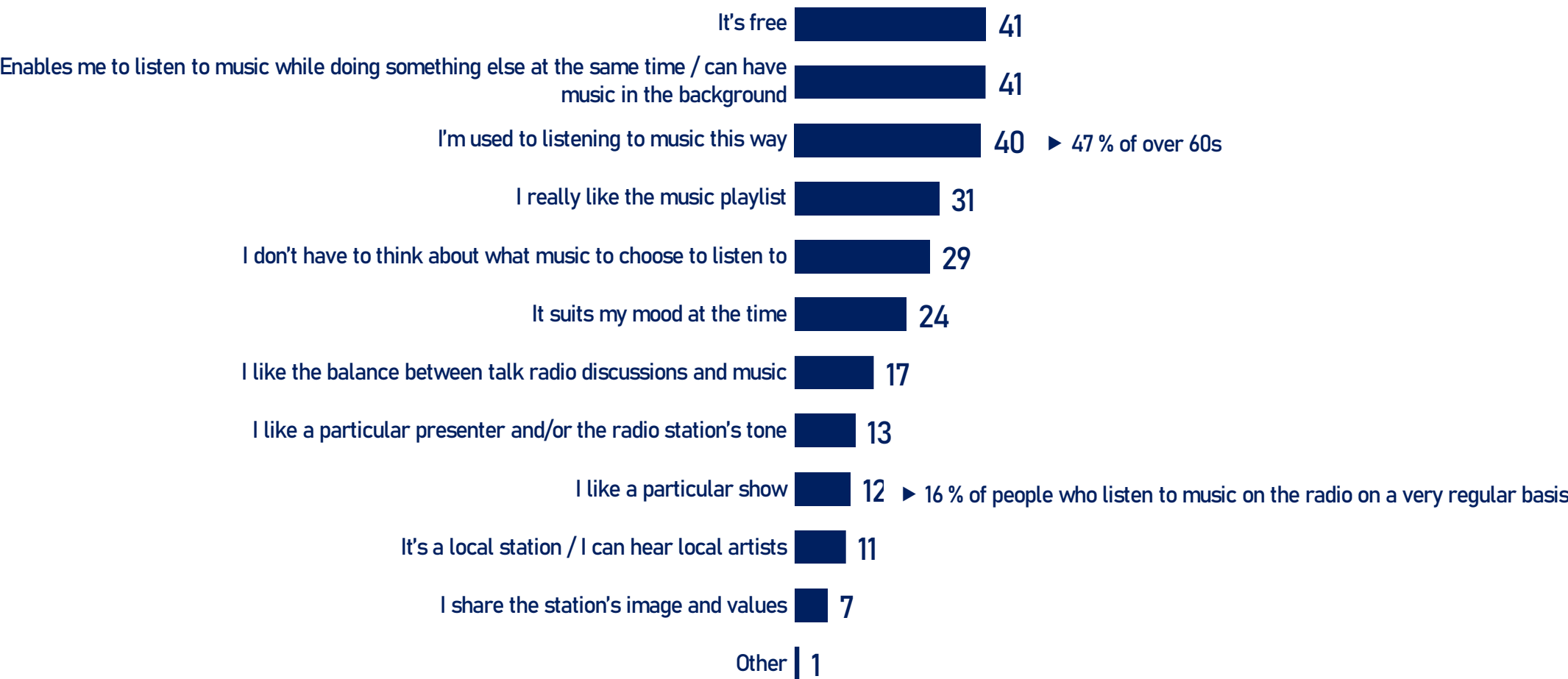


70 % rank variety pop / chanson française in their top 5 most listened to recorded music genres
(vs 67 % of those who listen to recorded music)



The main reasons given for listening to music on the radio is that it's free, it's easy to have it playing in the background and (especially for older people) it's a force of habit

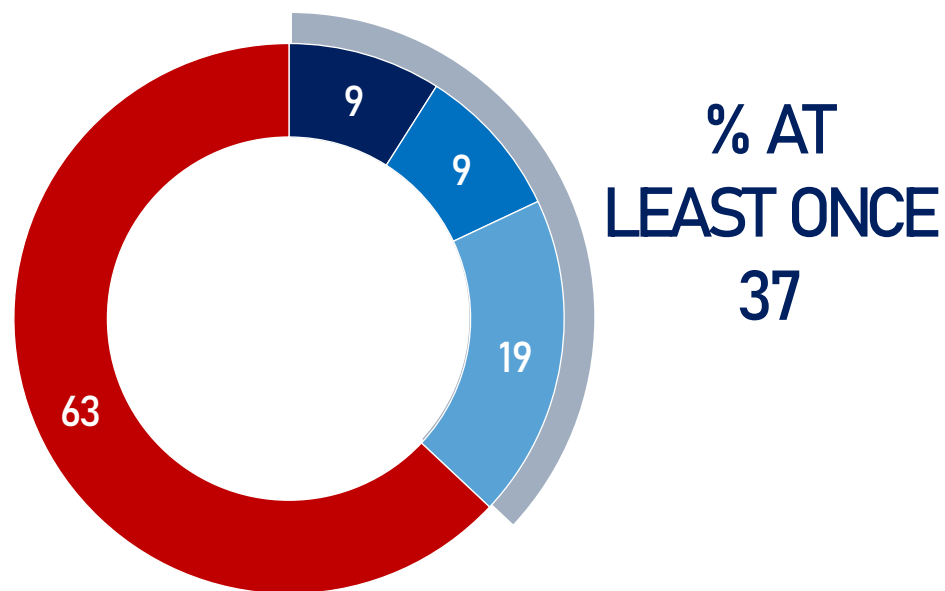
Question: "What are the main reasons why you listen to music on live radio (FM, DAB+ or internet)?"
(Source: Those who listened to music on the radio at least once a month over the past 12 months, i.e. 78% of the sample) – Total greater than 100 as four answers possible



More than a third of people who listen to music on the radio say they have already listened to a concert on this format over the past 12 months

Question: "Over the past 12 months, have you listened to live concerts on the radio (artist invited to perform a few songs on a show, broadcast of a live concert, etc.)?"

(Source: Those who listened to music on the radio at least once a month over the past 12 months, i.e. 78% of the sample)



GENDER					% YES
Male	9	12	18	61	39
Female	8	8	19	65	35
AGE					
15-24	13	19	22	46	54
25-34	12	15	15	58	42
35-44	10	11	18	61	39
45-59	7	6	18	69	31
60+	6	5	20	69	31
SOCIO-ECONOMIC CATEGORY					
Higher managerial	10	15	19	56	44
Intermediate	8	9	19	64	36
Skilled workers	11	10	19	60	40
Unskilled workers	9	8	18	65	35
Retired	6	6	20	68	32
BY LISTENING FREQUENCY					
Very frequently	14	17	24	45	55
Rather frequently	6	6	17	71	29
Moderate	3	4	12	81	19

YES, ONCE A MONTH
OR MORE THAN ONCE A MONTH

YES, 4 TO 11 TIMES

YES, 1 TO 3 TIMES

NO, NOT DURING THE PAST 12 MONTHS



The main reasons for not listening to music on the radio are that some people just don't listen to the radio at all, they find the adverts annoying and, to a lesser extent, not being able to choose what music is played

Question: "What are the main reasons why you don't listen to or don't listen very often to music on the radio?"
(Source: Those who listened to music less than once a month or not at all on the radio over the past 12 months, i.e. 16% of the sample)
– Total greater than 100 as three answers possible



Internet radio listeners tend to be male, have a higher social-economic grade than the average French person, and are also bigger music fans



Of those who listen to music on internet radio or music podcasts at least once a month (i.e. 19 % of those who listen to music)...

Over-represented profiles in terms of music engagement



Music occupies a very important place for **52 %** of them
(vs 31 % of all French people)



On average listen to **3 hrs 17 mins** of music every day
(vs 2 hrs 11 mins for all French people)



On average listen on **11 different formats** every month
(vs 6 for those who listens to music)



73 % have been to at least one concert in the past 12 months
(vs 47 % of all those who listen to music)



62 % have been to at least one festival in the past 12 months
(vs 30 % of all those who listen to music)

Over-represented socio-demographic profiles



58 % are men (vs 48 % of all French people)



41 % are under 35 (vs 29 %)



59 % have completed higher education (vs 52 %)



74 % are in employment (vs 57 %)



42 % are social grade AB+ (vs 29 %)



26 % live in the Paris region (vs 19 %)

Breakdown of music listening habits for internet radio listeners: whatever the consumption practice, they do it more regularly than the average French person



+ Compared to all French people who listen to music on all formats combined, at least once a month internet radio listeners (i.e. 19 % of people who listen to music)...



