

Centre national
de la musique



How do French jazz fans listen to music?
Barometer of music engagement in France
2023 edition

Preamble

The Centre national
de la musique
(CNM)

Preamble

The Centre national de la musique, the common house of music in France

The CNM was **established on January 1st, 2020** and operates under the aegis of the **French Ministry of Culture**



It acts as a hub, providing a **platform for discussion, observation and funding mechanisms** to **support French music professionals** nationally and globally

The law entrusts the CNM with **12 missions**



Preamble

Three hubs dedicated to knowledge



Data

Data collection in compliance with confidentiality, security and GDPR

Data processing and management

Data sharing

MusicDB: Data base gathering information about contacts and structures of the French music sector



Studies

Observe, describe and **analyze** the social and economical dimensions in the music field

Various specific angles of studies:

- Live music
- Recorded music
- Music broadcast
- Use and practice
- Employment and remuneration of artists



Monitoring, foresight & resources

Weekly news feeds to provide a comprehensive overview of the latest developments in the music industry in France and abroad



Ideas lab developing a **research program of publications** covering a wide variety of themes to anticipate evolutions of the music sector:

- Business models
- Music practice
- Diversity
- Climate transition
- Digital economy
- Europe
- Heritage
- Innovation

Preamble

Various publications to better describe and understand the sector



Studies

Live music



Festivals: budget structures and post-pandemic challenges



Market figures of live music and entertainment shows

Music broadcast



Musical diversity in music broadcast

Recorded music



Stream manipulation EN



Music streaming: impact of UCPS settlement model EN



Export certifications

Use and practice



Barometer of music engagement in France 2023 EN



Monitoring, foresight & resource



Two collections



Music and data



Music in motion
Outlook of the music sector for 2030

A few examples of publications EN

Investing in French and Foreign Music Catalogues



Digital Data in Music Export



Live Music and Gen Z



Reducing gendered inequalities in music

01 .

Methodology



Methodology

A survey conducted by Ipsos amongst over 4,000 people, aged 15 and over, representative of the French population in metropolitan France



Sample
of 4,035 respondents



Survey period
From May 3 to 11, 2023



Online survey



- In this study, **jazz fans** correspond to respondents who selected “Jazz / Blues” as one of the top 5 genres listened to, live and recorded, over the past 12 months.
- The following figures on jazz fans refer to their **overall music consumption**, not only their jazz consumption.

02 .

Key figures



Description of French jazz fans

Less than a quarter of the French population say they listen to jazz music

Amongst French people who declare that they listen to music
at least one minute a day on average



