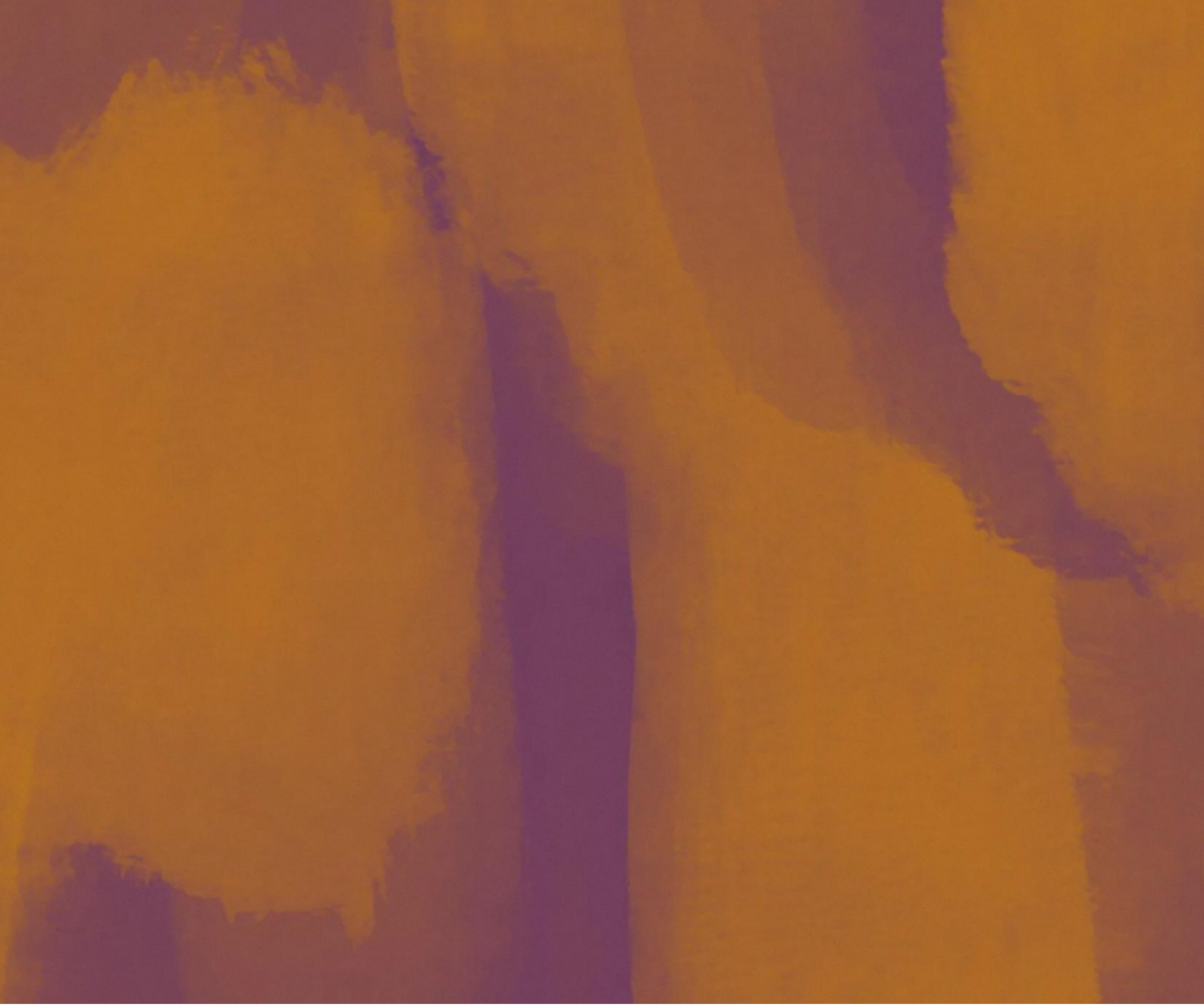

Music Usage in France

Focus on music streaming usage

Overall summary of the IPSOS study for the CNM – November 2026

Centre national de la musique

Streaming has established itself as the main driver of music distribution and of the sector's momentum. Following on from the barometer conducted in 2023, and as part of its observation mission, the Centre national de la musique (CNM, France's national music center) commissioned a quantitative and qualitative study to deepen the understanding of music streaming usage in France and to shed light on the barriers and drivers at play in paid subscription.