... are **3.3** times more likely to listen to music on collaborative audio streaming platforms



... are **3.1** times more likely to listen to cassette tapes



... are **2.8** times more likely to listen to music podcasts



... are **2.4** times more likely to listen to concert recordings or broadcasts



... are **2.3** times more likely to listen to music on video games



... are **2.8** times more likely to go to major festivals

... are **2.5** times more likely to go to small- and medium-sized festivals

... are **2.3** times more likely to go to boutique festivals



... are **2.5** times more likely to go to concerts in theatres, cultural centres, youth clubs or community centres

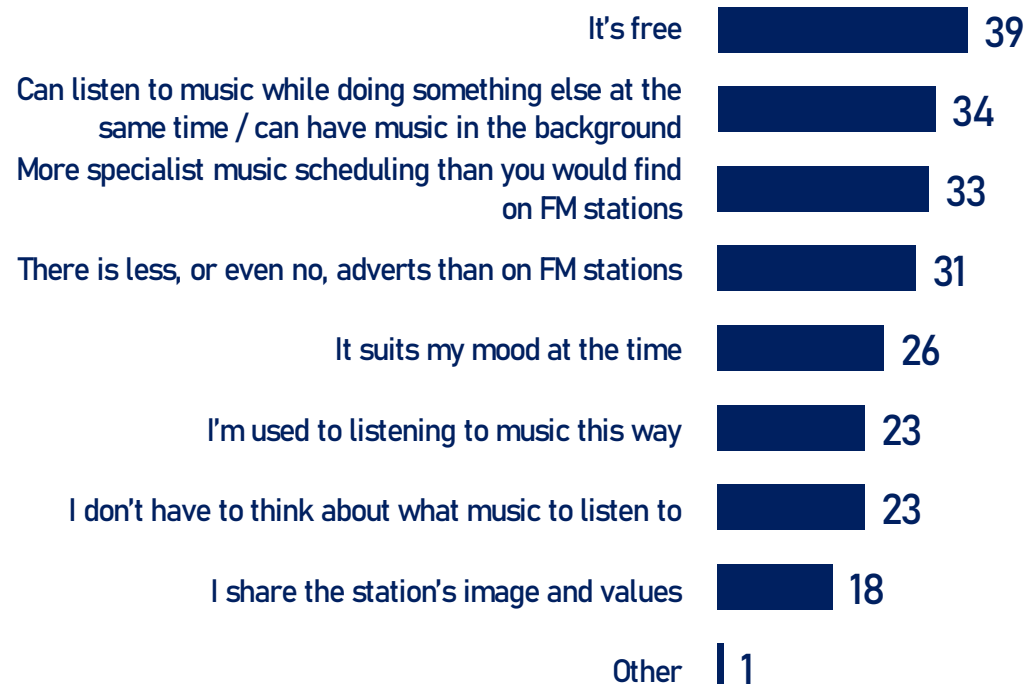
The reasons why people listen to internet radio are rather varied. One crucial factor is that they're free to listen to, but only a minority of listeners cite this reason. In fact, the distinctive features of these platforms, like their programming and rare ad breaks, are almost as important.



Question: "What are the main reasons why you listen to music on one or more internet radio stations (radio stations only accessible via the Internet, such as Fip Groove, Radio Meuh)?"

(Source: Those who listened to music on internet radio at least once a month over the past 12 months, i.e. 18% of the sample)

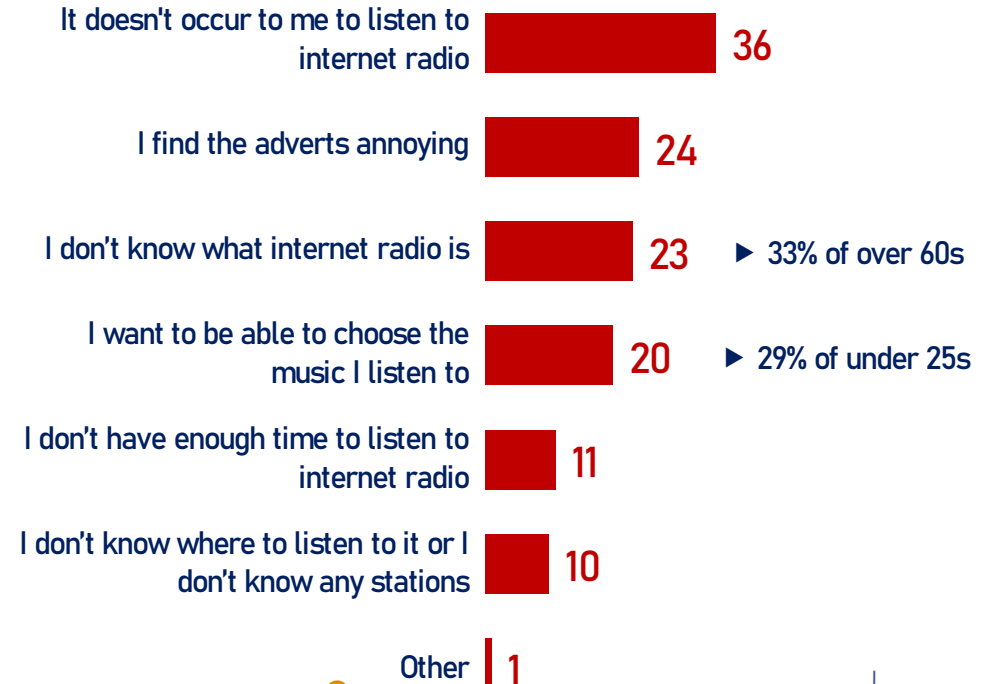
Total greater than 100 as four answers possible



Question: "What are the main reasons why you don't or hardly listen to music on internet radio?"

(Source: Those who listen to music but have listened to music less than once a month or not at all on internet radio over the past 12 months, i.e. 76% of the sample)

Total greater than 100 as two answers possible



Music podcast listeners tend to be big music fans, young and hold a university degree



Amongst those who listen to music podcasts at least once a month
(i.e. 21 % of those who listen to music)...

Over-represented profiles in terms of music engagement



Music occupies a very important place for **56 %** of them
(vs 31 % of French people)



On average listen to **3 hrs 8 mins** of music a day
(vs 2 hrs 11 mins for French people)



On average listen on **11 different formats** every month
(vs 6 for everyone who listens to music)



76 % have been to at least one concert in the past 12 months
(vs 47 % of all those who listen to music)



65 % have been to at least one festival in the past 12 months
(vs 30 % of all those who listen to music)



62% currently play an instrument or practice singing
(vs 34% of French people)

Over-represented socio-demographic profiles



49 % are under 35 (vs 29 %)



59 % have completed higher education (vs 52 %)



71 % are in employment (vs 57 %)



41 % are social grade AB+ (vs 29 %)



26 % live in the Paris region (vs 19 %)

Breakdown of music listening habits for music podcast listeners: they have much more regular “niche” practices than the average music listener



Compared to all French people who listen to music on all formats combined, at least once a month music podcast listeners (i.e. 21% of people who listen to music)...



... are **3.2** times more likely to listen to music on collaborative audio streaming platforms



... are **3.1** times more likely to listen to cassette tapes



... are **2.8** times more likely to listen to internet radio



... are **2.4** times more likely to listen to concert recordings or broadcasts



... are **2.3** times more likely to listen to music on video games



... are **2.3** times more likely to listen to vinyl



...are **2.8** times more likely to go to major festivals

...are **2.5** times more likely to go to small- or medium-sized festivals

...are **2.3** times more likely to go to boutique festivals

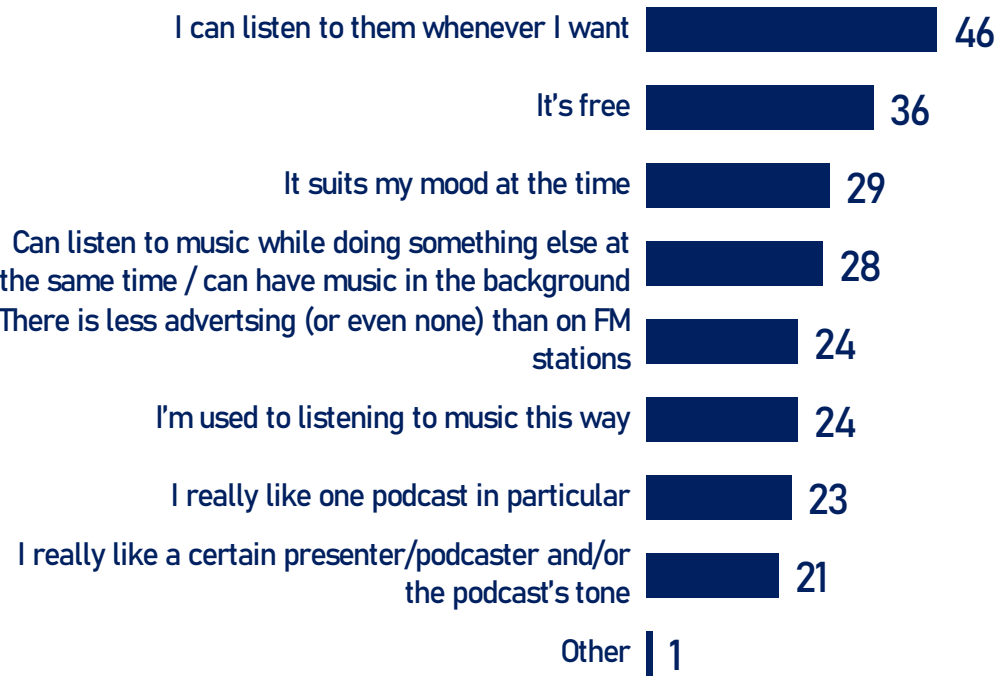


...are **2.5** times more likely to go to concerts in theatres, cultural centres, youth clubs or community centres