20%

 listen to **jazz on
recorded media**

i.e. **792** respondents



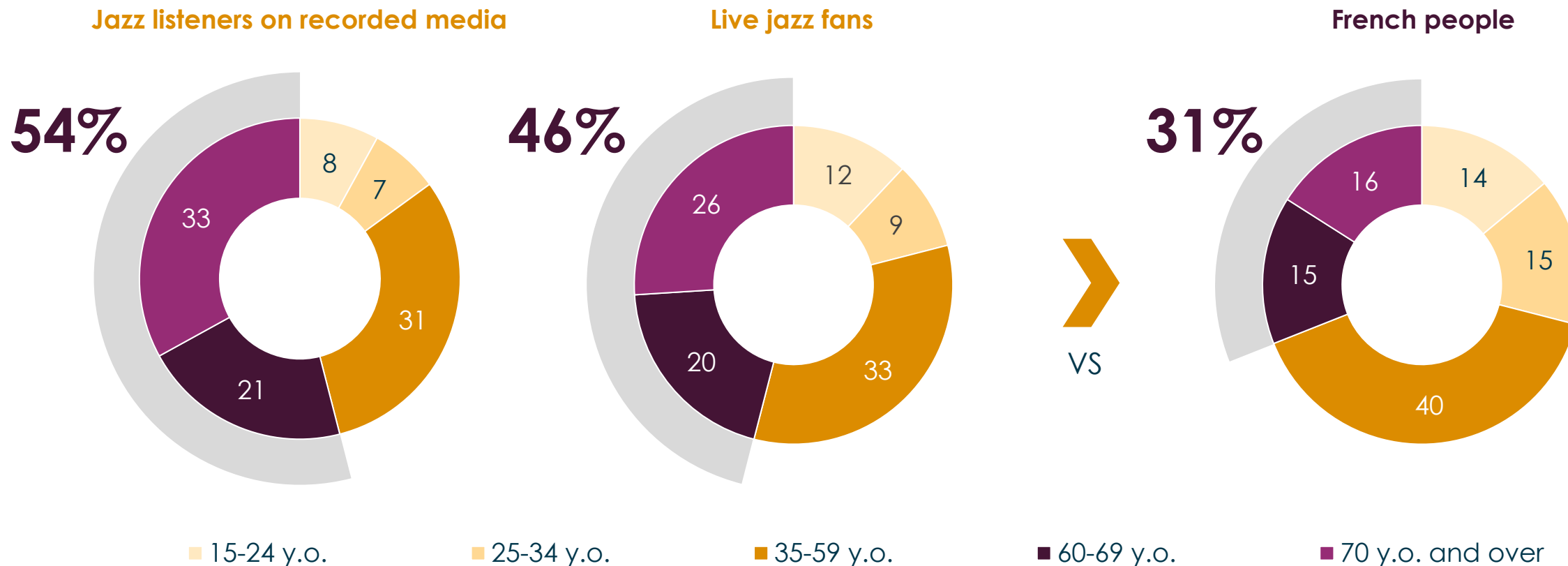
13%

 listen to **live jazz**

i.e. **532** respondents

Age distribution of French jazz fans

While recorded jazz listeners tend to be slightly older than live jazz fans, both are older than the average French population



Based on recorded jazz listeners, i.e. 792 respondents

Based on live jazz listeners, i.e. 532 respondents

Based on the entire sample, i.e. 4 035 respondents

Relationship to music 1/2

French jazz listeners seem to be particularly attached to music



Recorded music



82%

of jazz listeners say that music takes **an important place** in their lives

vs **76% of all respondents**



2hr 22min

on average **listen to music** every day

11 min more than the average French music listener (i.e. 3,771 respondents)

Relationship to music 2/2

Live jazz fans are even more attached to music



Live music



88%

of jazz listeners say that music takes
an important place
in their lives

vs **76% of all respondents**



2h 37min

on average **listen to music**
every day

26 min more than the average
French music listener
(i.e. 3,771 respondents)

Music genres

After jazz, the genre that these fans listen to most is Mainstream pop, both live and recorded