01

Methodology

This study, carried out by IPSOS for the Centre national de la musique, is based on a quantitative survey of 3,000 people aged 15 and over living in metropolitan France, forming a representative sample of the French population. The sample was surveyed online (CAWI) through the IPSOS online Access Panel. Some of the results could be compared with a previous edition conducted in 2023 by the same research provider[1].

The survey explores respondents' relationship with music and their listening habits, then focuses on the use of music streaming platforms and on the barriers to and drivers of subscribing to them.

In support of the quantitative survey, a two-part qualitative study was conducted to explore the study's main lines of inquiry in greater depth and, in particular, some of the findings of the quantitative survey. This qualitative work was carried out in mainland France and in four French overseas territories (Guadeloupe, Martinique, French Guiana and Réunion).

In mainland France, audio streaming music listeners (both subscribers and non-subscribers to platforms) as well as non-users completed an online diary. This was followed by 22 one-hour video interviews. The selected profiles included teenagers (15–17), young adults (18–24) and adults aged 35 to 59, with varying frequencies of use and listening intensities, using a range of music streaming platforms. In addition to these interviews, five focus groups of eight participants each, lasting two and a half hours, brought together people from the Paris region (Île-de-France) and other regions, from different age groups (18–29, 30–49, 50 and over), with a mix of genders, family situations and geographic locations.

In the overseas territories, 24 one-hour interviews were conducted, by video or face to face, across the different territories with audio streaming music listeners (subscribers and non-subscribers) and non-listeners. The profiles interviewed covered a mix of age groups (18–34 or 35 and over), genders, socio-professional categories and family situations. A focus group held in Île-de-France brought together listeners aged 20 to 50 who had lived in the overseas territories within the past five to seven years and now live in mainland France, and were therefore able to compare the two situations.

[1] IPSOS for the CNM – Music Usage Barometer in France, 2023.

02

Music at the heart of French people's daily lives

Music plays an important role in the lives of a large majority of French people (81%), a share that has risen since 2023 (+5 pts). Music holds a particularly large place among under-25s and people aged 35 to 44, as well as among executives. Discovering music is also important to a large majority of French people (80%), and even more so to under-35s and executives. This trend weakens among the over-70s.

This prominent place is reflected in practice: **almost all French people listen to music every day (96% for at least one minute a day) and 43% listen for one hour or more a day**, a sign of intensive use. **This share is markedly higher among young people under 25**. Conversely, retirees are more likely to listen to little music (under 30 minutes a day) or none at all. Notably, the bigger the place music held in childhood, the greater the propensity to listen to music for one hour or more a day.

In everyday life, music gives structure to the day. It sets the pace of transitional moments (getting ready in the morning, on the move, unwinding at the end of the day) and accompanies certain activities (work, sport, household chores). Accordingly, **a very large majority of music listeners say they regularly listen at home while doing something else (cleaning, cooking, reading… excluding work) (89%) or while on the move (81%).** 73% of students regularly listen while studying, while 63% of employed people do so when working from home and 45% at their workplace. More than half of French people (55%) listen to music while exercising and nearly three quarters (72%) during evenings with friends – moments of active listening in which music helps people connect. At the same time, 81% say they regularly listen to music at home while doing nothing else. Some interviewees describe these as special moments, especially in the evening and on weekends, sometimes using physical formats such as vinyl, when they pay closer attention to the lyrics and the production.

Whether to shut oneself off while traveling, to regulate or amplify certain emotions, to break the silence or to create a presence or a mood, listening to music is an individual, often passive practice tied to a particular function.

The qualitative study highlights a relationship with music grounded in identity and passion that tends to fade with age. A strong marker of identity among young people (15–30), music takes more of a back seat and serves a more utilitarian function in the lives of respondents over 35.

Personal attachment to music also varies across listener profiles. Streaming platform subscribers have an "ownership" relationship with music: it appears as an essential part of their

private lives, and they are particularly attached to their personal playlist, built up over the years and seen as the gateway to and center of all their listening. Non-users of audio streaming, for their part, have a more impersonal and utilitarian relationship with music: they use it mainly as background sound or to create a mood, they do not need to build their own playlists, and automatically generated ones suit them fine.

Overseas territories



This analysis applies to people in mainland France and is also found among overseas respondents. But for residents of the overseas departments, music has a particularly strong social dimension. Collective listening is very present in both private and public spaces, and seems to play a major role in building a collective identity. **For those from the overseas departments now living in mainland France, music helps them maintain a bond with their home territory and make up for the perceived lack of a convivial, collective music culture.**

Overseas residents also see music as an everyday companion, a source of comfort and a means of escape. Even more than for people in mainland France, it is a driving force in building one's identity and asserting oneself.