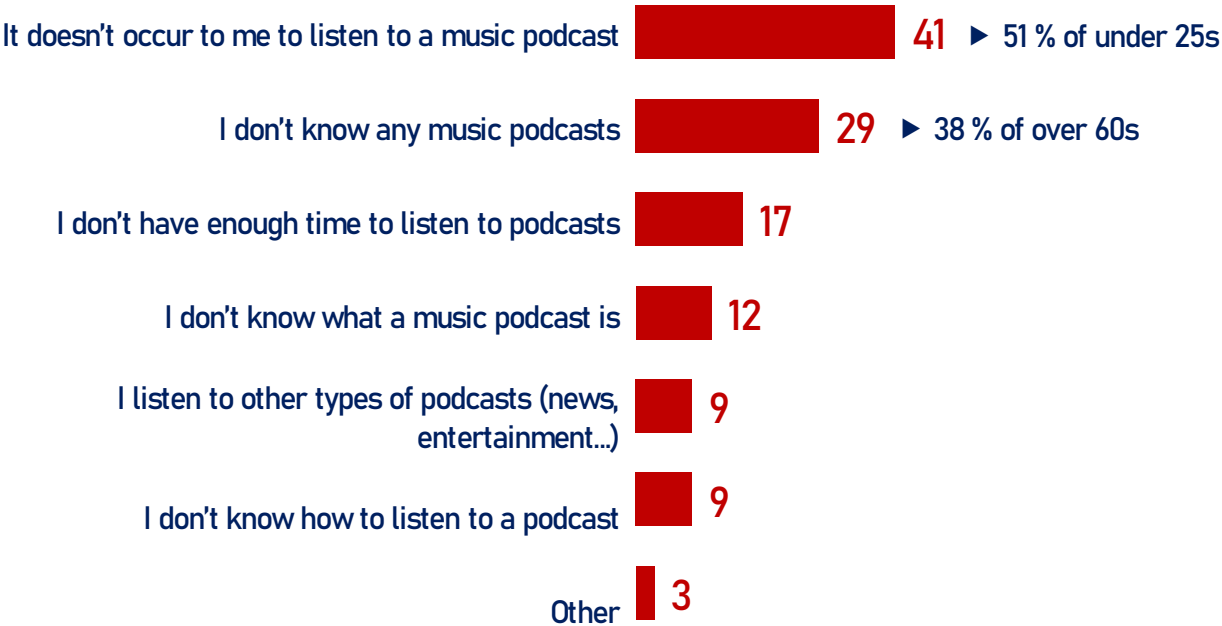


The main reason people give for listening to music podcasts is that you can listen to them whenever you like; people who don't listen to them say it doesn't occur to them to do so or they don't know of any music podcasts

Question: "What are the main reasons why you listen to music podcasts?"
(Source: Those who listened to music podcasts at least once a month over the past 12 months, i.e. 20% of the sample)
Total greater than 100 as four answers possible

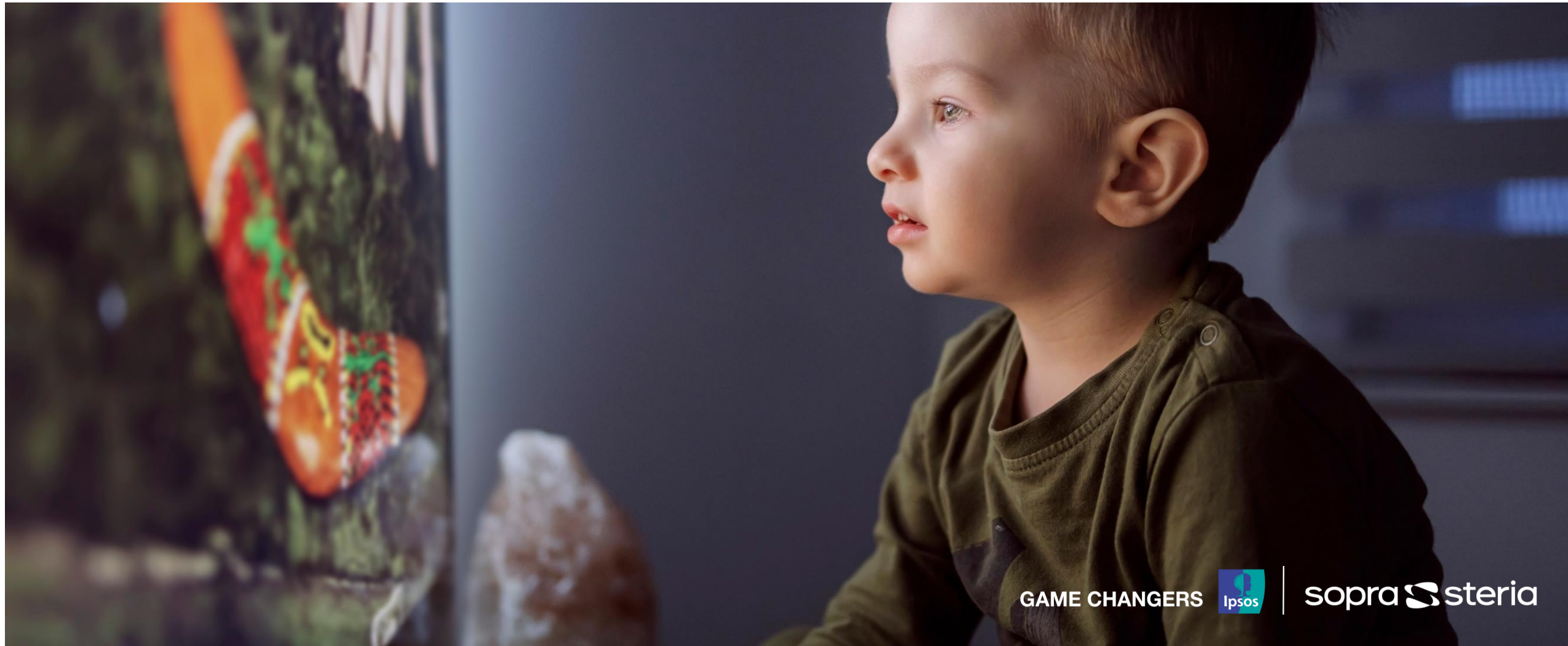


Question: "What are the main reasons why you don't or hardly listen to music podcasts?"
(Source: Those who listen to music but have listened to music podcasts less than once a month or not at all in the past 12 months, i.e. 74% of the sample)
Total greater than 100 as two answers possible



PART 7

FOCUS: TELEVISION



GAME CHANGERS



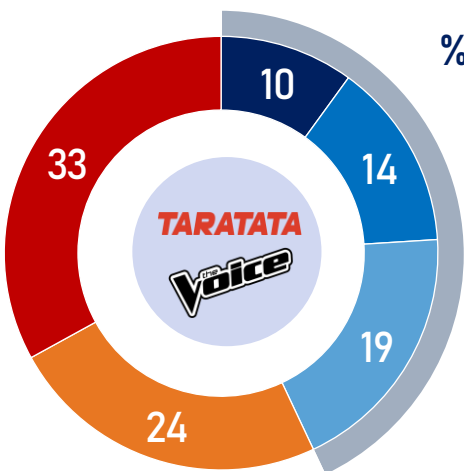
sopra  steria



More than 3 out of 5 French people who listen to music do so on the television at least once a month, most often via music shows or music videos

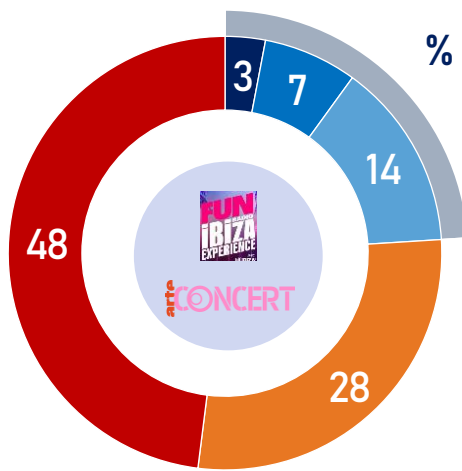
Question: "Over the past 12 months, have you listened to music on the following formats?"
(Source: Those who listen to music, i.e. 94% of the sample)

Music shows
(e.g. Taratata, The Voice,
N'oubliez pas les paroles)



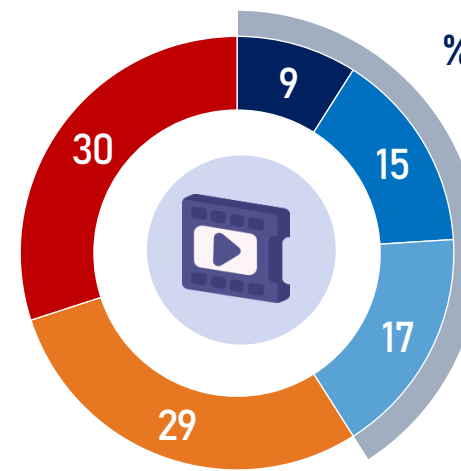
% AT LEAST ONCE A MONTH
43

Concerts recordings or broadcasts
(e.g. Fun Radio Ibiza Experience, concerts broadcast on Culturebox and ARTE)



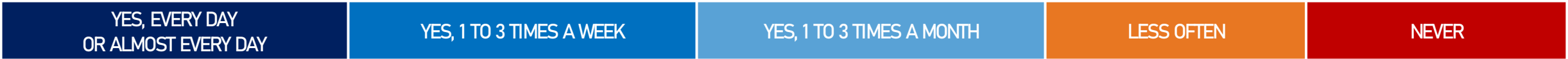
% AT LEAST ONCE A MONTH
24

Music videos on TV



% AT LEAST ONCE A MONTH
41

62 % listen to music at least once a month on the television



People who listen to music on the television have relatively few pronounced characteristics socio-demographically and in terms of music engagement



Of those who listen to music on the television at least once a month
(i.e. 62 % of people who listen to music)...