Recorded music

Average jazz listeners

Average French music listeners

Jazz / Blues

100%

Jazz / Blues

21%

Mainstream pop /
Chanson française

64%

Mainstream pop /
Chanson française

67%

Pop / Folk

42%

Pop / Folk

50%

Rock / Punk

40%

Rock / Punk

43%

Classical music

39%

R&B / Soul

31%

Traditional folk and
global music

29%

Funk / Disco

30%

Based on recorded jazz listeners, i.e. 792 respondents



Live music

Average live jazz listeners

Average French music listeners

Jazz / Blues

100%

Jazz / Blues

22%

Mainstream pop /
Chanson française

61%

Mainstream pop /
Chanson française

62%

Pop / Folk

41%

Pop / Folk

44%

Rock / Punk

35%

Rock / Punk

40%

Traditional folk and
global music

35%

Traditional folk and
global music

26%

Classical music

29%

Rap / Hip-Hop

25%

Based on live jazz listeners, i.e. 532 respondents

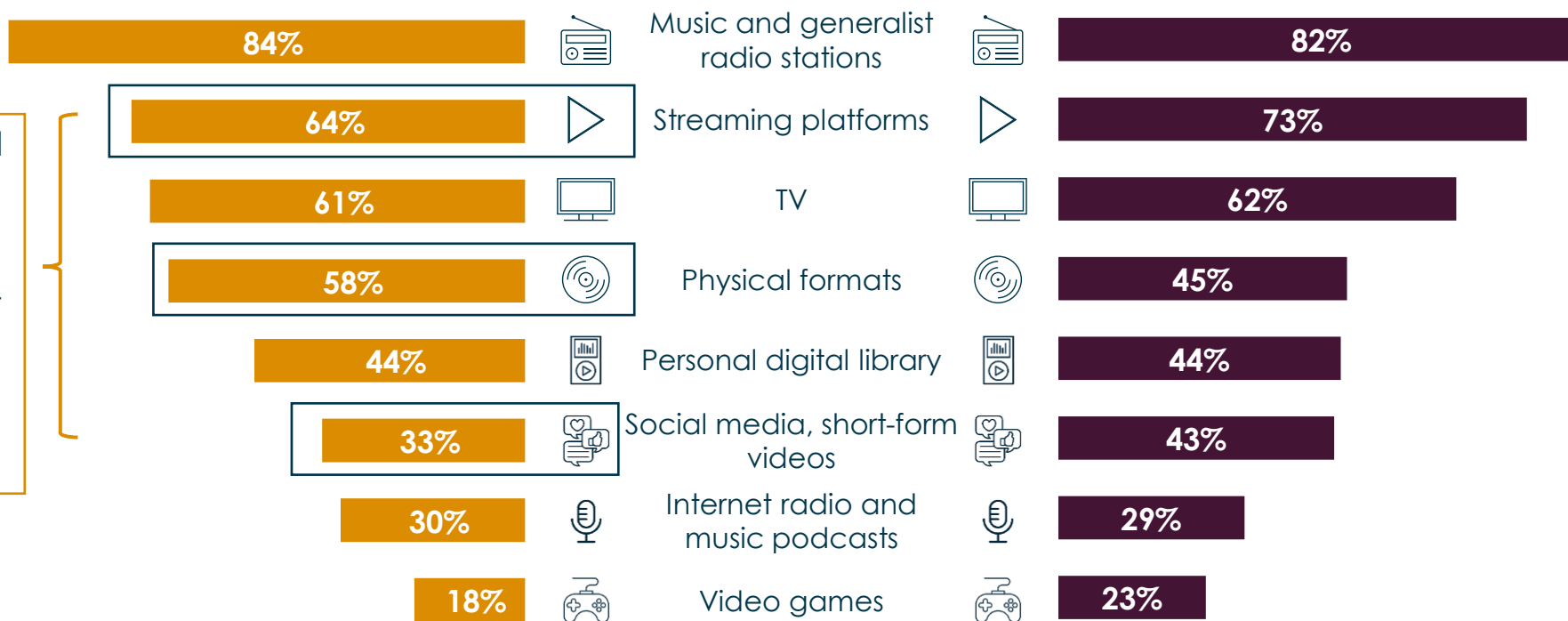
Recorded music: Listening formats

Like the average French music audience, jazz fans prefer to listen to radio stations, streaming platforms and TV at least once a month