03

Music listening habits in France: the growing place of live music and ever more digital listening to recorded music

Live music attendance on the rise, at both concerts and festivals

Five years after the disruption caused by the COVID crisis, French people are continuing to return to venues and festivals. On average, more than half of them (53%, +6 pts vs. 2023) attended a concert in the past year and more than a third a festival (36%, +6 pts vs. 2023). This upward trend holds for the different types of venues (concerts in bars/clubs, in large venues, or in small or mid-size venues – except for concerts in theaters, cultural centers and youth and community centers (MJCs)) and for the different types of festivals (micro, small or medium-sized, and large festivals).

Under-25s are overrepresented: **two thirds of under-25s say they attended a concert and nearly half (49%) a festival in the past year.** Executives are also overrepresented, as are residents of large urban areas (100,000 inhabitants or more) when it comes to attending concerts – a finding consistent with the higher density of venues and events in more densely populated areas. Conversely, people aged 70 and over are significantly less likely than average to have attended concerts or festivals. Rural residents are also slightly more likely than the national average not to have attended a live event in the past 12 months.

French Variété/Chanson (46% of live audiences), Pop (29%), Rock/Punk (28%), Rap/Hip-Hop (16%) and Classical Music, including opera and contemporary classical (12%), tied with Jazz, are the music genres most often cited as the ones most listened to live over the past 12 months. **Some profiles are more represented depending on the genre: under-35s tend to be more likely to have seen Rap/Hip-Hop live, 35–59-year-olds Funk/Disco, R&B/Soul or Rock/Punk, while the over-60s are overrepresented among live audiences for French Variété/Chanson, Classical Music, Jazz, and Traditional and World Music.** Unsurprisingly, the genres particularly popular with older people see younger people underrepresented, and vice versa.

Geographically, live listening to Rap/Hip-Hop, Afrobeat and Bouyon/Shatta is also more pronounced among residents of Île-de-France.

Overseas territories



The qualitative part of the survey shows that live music plays a central role for overseas residents. Although access to paid live music remains more difficult (a more limited offering, high prices relative to local purchasing power), music is very present at commemorative celebrations and gives rise to convivial moments. Local music is also of great importance to their cultural identity.

Live music remains a source of discovery of new music: artists booked as opening acts at concerts are cited by 15% of respondents (2% cite them as their primary source of discovery), compared with 10% for artists booked at festivals (1% cite them as their primary source). This is also more true of heavy music listeners (two hours or more a day) and of those for whom music plays a very important role in their lives.

Listening to recorded music: a resolutely digital practice

This trend is first visible in the listening devices used: **81% of French people who listen to music do so on a computer, smartphone or tablet** (+6 pts vs. 2023), compared with 68% on a radio set, car radio or television (-3 pts vs. 2023).

People under 45 are overrepresented relative to the average in listening via smartphones, as well as game consoles. Conversely, they are underrepresented in listening in the car (car radio/sound system), on radio sets and on CD players. Symmetrically, the over-60s are significantly heavier users of car radios – as are residents of rural areas – radio sets, CD players and turntables.

51% of French people say they listen to music with earbuds or headphones, compared with 58% with speakers or a sound system. Voice-controlled smart speakers are mentioned by only 14% of respondents. Meanwhile, nearly a quarter (22%) say they listen to music without any dedicated equipment, directly through the built-in speaker of their smartphone, computer, TV or radio, for example.

Among listening media (used at least once a month to listen to music), music radio stations (NRJ, Radio Nova…) remain the benchmark (65% of respondents listen to a music radio station at least once a month, -3 pts vs. 2023). 30% of French people listen to music radio every day and 19% never do. Residents of Île-de-France and economically inactive people are more likely than average to have abandoned it. Conversely, 35–59-year-olds and rural residents listen to it more. General-interest radio stations (France Inter, RTL…) are listened to for music by 53% of the population, with a strong representation of the over-60s. 29% of respondents, particularly under-35s, never listen to this medium.

Taken together, music and general-interest radio, web radio and podcasts are cited as listening media by 81% of respondents. This figure is down (-4 pts vs. 2023) but still ahead of streaming platforms as a whole (audio, video, community-based) at 77%, a share that is rising (+4 pts).

However, in detail, video streaming platforms (YouTube, Dailymotion, Twitch…) are used at least once a month by 62% of respondents, putting them close behind music radio at the top of the ranking. Audio streaming platforms (Deezer, Spotify, Qobuz…), at 54%, gain 6 points and overtake general-interest radio for third place. Community-based streaming platforms (SoundCloud, Bandcamp…) hold steady at 13%.