Over-represented profiles in terms of music engagement



Music occupies a very important place for **38 %** of them
(vs 31 % of all French people)



On average listen to **2 hrs 33 mins** of music every day
(vs 2 hrs 11 mins for all French people)



On average listen on **8 different formats** every month
(vs 6 for all those who listen to music)



55 % have been to at least one concert over the past 12 months
(vs 47 % of all those who listen to music)



39 % have been to at least one festival over the past 12 months
(vs 30 % of all those who listen to music)



37 % have children *(vs 32 % of French people)*



No other socio-demographic profiles are over-represented, be it in terms of gender, age, level of education or place of residence.

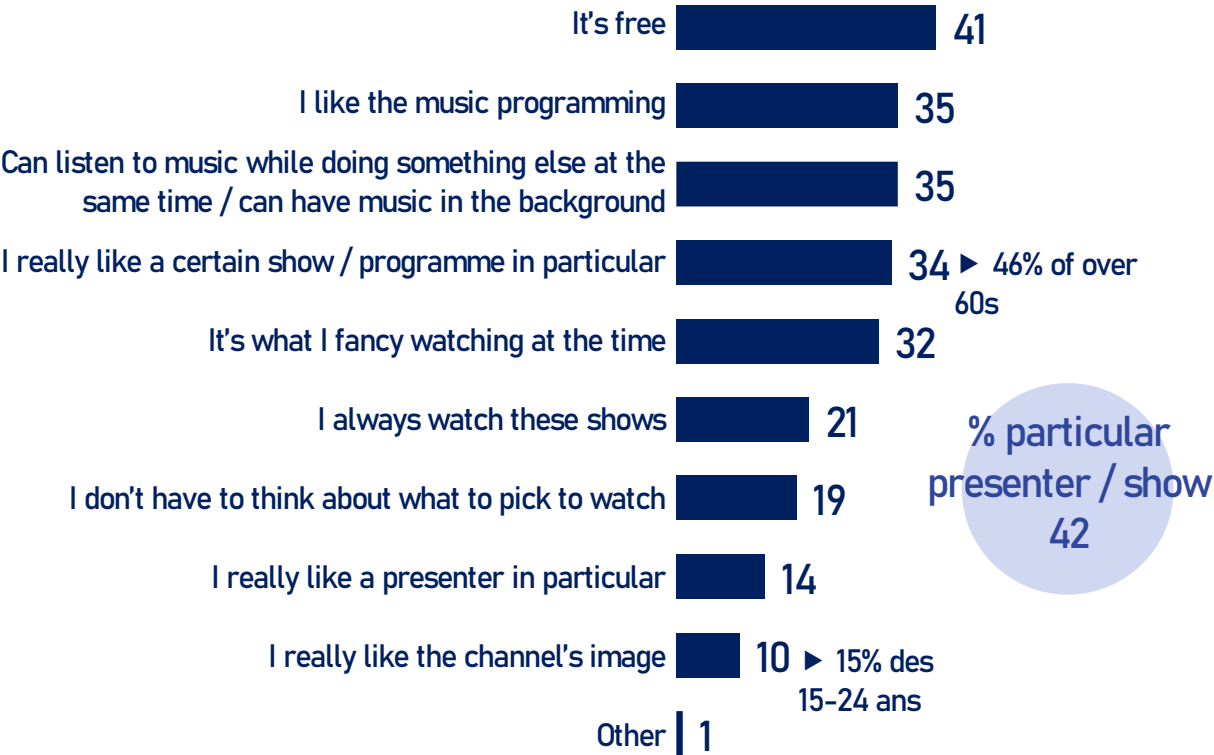


The main reasons for watching music shows, videos and concerts on television are that they are free, people enjoy the shows on offer and you can easily listen to them in the background

Question: "What are the main reasons why you watch music shows, concerts or videos on television?"

(Source: Those who listened to music on television at least once a month over the past 12 months, i.e. 58% of the sample)

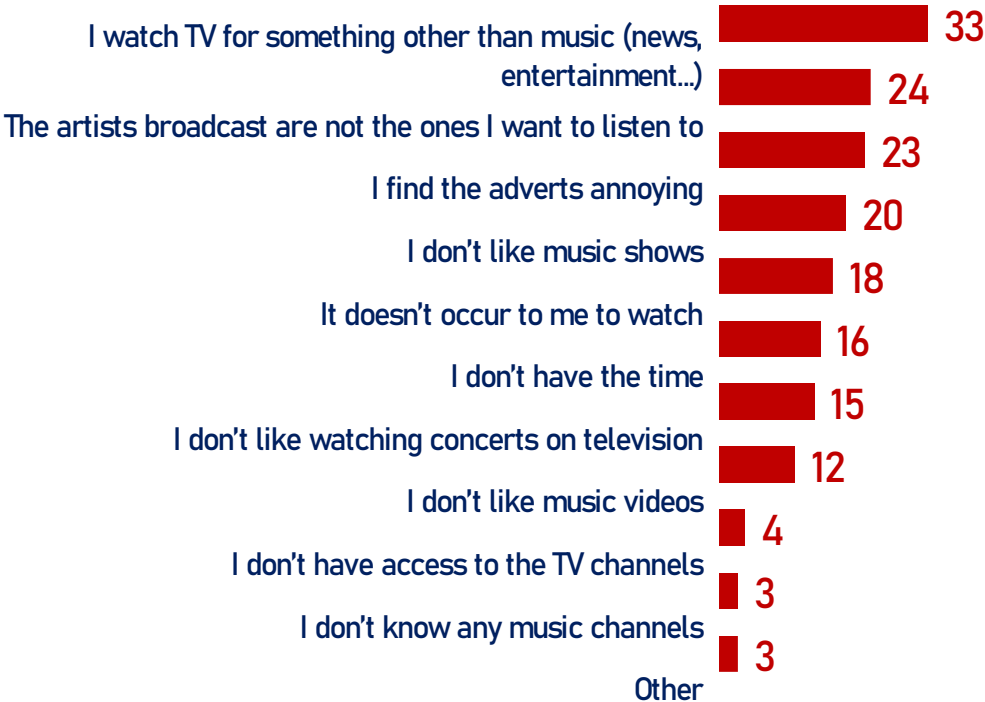
Total greater than 100 as four answers possible



Question: "What are the main reasons why you don't watch or watch very few music shows, concerts and clips on television?"

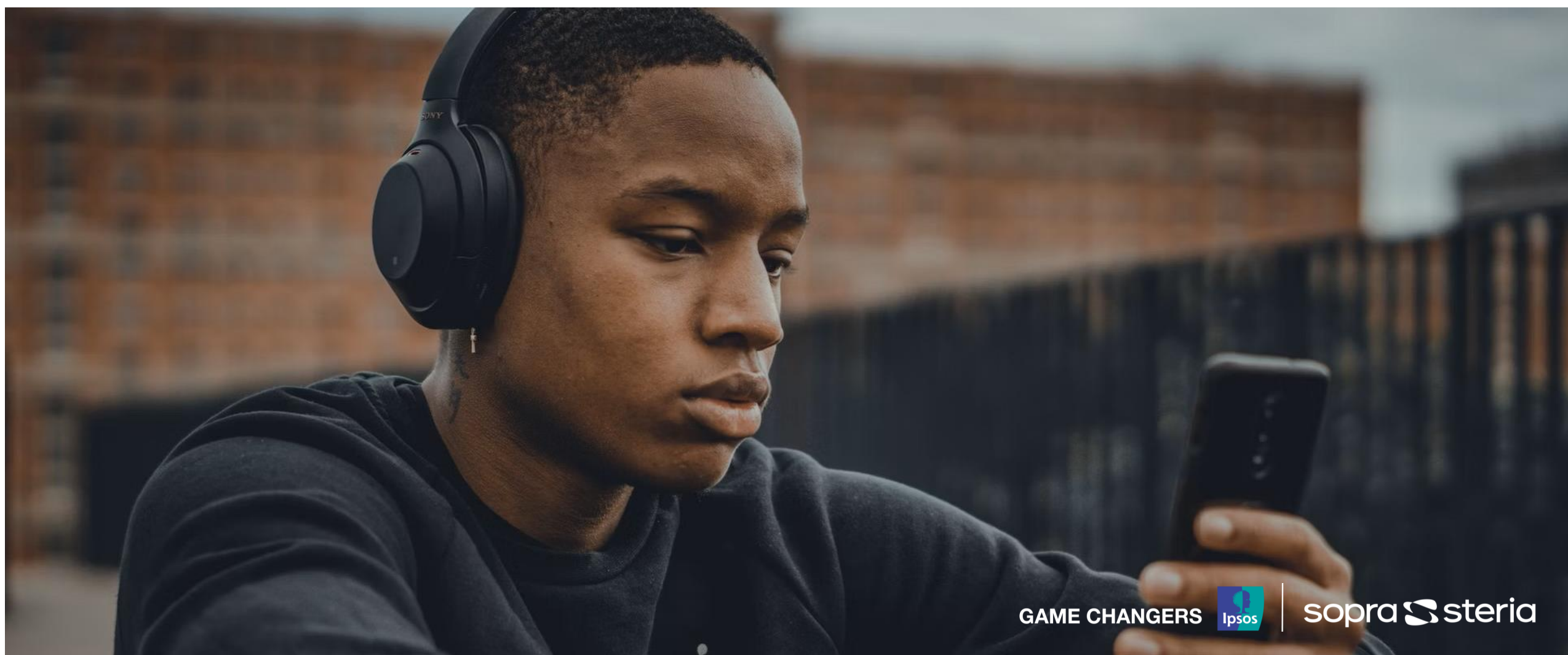
(Source: Those who listen to music but have listened to music on television less than once a month or not at all in the last 12 months, i.e. 36% of the sample)