Average jazz listeners

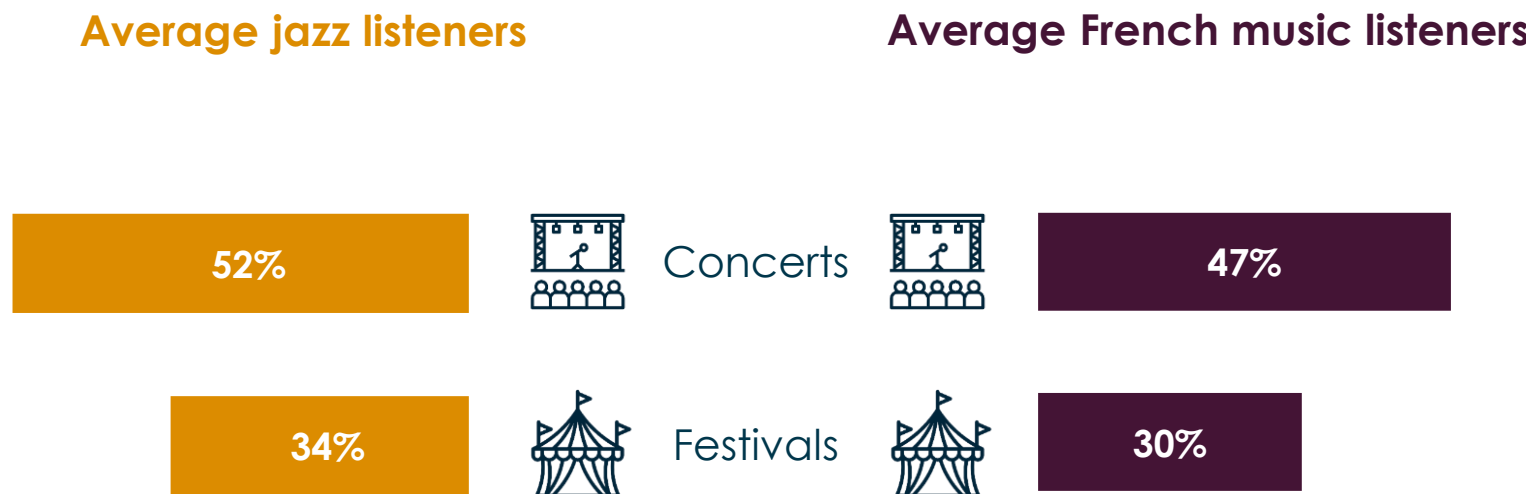
Average French music listeners

Jazz listeners tend to **opt less for streaming platforms and social media**, but **more for physical formats** than the average French music listener