Audio streaming platforms have 28% daily listeners and video streaming platforms 20%. In both cases, these are mainly respondents under 35, from higher socio-professional groups (CSP+) and urban. Notably, video platforms also attract more people from the least affluent socio-professional categories.

After radio as a whole and streaming platforms as a whole come TV media (music videos, music programs, concerts), used by 62% of respondents at least once a month; social media, short videos and video games, used by 52% (+4 pts vs. 2023); physical formats (CDs, vinyl and audio cassettes), used by 42% (-3 pts); and lastly personal digital libraries, used by 41% (-3 pts). 23% of the population listen to music every day via social media, short videos and video games – mostly under-35s, urban residents and economically inactive people.

The most listened-to music genres in recorded music are French Variété/Chanson (cited by 57%), Pop (45%), Rock/Punk (36%), Rap/Hip-Hop (24%), and R&B/Soul and Funk/Disco (tied at 21%). Under-25s are more numerous among listeners of Rap, Afrobeat, Asian Pop (K-Pop, J-Pop, C-Pop) and Bouyon/Shatta. Men aged 35 to 59 are overrepresented among listeners of Electronic Music, Rock/Punk and Metal/Hard Rock, while women in the same age group are more numerous among listeners of Variété, Pop and R&B/Soul. The over-60s are significantly more represented among listeners of French Variété/Chanson, Classical Music, Jazz and Blues. As with live music, Afrobeat and Bouyon/Shatta listeners are more numerous in Île-de-France.

French and English are the two most listened-to languages in songs (95% and 91%). 53% of respondents even rank French first, compared with 39% for English. Other languages include Spanish (cited by 36% of respondents), Italian (29%), instrumental music without lyrics (19%) and French regional languages (14%).

As sources of discovery, radio is mentioned by more than half of respondents (55%), and a quarter (26%) consider it their primary source of discovery. TV and audio streaming platforms come second and third (35% and 32%), with 9% and 15% of respondents respectively citing them as their primary source of discovery. They are followed by, among others, word-of-mouth recommendations and social media. Notably, 6% of respondents say they only listen to music they already know. Respondents for whom music plays a very important role in their lives are overrepresented among those who cite digital media as a source of discovery and underrepresented among those who cite radio and television.

The qualitative survey in mainland France reveals two main listener profiles: the "curious" and the "passive." The "curious," who tend to be young and heavy streaming users, value music discovery and bringing new releases into their listening rituals. The "passive," by contrast, tend to be older and are non-subscribers or non-users of streaming; they favor routine listening and attach less importance to music discovery.

Platforms play a major role in discovery for their users (subscribers or not), through suggestions of new releases, themed or editorially curated playlists, and algorithmic recommendations. Paradoxically, the playlist restrictions imposed on free tiers can be a welcome source of discovery. Social media are an essential way for under-30s to discover music: by *scrolling* through short-video apps or via artist content being promoted. Tracks are then replayed through other channels (audio or video streaming).

Radio is a major source of discovery for streaming non-users and for non-subscribers to streaming platforms' paid tiers, since it notably allows them to keep up with new releases without actively searching. Audiovisual content (e.g., films, series) is also an important source, especially for "curious" listeners. Finally, recommendations from friends and family play an important role, particularly among young people, for whom peer influence is decisive in shaping their identity. In all these cases, music recognition apps such as Shazam are widely used to capture these discoveries.

Overseas territories



In the overseas territories, local music holds an important place in listening practices, regardless of respondents' age or the media used. Local music is systematically mentioned first, across a variety of genres. R&B and Rap are often among the most popular genres, along with Zouk (from the French Caribbean), Séga (Indian Ocean) and Ragga-Dancehall. In the French Caribbean and French Guiana, Kompa (Haitian-inspired), Bouyon and Gwo ka (traditional Guadeloupean music) are also popular. French chanson is also a genre enjoyed by older people.

Streaming platforms play an important role in the overseas departments, making it easy to find local music (tracks and dedicated playlists). Older tracks or niche genres are sometimes only available on YouTube. The media used are mainly digital, with physical formats relegated to keepsakes or seen as too expensive (vinyl in particular). As in mainland France, platforms and social media play an essential role through the promotion of new releases and algorithmic recommendations. Radio also remains an important source of discovery, as do recommendations and discoveries through friends and family.