- Total greater than 100 as three answers possible



PART 8

FOCUS: SOCIAL MEDIA AND VIDEO GAMES



GAME CHANGERS

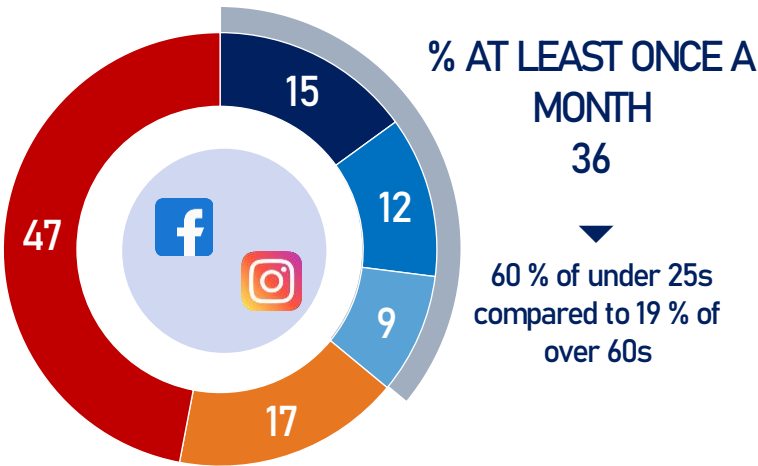


sopra  steria

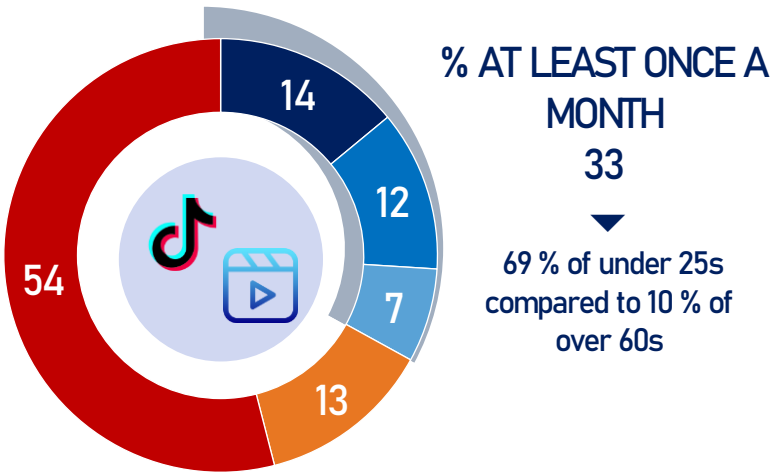
Almost half of French people who listen to music do so at least once a month on social media and/or short-form videos, and almost a quarter on video games

Question: "Over the past 12 months, have you listened to music on the following formats?"
(Source: Those who listen to music, i.e. 94% of the sample)

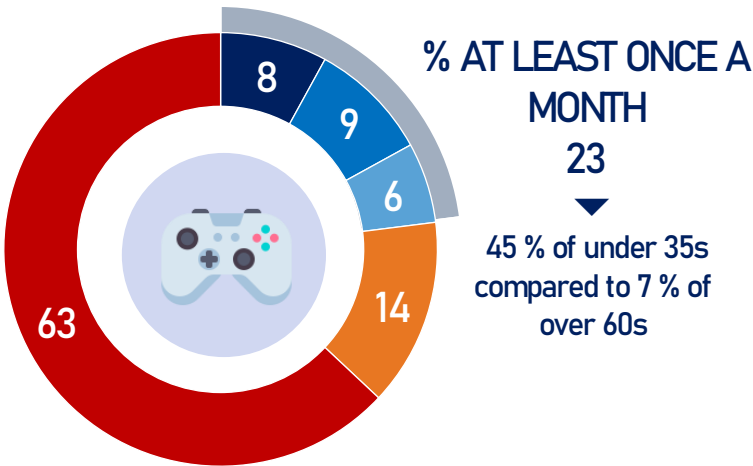
Social media
(Facebook, Instagram, Snapchat, Twitter*)



Short-form video apps
(e.g. TikTok, Reels Instagram)



Video games



48 % listen to music at least once a month on at least one of these formats
43% listen specifically on social media and/or short-form video apps

YES, EVERY DAY OR ALMOST EVERY DAY	YES, 1 TO 3 TIMES A WEEK	YES, 1 TO 3 TIMES A MONTH	LESS OFTEN	NEVER
------------------------------------	--------------------------	---------------------------	------------	-------

*Survey carried out before Twitter became X

People who listen to music on short-form video apps and social media tend to be younger, using headphones and earbuds more than the average music listener

 Of those who listen to music on short-form video apps and/or on social media at least once a month (i.e. 43 % of those who listen to music)...


Over-represented profiles in terms of music engagement

-  Music occupies a very important place for **46 %** of them
(vs 31 % of all French people)
-  On average listen to **2 hrs 43 mins** of music every day
(vs 2 hrs 11 mins for all French people)
-  On average listen on **9 different formats** every month
(vs 6 for all those who listen to music)
-  **62 %** have been to at least one concert in the past 12 months
(vs 47 % of those who listen to music)
-  **46 %** have been to at least one festival in the past 12 months
(vs 30% of those who listen to music)

Over-represented socio-demographic profiles

 **26 %** are under 35 (vs 14 %)

The differences concerning the most listened to music genres and listening methods:

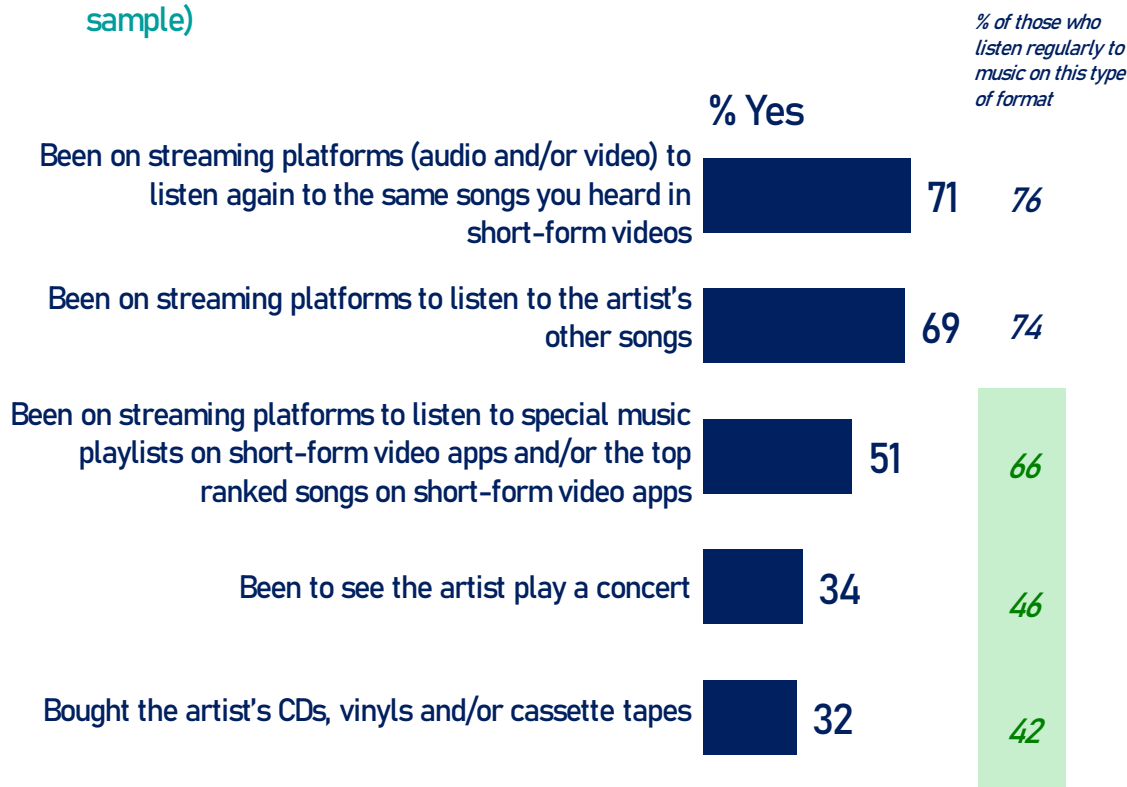
-  **65 %** listen to music with headphones / earbuds
(vs 49 % of those who listen to recorded music)
- 38 %** rank R&B / soul in their top 5 most listened to recorded music genres
(vs 31% of those who listen to recorded music)
- 35 %** rank rap/ in their top 5 most listened to recorded music genres
(vs 25 % of those who listen to recorded music)