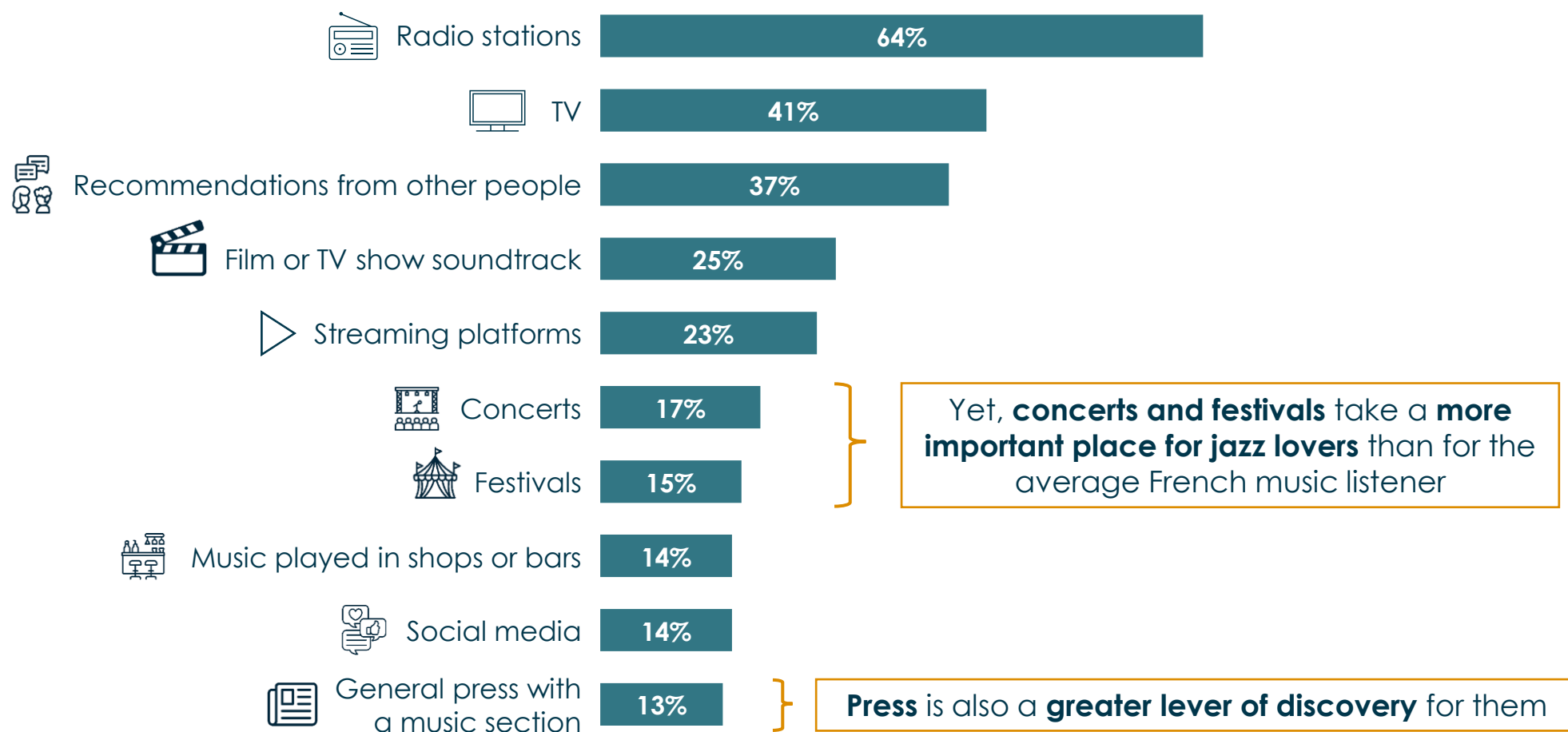
Live event attendance

More than half of jazz fans attend a concert while more than a third of them go to a festival at least once a year, a bit more than the average French music listener



Music discovery sources

Like all French music listeners, jazz fans mainly discover music on radio stations, TV and thanks to word to mouth



03.

Concerts & Festivals



Concerts and festivals attendance

Live jazz fans prefer smaller venues and festivals than the average French live attendee

Venues



52%

Bars/club

vs 46% of all French live attendees
(i.e. 2,340 respondents)



46%

Small- or medium-sized venues

vs 40%



38%

Theatres, cultural centers...