04

Music streaming: a central listening mode for subscribers, but one that has yet to prove itself to non-subscribers

More than three quarters of French people (77%) listened to music on a streaming platform (audio or video) at least once a month over the past year. More specifically, on average 45% are very regular users (at least once a week) of audio streaming platforms (excluding community-based platforms). **Young people in particular are regular users (77% of under-25s and 72% of under-35s) – while this share drops to just 20% among the over-60s.**

Among French people who stream music at least once a month (77%), YouTube, the video platform, is the most used medium (60% of respondents). Spotify comes second (41%), followed by Deezer (27%), Amazon Music (19%), YouTube Music, the music streaming service (14%), Apple Music (8%), SoundCloud (5%), Bandcamp (2%), and Qobuz, Tidal or Napster (1% each). 49% say they combine at least two platforms, and 20% three or more.

In terms of subscriptions, **38% of French people have access to at least one paid subscription to an audio streaming platform** (whether or not they pay for it themselves). By contrast, 33% have a paid subscription that they pay for themselves, at least in part. **36% of French people use only free versions of streaming platforms. Young people, urban residents and higher socio-professional groups (CSP+) are overrepresented among those with access to a paid subscription** (whether or not they pay for it themselves): notably, 61% of under-25s fall into this category.

Among respondents who say they have access to an audio streaming platform (38% of French people), 53% have at least one individual subscription, 35% at least one family plan, 7% a subscription bundled into another offer (e.g., with a mobile phone plan, Amazon Prime…) and 5% a student subscription. Residents of Île-de-France, executives, the self-employed and manual workers are more likely than the average French person to have access to at least one individual audio streaming subscription. Retirees, conversely, are underrepresented in this category.

Strong attachment to streaming platforms among subscribers

Overall, more than three quarters (76%) of subscribers say they are attached to their main audio streaming platform. And the more often they listen, the stronger this feeling. In concrete terms, more than half of streaming platform subscribers (53%) have been subscribed for over two years, and only 10% are considering changing their subscription by canceling it or switching plans – and more than half of those would stay on the same platform.

The main reasons cited for having a paid subscription to a streaming platform include: the ability to listen to music without ads (cited by 48% of subscribers), the music catalog available (40%), the ability to listen offline (31%), sound quality (29%) and the ability to create playlists alone or with others (26%). Respondents also report being overwhelmingly satisfied on all these aspects.

In the qualitative part of the survey, subscribers stressed that music plays an essential role in their lives and that they value unlimited, instant and effortless access to tracks. The switch to a subscription was most often triggered by a desire for comfort/convenience (notably no ads), for control (choosing what plays) and by being financially able to subscribe (either through an attractive offer or a change in circumstances that increased their purchasing power).

The qualitative study shows that a positive experience of paid access (trying a paid version through a friend's or family member's subscription, or a parent's plan) makes going back difficult. Subscribing generally changes listening habits: less radio listening (ad breaks seen as irritating), abandonment of physical formats (except for emotional attachment or specific listening moments) and reduced use of the YouTube video platform, which becomes limited to watching specific content (music videos, background sounds, ambient content).

When using the platform, playlists are central. All the paying users interviewed create playlists, and most stick to a single playlist that serves as their personal library – a collection of their favorite tracks, usually tied to their liked songs and favorites. For some, these playlists have been fed for several years and can be seen as their musical heritage/identity. Most do not sort the tracks they add over time, and few take the trouble to create specific playlists with a particular name or theme. Listening to editorially curated playlists is nevertheless widespread, notably to vary the tracks listened to and discover new ones. The survey highlights that listening to full albums is becoming rarer among subscribers. Since the relationship with self-made playlists is highly individual and intimate, the relationship with albums – and by extension with artists – may thus be changing, with less interest in their body of work as a whole and a more targeted choice of favorite tracks.

Overseas territories



This analysis is also borne out among overseas residents. Subscribers are won over by the seamless experience, free of ads and restrictions, which gives them control over tracks and continuous listening on the go. On the other hand, **listening on platforms does not reduce their use of other media, notably YouTube, which is essential for specific content and a visual experience; radio, which remains very popular; and SoundCloud, which particularly appeals to music creators for its mixing features**. For residents of the overseas departments, a paid music streaming subscription meets the needs for escape, discovery and self-affirmation they seek in listening to music.

Different listening habits among free users, and needs met by other media for listeners outside audio streaming

30% of French people said they have free access to at least one streaming platform and no subscription – these are the non-subscribers – while 21% listen to recorded music but not on streaming platforms – these are the non-users.