A large majority of people who listen to music on short-form video apps and social media have already gone on streaming platforms to listen to the same songs again, as well as other songs by the same artists



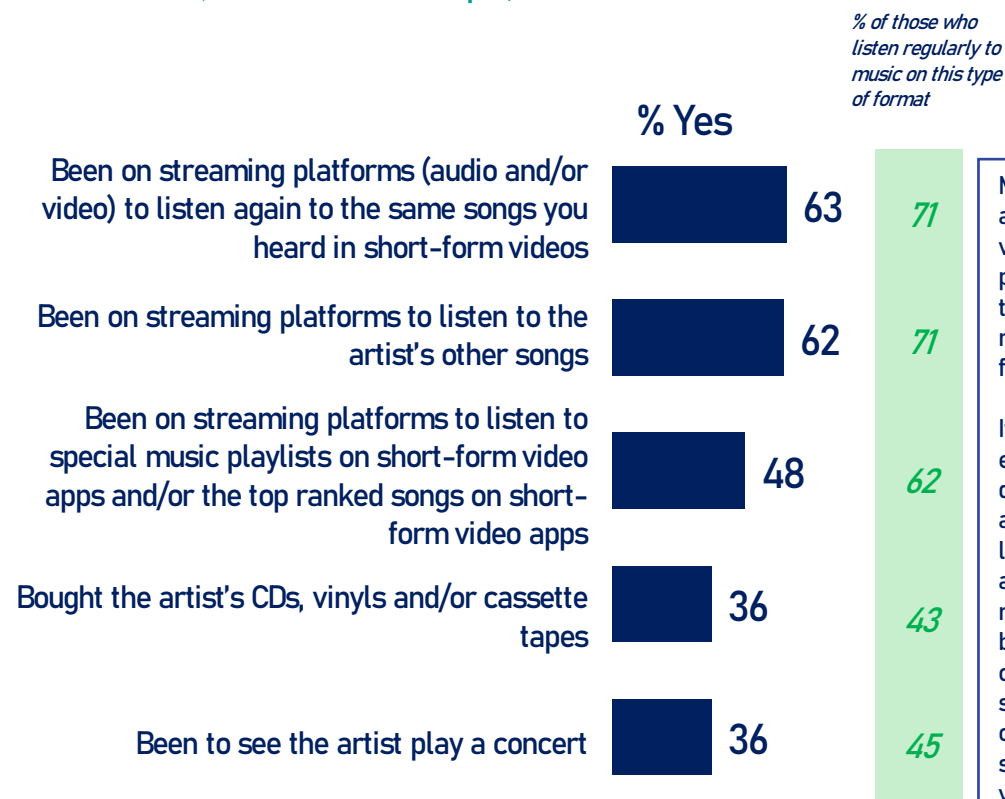
Question: "After discovering music on short-form videos (e.g. TikTok, Instagram Reels), have you ever:"

(Source: Those who listened to music via short-form videos on social media at least once a month over the past 12 months, i.e. 30% of the sample)



Question: "After discovering music via social media (e.g. Facebook, Instagram, Snapchat, Twitter) have you ever:"

(Source: Those who listened to music via social media at least once a month over the last 12 months, i.e. 33% of the sample)



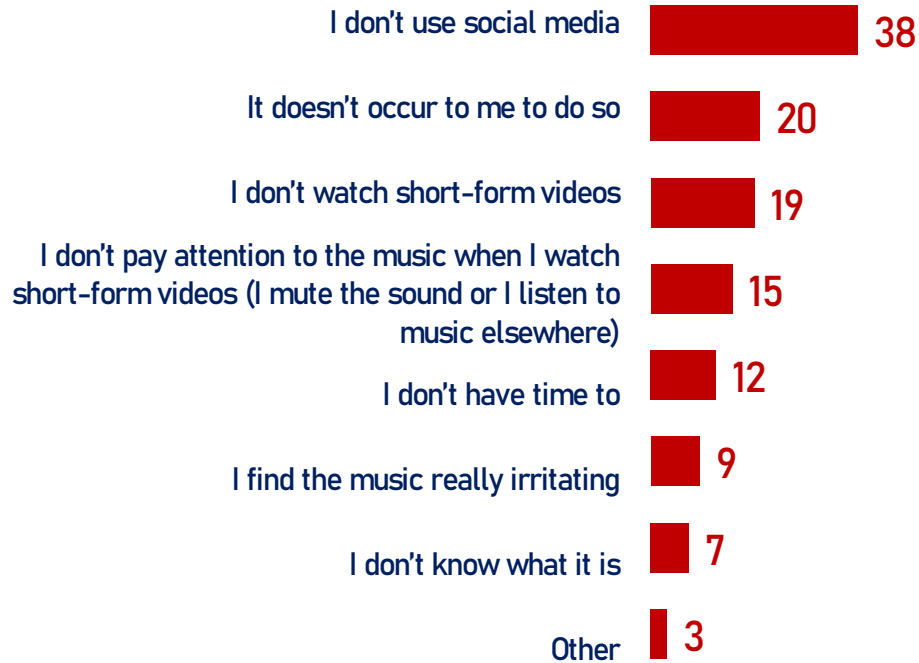
Music engagement regarding artists discovered on short-form videos and social media is particularly strong amongst those who listen to music the most often on this type of format.

It is important to note that music engagement functions differently for short-form videos and social media. People who listen to music on social media are less likely to listen again to music discovered on this format, but when they do, they buy more of the artist's products and go see the artists in concert more often than those who discover songs through short-form videos.

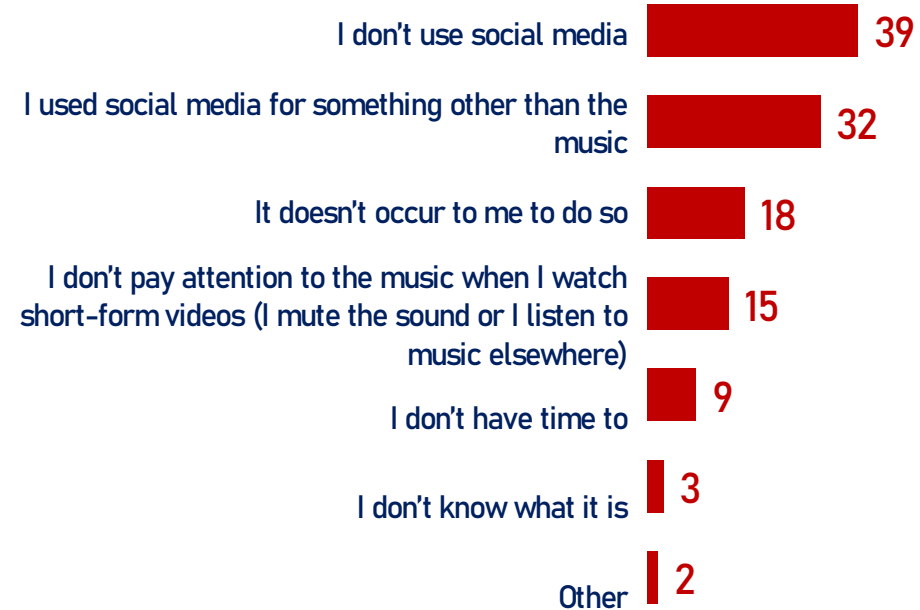


While the main reason why people don't listen to music via short-form videos and social media is because they don't use these types of platforms, a significant number of their users only focus on non-musical content or don't pay attention to the music

Question: "What are the main reasons why you don't or hardly listen to music via short-form videos on social media (e.g. TikTok, Instagram Reels)?"
(Source: Those who listen to music but have listened to music less than once a month or not at all to short-form videos on social media over the past 12 months, i.e. 64% of the sample) – Total greater than 100 as three answers possible



Question: "What are the main reasons why you don't listen to music via social media?"
(Source: Those who listen to music but have listened to music less than once a month or not at all via social media over the past 12 months, i.e. 61% of the sample)
– Total greater than 100 as two answers possible



People who listen to music on video games tend to be male and young, and more music loving than the average



Among those who listen to music on video games at least once a month
(i.e. 23 % of those who listen to music)...

Over-represented profiles in terms of music engagement



41 % currently play an instrument
(vs 16 % of all French people)



On average listen to **3 hrs 5 mins** of music every day
(vs 2 hrs 11 mins for all French people)



On average listen on **10 different formats** a month
(vs 6 for all those who listen to music)



69 % have been to at least one concert in the past 12 months
(vs 47 % of those who listen to music)



56 % have been to at least one festival in the past 12 months
(vs 30 % of those who listen to music)

Over-represented socio-demographic profiles



63 % are male *(vs 48 % of all French people)*



59 % are under 35 *(vs 29 %)* of which **34 %** are under 25
(vs 14 %)



25 % live in the Paris region *(vs 19 %)*

The differences concerning listening methods:



74 % listen to music via headphones / earbuds
(vs 49 % of those who listen to recorded music)



73 % regularly listen to music after 6pm
(vs 49 % of those who listen to recorded music)

Breakdown of music listening habits of those who listen to music on video games: whatever the listening practice, they do it more often than the average French person



+ Compared to all French people who listen to music on all formats combined, at least once a month those who listen to music via video games (i.e. 23 % of those who listen to music)...