vs 33%



35%

Arena

vs 42%

Festivals



41%

Boutique festivals

vs 36%



36%

Small- and medium-sized festivals

vs 32%



27%

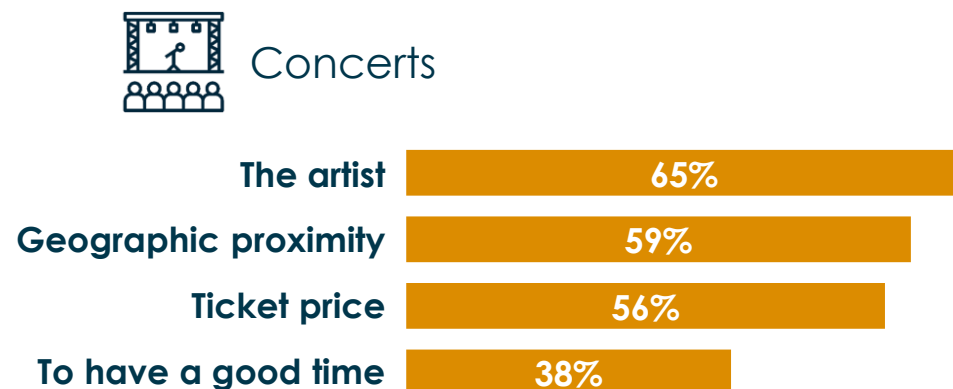
Major festivals

vs 26%

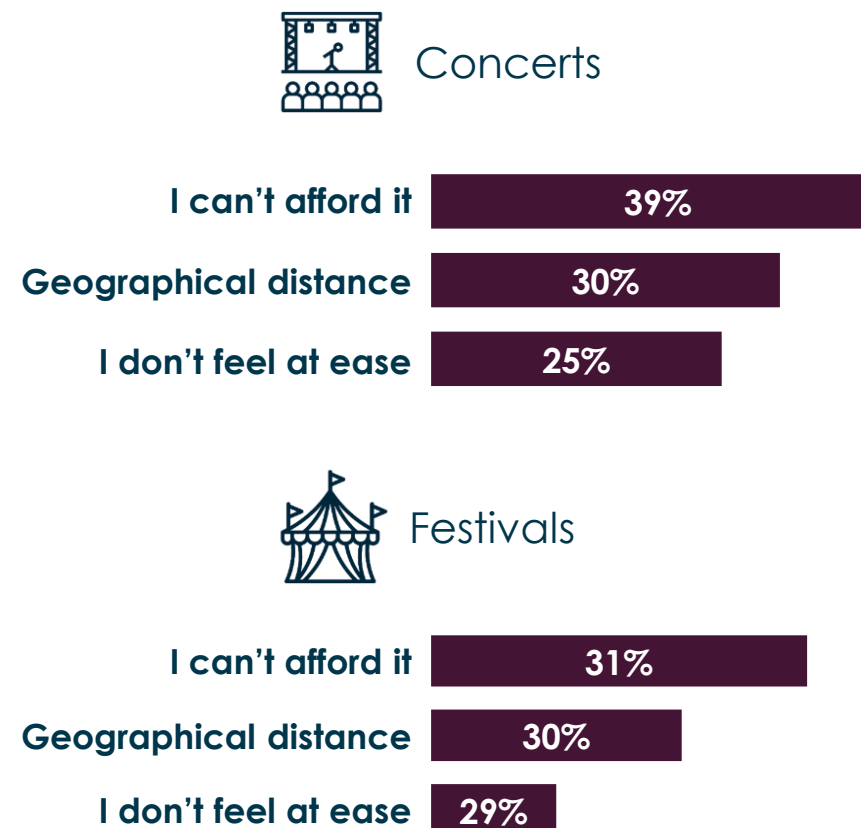
Levers and brakes for attending a live event

The event's line-up is the main reason why live jazz fans go to concerts and festivals

Levers



Brakes



04.

Radio Internet radio & Podcasts



Listening to music on the radio

More than 8 jazz fans in 10 listen to music on radio stations, mostly because it's easy to have it playing in the background

84%

Radio stations

(generalist and musical)

vs 82% of all French listeners

including



69%

Generalist radio stations

vs 58%



61%

Music radio stations

vs 68%

Levers



Brakes*



Listening to music via Internet radio

Internet radios attract almost 20% of jazz fans thanks to their free service, rare ad breaks and cutting-edge selection