While non-subscribers give various reasons for not subscribing, most of them feel that free offers are enough for them (58%) and that their budget does not allow them to subscribe (41%). More than 20% also say they are not bothered by ads (22%), and 18% say they are satisfied with the sound quality. 17% feel they do not listen to enough music to subscribe and 16% prefer to listen to music in other ways (mainly the over-60s). Ethical reasons account for few responses: 5% of non-subscribers say they prefer to support artists in other ways, 3% do not subscribe for political or ethical reasons, and 1% believe the platforms do not address environmental or social issues.

For their part, **non-users mainly say they prefer to listen to music in other ways (29%), that they lack the budget to subscribe (27%), and that they do not listen to enough music to want to stream it – tied with simply not thinking of it (23%).** Only 14% of them find the ads on free tiers bothersome. Technical barriers also emerge: 11% say they do not know how to use it or are not comfortable with digital services, and 9% think they do not have the necessary equipment. Finally, as with non-subscribers, ethical reasons do not exceed 5%.

Among both non-subscribers and non-users, the vast majority appear highly tolerant of – even indifferent to – the ads they encounter when streaming for free or on YouTube. They say they are used to them and see advertising as the norm – in comparison with the other free media they consume (TV and radio) – which they have learned to manage through avoidance strategies.

The qualitative interviews thus show that, for non-subscribers and non-users, the perceived added value of paid streaming is too low to justify the price (considered high) of the offers currently available. However, this does not seem particularly problematic for them, insofar as their needs are broadly met by the other media they use (mainly radio and YouTube).

Radio remains a favorite, notably depending on context (on the move) and for its content (people value the human presence of hosts, and listening in the background to deliberately "random" content). YouTube, the video platform, also meets specific needs: searching for specific or visual content and listening via the television for non-subscribers, and an even more central, free and simple way of listening for non-users. Non-users also mention workarounds (offline downloading, ad blocking) to minimize the restrictions imposed by the platform. For the youngest respondents, social media enable highly targeted active listening ("key" moments of certain tracks featured in short videos), which can lead to creating personalized playlists of snippets.

Overall, non-subscribers and non-users perceive the "restrictions" of free options but play them down or work around them. The respondents' profiles notably include "holdouts" (opposed in principle to paying for cultural goods, and turning to illegal downloading) and "contented pragmatists" (who experience their free listening without frustration). **Unlike the holdouts, the pragmatists could be open to a paid subscription if the value proposition were different.**

Overseas territories



These broad trends are generally found in the overseas territories too, with some variations and slightly different profiles. **Overseas non-subscribers also use a range of free media and sources to listen to music.** YouTube and radio appear to be very widely used, at varying frequencies. However, the free versions of streaming platforms are not always their main listening medium, although they are increasingly competing with radio, notably for listening on the go (via Bluetooth or CarPlay), and offer a virtually infinite repertoire as an alternative to the perceived lack of diversity in radio programming.

Two profiles stand out among non-subscribers. On the one hand, those who favor YouTube for its ability to deliver familiar sounds and who use a variety of listening devices (mobile, computer, television, car radio); on the other, those who prefer Spotify or Deezer, their suggestions and specific features, and who listen to music mainly on their smartphone. These different profiles recognize the restrictions of the platforms' free versions (ad breaks, limited *skips*, etc.) but put up with them. As a result, a paid subscription holds little appeal for non-subscribers, notably given its cost and because they are not always aware of premium features.

Overseas non-users logically favor radio and YouTube, and do so on a daily basis. Radio is part of a daily listening ritual, especially during car journeys. It offers passive listening, with varied content that keeps them connected to their territory and to current events. YouTube, as a complement, is seen as a familiar platform offering a wide range of content, including music. Non-users, who are mostly older, do not use audio platforms due to lack of awareness and limited familiarity with digital tools, and are satisfied with their current habits.

Drivers of conversion to paid subscriptions identified, but enthusiasm remains very limited

Various drivers were tested in the quantitative survey among non-subscribers (30% of the total population). **Among the reasons that could convince them to subscribe, 28% support the idea of a more affordable ad-free subscription and 12% the idea of a cheaper subscription with**

some ads. Beyond price, 12% might subscribe to get better sound quality, 8% to access a larger music catalog, 6% for a platform that is easier to use, and 5% to control the settings of the recommendation algorithm. Fewer than 5% of respondents might also subscribe for various additional content or services.