... are **3.1** times more likely to listen to music on collaborative audio streaming platforms



... are **2.8** times more likely to listen to cassette tapes



... are **2.4** times more likely to listen to music podcasts



... are **2.3** times more likely to listen to music on internet radio



... are **2.2** times more likely to listen to music on short-form video apps



...are **2.5** times more likely to go to major festivals

...are **2.2** times more likely to go to small- or medium-sized festivals

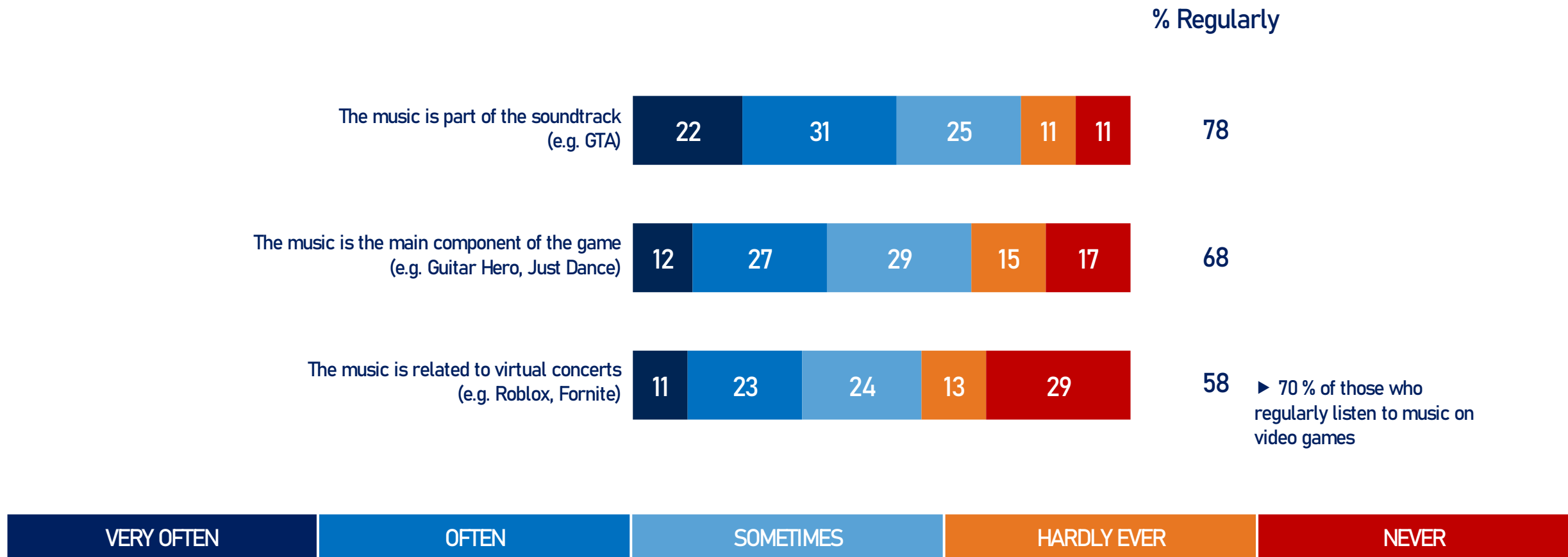


...are **2.2** times more likely to go to concerts in theatres, cultural centres, youth clubs or community centres



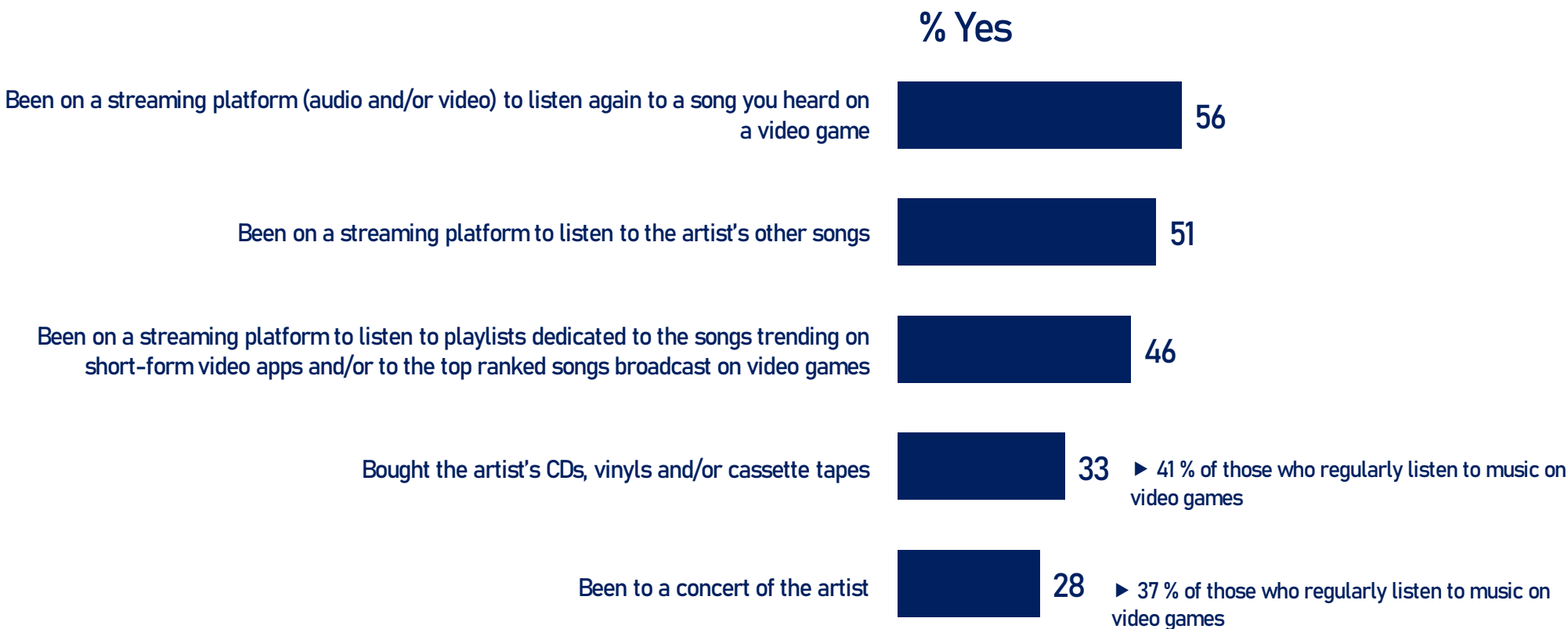
The music listened to on video games is most often the soundtrack, but a majority of listeners also state that the music they listen to while playing is regularly the main component of the game or comes from virtual concerts

Question: "Tell us about the music you listen to on video games:"
(Source: Those who listened to music on video games at least once a month over the past 12 months, i.e. 21% of the sample)



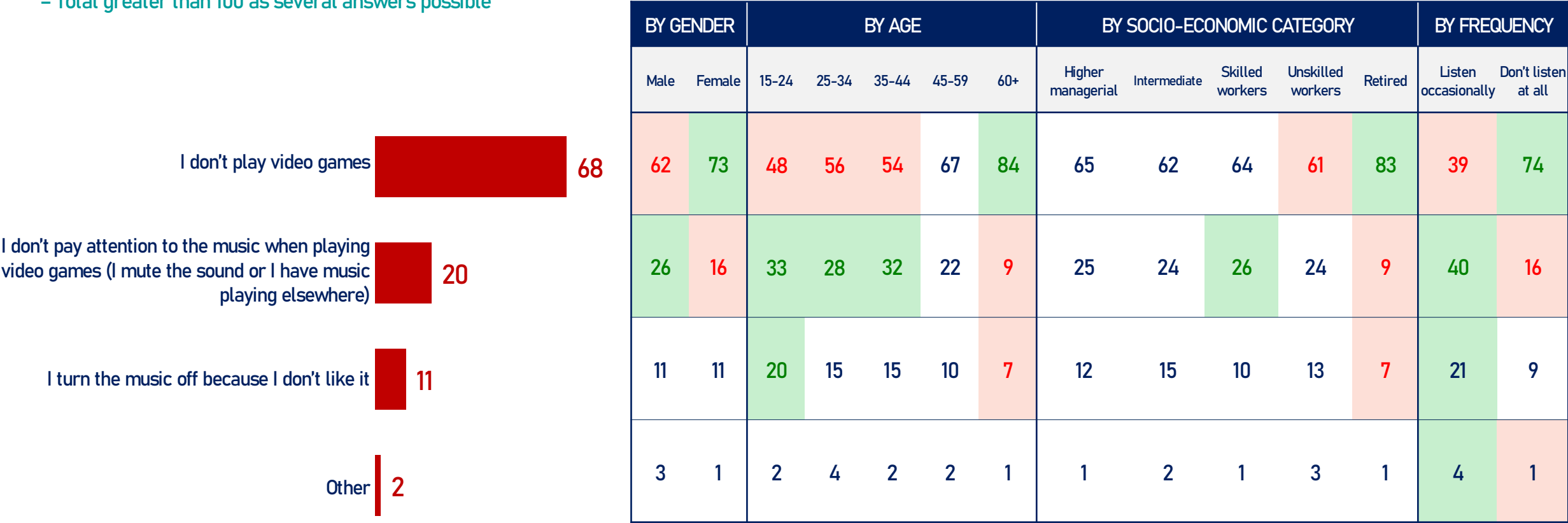
Video games play a part in musical discovery in their own right: the majority of people who listen to music on video games have already listened to songs discovered whilst playing, and a little more than a quarter have already gone to a concert of an artist discovered in this way