19%

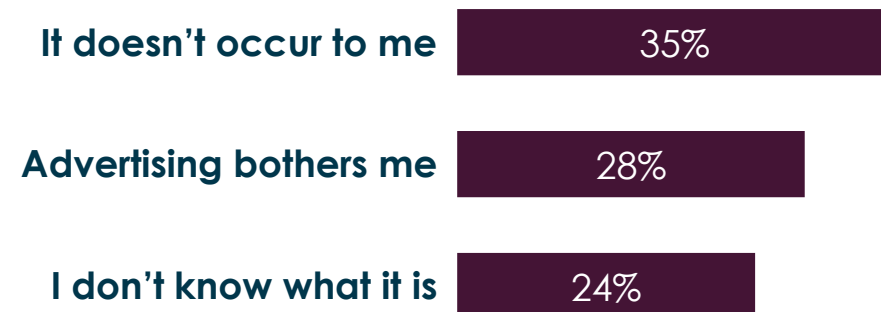
Internet radio

(stations only accessible via the internet)
vs 19% of all French listeners

Levers*



Brakes



Listening to music via music podcasts

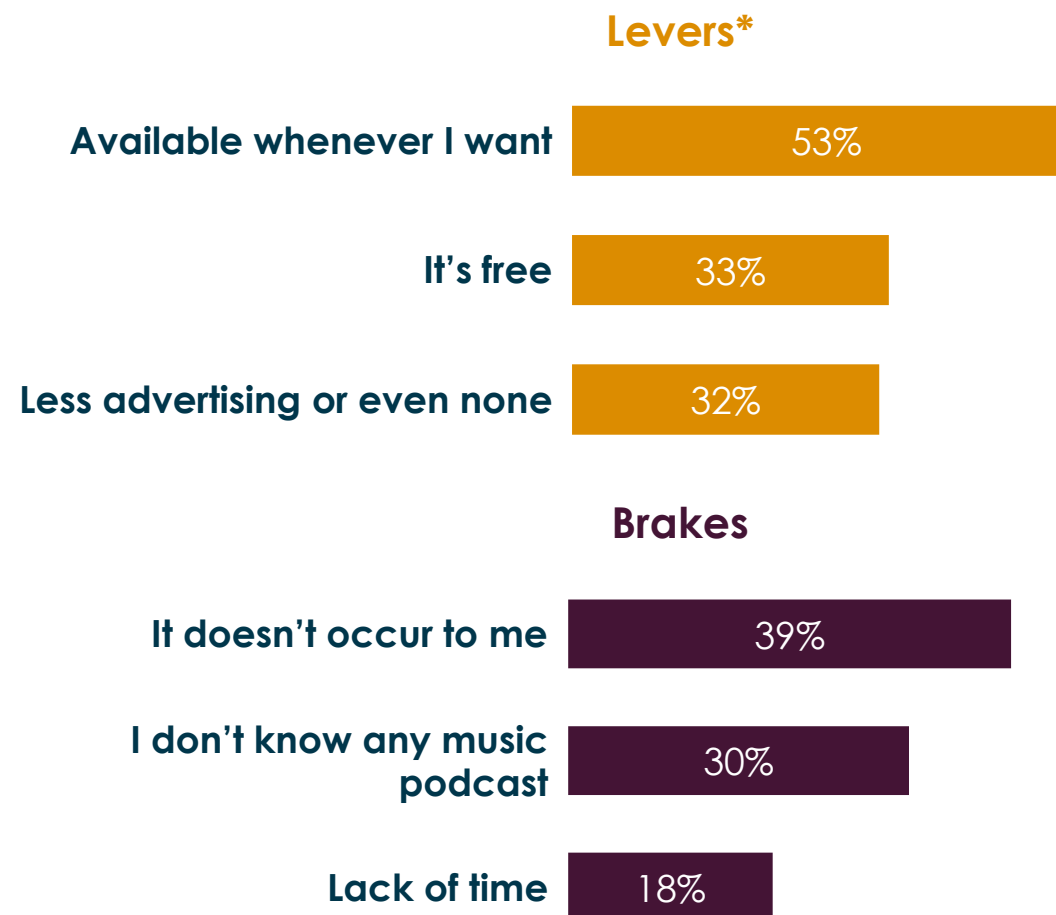
1 jazz fan out of 5 listen to music podcasts because of their convenient free format



21%

Music podcasts

(native or on-demand music shows)
vs 21% of all French music listeners



05 .