The qualitative part highlights elements that confirm these trends. **Non-subscribers and non-users attach so little value to paid offers that the price they consider acceptable is two to three times lower than market standards** (currently around €12 a month). Moreover, this amount – about €5 at most – is envisaged for a service that meets their requirements for ease of use and access to a complete, unlimited, ad-free catalog. In addition, the monthly subscription model seems poorly suited to these groups. À la carte offers tailored to occasional use (a "weekend" pass, for example), as well as offers built into service bundles (notably from mobile operators) to hide the direct cost, would seem more appropriate. Extending free trial periods is also mentioned as a way to attract and win over new users. **Among young people, money remains central to their choice and is an important driver of conversion,** since many of them plan to subscribe once they enter "adult life," when they have enough purchasing power to do so.

Exclusive content, meanwhile, generates little interest among non-subscribers and non-users, notably given YouTube's free offering and the limited appeal of concerts and live content posted online. Overseas participants living in mainland France indicate that a better local music catalog could be a driver for improvement. Other, more secondary features may, at the margin, be potential drivers (e.g., automatic song recognition, karaoke, sampling, choice of versions of the same track, voice search, etc.). More generally, catalog completeness comes up often, with YouTube's depth compared favorably with that of audio streaming platforms.

When it comes to playlists and algorithmic recommendation, **a distinction emerges between older non-users and non-subscribers, who care little about controlling what they listen to, and subscribers and young non-subscribers, who value actively personalizing their listening and prolifically creating personal playlists**. For the former, algorithmic recommendation plays a positive role by personalizing without any curation effort, while the latter see it as a way to broaden their horizons.

Finally, it appears that some non-users are unaware that audio streaming exists, and some non-subscribers lack a clear view of paid features. Some, mainly non-users over 50, also mention the need to be reassured that it is easy to use. Communicating the added value of platforms and paid offers therefore seems key.

Beyond these drivers, the quantitative survey above all reveals that 51% of respondents would not subscribe for any of the reasons listed above (with a higher representation of moderate streaming listeners, which confirms their low overall interest in this way of listening, and, conversely, a small share of under-25s and very frequent listeners, who are therefore more inclined to subscribe). This finding underscores the low propensity of non-subscribers and non-

users to convert. The free alternatives and workarounds they have put in place work for them. They are not actively looking for a solution since, for them, there is no real problem to solve.

Artist remuneration models and artificial intelligence on platforms: little-recognized issues

The quantitative survey shows that 38% of French people broadly know how artists are paid on streaming platforms (with under-35s, executives, intermediate occupations, and frequent music listeners overrepresented in this group). Of these, more than half (53%) have a good opinion of how this remuneration works. Although most of the groups of non-users and non-subscribers interviewed were unaware of the artist remuneration model, they felt that fair pay for artists could improve a platform's image without being a driver of conversion. The group of young subscribers from Île-de-France (leaning CSP+ and urban) was better informed on the subject and interested in the *user-centric* model, which could justify their decision to pay for a subscription.

While 87% of French people say they know what AI-generated music is, only 39% of them said they knew that streaming services offer it on their platforms. The vast majority of respondents prefer to listen to music created by human artists and want music generated by generative AI tools to be clearly labeled on platforms (93% for both items). Nearly 80% see a risk of human artists being replaced on platforms. On the other hand, a third of respondents value AI's ability to offer music tailored to specific tastes, and more than 40% believe AI-generated music enriches the available catalog. Very frequent listeners are overrepresented in these last two groups. This ambivalence is also found in the qualitative part. Respondents view AI-generated music either with suspicion or as an opportunity. **Poor handling of this issue by platforms could become a major reason for rejection, while a clear, ethical stance is a source of reassurance and trust**. Beyond content, some personalization features based on AI tools could interest users while raising concerns about data privacy.

Overseas territories



Among respondents in the overseas territories, expectations of platforms focus on three things: the control over listening that a subscription provides, **features that let them cultivate their individuality** (stepping away from the *mainstream* to find their own style, through ultra-personalized recommendations) and **greater visibility for local music** (e.g., creating labeled playlists, adding older tracks that are currently missing from catalogs, supporting local artists).