Question: “After discovering music on a video game, have you ever:”
(Source: Those who listened to music on video games at least once a month over the past 12 months, i.e. 21% of the sample)



More than two thirds of French people who listen to music but don't or hardly do so via video games say it's because they don't play video games, while others say they don't pay attention to the music when playing a video game

Question: "What are the main reasons why you don't listen to music on video games?"
 (Source: Those who listen to music but have listened to music less than once a month or not at all on video games over the past 12 months, i.e. 73% of the sample)
 – Total greater than 100 as several answers possible

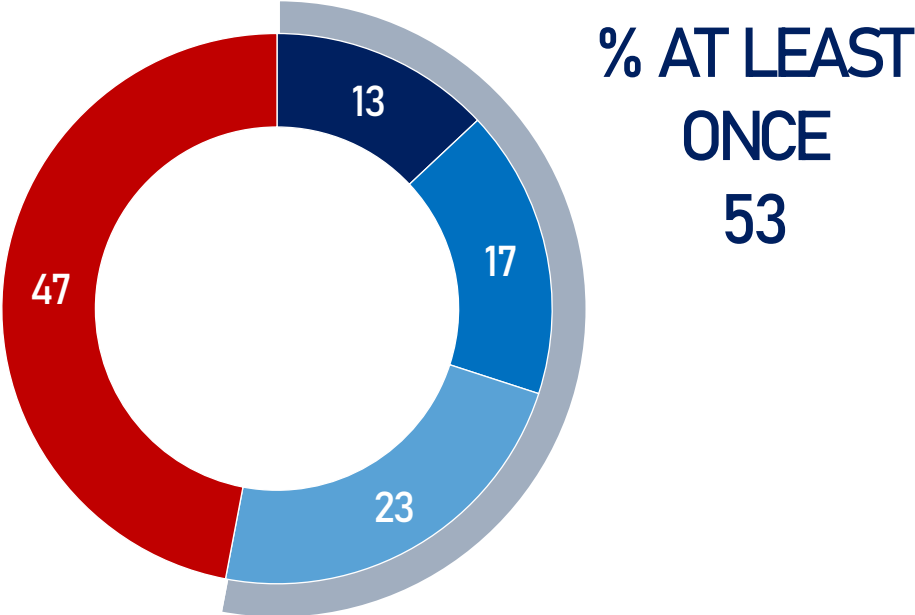




More than one in two people who listen to music on social media, short-form videos and/or video games say they have already seen live concerts on these formats

Question: “Over the past 12 months, have you watched/listened to a live concert on short-form videos, social media and/or video games?”

(Source: Those who listened to music on short-form videos, social media or video games at least once a month over the past 12 months, i.e. 44% of the sample)



GENDER					% YES
Male					55
Female					52
AGE					
15-24					63
25-34					55
35-44					51
45-59					45
60+					47
SOCIO-ECONOMIC CATEGORY					
Higher managerial					66
Intermediate					51
Skilled workers					51
Unskilled workers					50
Retired					46
BY PLATFORM TYPE					
Social media					60
Short-form video apps					59
Video games					64
BY LISTENING FREQUENTLY					
Very regularly					70
Fairly regularly					53
Moderate					36



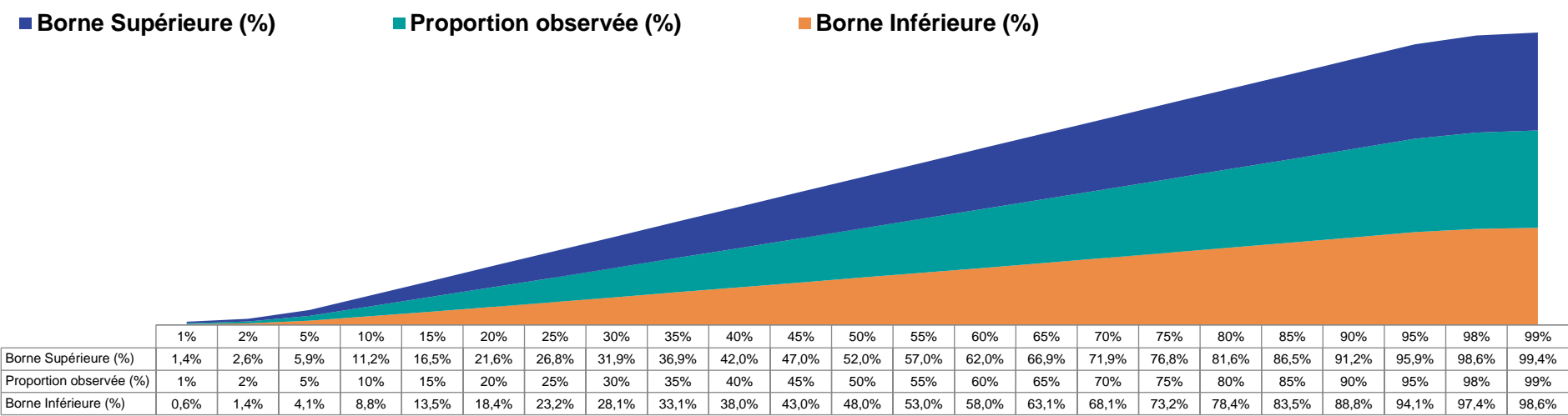
APPENDICES

RELIABILITY OF RESULTS

With regard to this study:

- Confidence interval: 99%
- Sample size: 4 000

The observed proportions are between:



OUR COMMITMENTS



Professional codes, quality certification and data protection

Ipsos is a member of the following French and European professional market research organisations:

- **SYNTEC** (www.syntec-etudes.com), the French Union of Market Research companies
- **ESOMAR** (www.esomar.org), European Society for Opinion and Market Research

Ipsos France is committed to applying the **ICC/ESOMAR international Code** for opinion and market research. This code defines essential standards of ethical and professional conduct for market research professionals and sets out the protection offered to research participants.

Ipsos France complies with the applicable laws. Ipsos has appointed a Data Protection Officer and has implemented a compliance plan for the General Data Protection Regulation (EU Regulation 2016/679). For more information on our privacy policy: <https://www.ipsos.com/fr-fr/confidentialite-et-protection-des-donnees-personnelles>

The retention period for all personal data collected from people interviewed is as follows, unless otherwise agreed with the client:



- 12 months from the date of completion of an Ad Hoc survey, or one-off single surveys
- 3 years following the end of each wave of a continuous on-going survey.

Ipsos France has obtained the **ISO 20252: Market Research standard from AFNOR Certification**



- This document was drafted in accordance with these international codes and quality standards. The technical elements relative to the execution of the survey are described in the methodology or in the survey overview enclosed in the report.
- This survey was carried out in accordance with the international codes and quality standards.

RELIABILITY OF RESULTS: SELF-COMPLETION ONLINE SURVEYS

To ensure the overall reliability of a survey, all forms of survey error must be taken into account. This is why Ipsos imposes strict controls and procedures throughout the whole survey process.

UPSTREAM OF DATA COLLECTION

- **Sample:** structure and representativeness
- **Questionnaire:** the questionnaire is drafted according to a drafting standard comprised of 12 mandatory standards. It is reviewed and approved at a senior level and then sent to the client for final validation. The programme (or questionnaire script) is tested by at least 2 people before being validated.

DURING DATA COLLECTION

- **Sampling:** Ipsos imposes very strict operating rules for its sampling frame in order to maximise the random nature of the sample selection: random selection from telephone directory, response rate, participation rate, abandonment rate, off-target etc.

- **Fieldwork monitoring:** data collected is monitored and controlled (dedicated link or IP address control, penetration, interview duration, response consistency, checking for participant response bias, participation rate, reminder rate...).

DOWNSTREAM OF DATA COLLECTION

- The results are analysed using statistical analysis methods (confidence interval vs. sample size, tests of significance). Initial results are systematically checked against the raw data collected, followed by data consistency verification (particularly the results observed compared to the comparison sources in our possession).
- When sample weighting is used (margin calibration method), the Data Processing (DP) team first checks the data before it is validated by the Research team.

ABOUT IPSOS

Ipsos is the third largest market research company in the world. We're present in 90 markets and employ more than 18,000 people, giving us the power to conduct research programmes in more than 100 different countries.

Our research professionals, analysts and scientists have built unique multi-specialist expertise that provides powerful insights into the actions, opinions and motivations of citizens, patients, customers and employees. We offer 75 business solutions based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques.

Our company tagline "Game Changers" sums up our global ambition to help our 5,000 clients navigate with confidence our rapidly-changing world.

Founded in France in 1975, Ipsos has been listed on Euronext Paris since 1st July 1999. The company is part of the SBF 120 and Mix-60 indices and is eligible for the Differed Settlement Service (SRD).

ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP
www.ipsos.com

GAME CHANGERS

In a world of rapid change, the need for reliable information to make confident decisions has never been greater.

At Ipsos, we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide true understanding of society, markets and people.

To do this, we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can make faster, smarter and bolder decisions. Ultimately, success comes down to a simple truth:
You act better when you are sure.