Streaming platforms



Listening to music on streaming platforms

64% of jazz fans listen to music on streaming platforms, mainly on video platforms

  **53%**

Video streaming platforms

vs 60% of all French music listeners

Levers:

It's free

61%

I can do something else
at the same time

40%

Music unavailable on other
platforms

35%

  **39%**

Audio streaming platforms

vs 48%

Levers for listeners with a paid subscription:*

No adverts

55%

Music catalog

50%

- Music available offline
- Themed playlists
- Create and share playlists
- I can do something else at the same time

29%

  **10%**

Collaborative streaming platforms

vs 13%

Levers:*

Music unavailable on other
platforms

36%

In-depth information about
the songs and albums

33%

Not so much adverts

33%

Type of subscription to streaming audio platforms

More than half of jazz lovers who listen to music on audio streaming platforms use a paid subscription, most often at their own expense



56%

have a
paid subscription

vs 60% of all listeners to streaming
audio platforms



48%

have a
free access

vs 45%



45%

of them **pay in full or share the cost**
of their subscription*

vs 47%

About **three quarters** of jazz music listeners on streaming audio platforms have an **individual subscription***

Individual subscription

73%

Multi-user subscription

22%

Student discount subscription

8%



Barometer of music engagement in France

Focus on jazz listeners



Listening to music on TV

Jazz fans tend to watch less music videos than the average French music listener, but they appreciate music shows and concerts recordings a bit more



30%

Music videos

vs 41% of all French music listeners



44%

Music shows

vs 43%



29%

Concerts recordings or broadcasts

vs 24%

Levers



Brakes



07.

Physical formats



Listening to music on physical formats

Jazz listeners feel more attached to CDs and vinyls than the average French music audience



54%

CD

vs 41% of all French music listeners



22%

Vinyl

vs 17%



9%

Cassette tape

vs 9%

Levers

I like to own physical formats

53%

It's an habit

43%

I can do something else at the same time

40%

Brakes

Not very practical

40%

No suitable listening device

33%

No particular attachment to physical formats

26%

08 .

Social media
Short-form videos



Listening to music via social media and short-form videos

Jazz fans are less about to listen to music on social media and short-form videos than the average French music audience

33%

listen to music
on **social media** or via **short-form videos**
vs 43% of all French music listeners

including



27%

on **social media**

vs 36%



22%

on **short-form videos**

vs 33%



09.

Video games

Listening to music via video games

Nearly 1 jazz fan out of 5 listens to music via video games



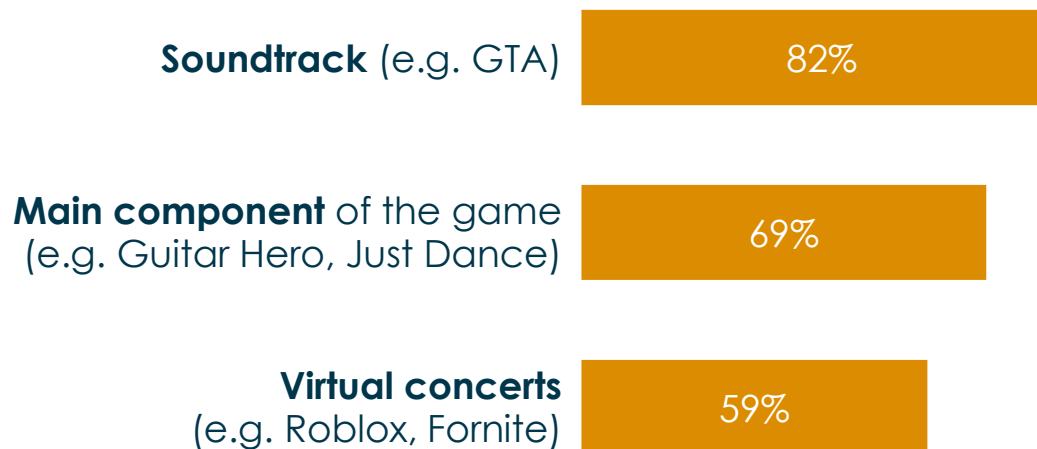
18%

listen to music
via **video games**
vs 23% of all French music listeners



The music listened to on video games
is most often the **soundtrack**

The music they listen to is **regularly** part of:*



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