Ultimately, **the qualitative part of the study helps identify drivers (on price, features, etc.) that nonetheless do not seem able to immediately convert non-users who are satisfied with their current habits and generally disinclined to pay for this type of service**. Non-subscribers are

also not very responsive to the drivers identified, as they are generally satisfied with their use of the platforms' free versions. Notably, a degraded free tier (less variety and accessibility, more advertising time) could lead them to subscribe, provided the price remains reasonable in their view. Among teenagers, young people and students who are non-subscribers, the desire to subscribe often runs up against a prohibitive financial reality. However, the prospect of greater purchasing power, notably when they enter the workforce, could make this wish a reality. Because they are familiar with how platforms work and their benefits, young people are considered the most convertible target in the medium term. **Subscribers, for their part, see themselves using platforms over the long term and ultimately seem to expect few changes from them.**

Audio streaming subscriptions: second only to video streaming subscriptions

The place of audio streaming among other cultural practices highlights broader financial trade-offs that work against audio streaming subscriptions. The quantitative survey shows that audio streaming platforms rank second among cultural subscriptions held (cited by 38% of respondents), well behind video-on-demand platforms (Netflix, Disney+, myCANAL…), mentioned by more than half of the population (51%). However, these two types of subscriptions account for the majority of responses, with other paid services each at no more than 15%: movie channels (12%), gym (11%), sports channels (10%), among others. At the same time, a third of French people say they have no subscriptions at all, which seems to confirm the trend observed among non-subscribers and non-users of a certain satisfaction with free offers.

Finally, audio streaming platforms are perceived as less necessary than video-on-demand platforms: 48% of video-on-demand subscribers consider this subscription essential (30% cite it first), compared with only 24% of music streaming subscribers (10% cite it first). While young people appear more attached to the platforms (video and audio) they subscribe to, intermediate occupations and clerical and service workers are more attached to their video-on-demand subscriptions, whereas executives are more attached to their music streaming subscriptions.

05

Conclusion

Through an ambitious approach combining quantitative and qualitative methods, the Centre national de la musique has highlighted the still-prominent place of music in French people's lives, as well as the major position of streaming in listening habits and the issues surrounding paid subscriptions.

While music radio remains the benchmark for listening to music, audio and video streaming platforms are growing and are also emerging as essential media for most listeners, especially young people. A similar dynamic can be seen in discovery: radio remains the primary source of access to new releases, while audio and video streaming platforms still play a secondary but growing role.

The three main listening media identified (radio, video streaming platforms and audio streaming platforms) coexist differently depending on listener profiles. Audio streaming subscribers concentrate their listening on the platforms they subscribe to. For them, radio and YouTube are less essential media, used less often – except for overseas residents, for whom these media are just as important. Non-subscribers and non-users, by contrast, build free, multi-source listening worlds in which radio and YouTube occupy a more central position.

Nearly 40% of French people have access to at least one paid subscription, mainly through an individual plan. The switch to a subscription was most often driven by the ability to listen to a very rich music catalog with unlimited, ad-free access. Subscribers, the vast majority of whom have no plans to cancel or return to a free tier, show strong attachment to and high satisfaction with their platform. They see themselves using it over the long term and have very few expectations in terms of change.

Non-subscribers (30% of the population) and non-users (21%), for their part, are content with the way they listen to music, and most have no plans to change their habits. While the former are satisfied with free offers, the latter prefer to listen to music in other ways, through other media. They are highly tolerant of advertising and generally find the price of paid offers too high for their budget, with some questioning the monetary value that can be placed on music as a cultural good.

Of the drivers of conversion to paid subscriptions identified, few generate immediate support or seem likely to lead these groups to subscribe. Nevertheless, several avenues for reflection emerge. The first would be to offer entry-level plans that exclude certain features but are more affordable and suited to occasional use, in order to capture casual users.

Non-subscribers and non-users also report a lack of information about the benefits of paid offers. The advantages of paid subscriptions (ease of use, unrestricted access compared with

video platforms) appear to be little known among non-subscribers and non-users. The youngest, who are better informed about the advantages of paid tiers, seem more likely to convert, particularly when they enter the workforce and their purchasing power increases. Developing extended free trials in partnership with schools, universities or employers appears to be a relevant strategy for reaching them.

While transparency on artist remuneration and artificial intelligence (with labeling of content generated wholly or partly by artificial intelligence and the option to exclude it from recommendations) does not yet appear to be a deciding factor for the majority, it can enhance platforms' reputations.

For overseas non-subscribers and non-users, the challenge would be to make locally produced music more visible. An "Overseas" label developed in partnership with the platforms, guaranteeing that local artists are showcased, notably through dedicated playlists, could be created. Likewise, an effort to put older catalogs online (focusing notably on local traditional genres such as Gwo ka, Séga, Maloya, Biguine, etc.) would make this music accessible and attract new listeners, particularly in these territories.

The trends identified in this study reveal that listening habits are fairly entrenched across the different types of music consumers. This supports the prospect of current subscription trends continuing, with slow, gradual conversion driven mainly by generational renewal.



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