

# KANTAR HOFFMANN

## Open Music Hungary Report

December 2025

25S12125



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# 1 Summary



# Summary I.

## Target group segmentation

- By **attitude to music**, the Hungarian population aged 16+ can be divided to „Addicted” (30%), „Disconnected” (26%) and „In between” (44%)
  - Young and highly educated people are over-represented among „Addicted”

## General Evaluation of live music

- Live music is **important** to 33% (66% among „Addicted”), while not important for 36% („Addicted” 8%)
  - In general, music is important to 50%, while not important for 19%
- Live music **opportunities** in the respondent’s neighbourhood are moderate (3,0 on 1-5 scale)
- The main **drivers** of live music events are reasonable pricing and attractive portfolio of music genres
- The main **barrier** to attend a live music event is much more the lack of time rather than the expenses.
  - Among „Disconnected”, the major difficulty is the lack of interest

## Live music consumption habits

- As to live music **types**, these are much more connected to festivals and bars than e.g. to restaurants
  - „Addicted” more prefer festivals and big concerts than „Disconnected”, while less prefer private events
- The major **style** of live music events is popular music
  - „Disconnected” prefer Hungarian folk, gypsy and party/wedding music to an above average extent
- Only 17% of live music events **lasts** longer than one day (23% in the case of „Addicted”)
- As to the **respondent’s company**, „Addicted” are mostly with friends, „Disconnected” mostly with the family
  - Live music occasions are not single-person events (only 4% attend such events alone)

## Summary II.

- Live music related expenditures**
  - If you have to buy any **ticket** to a live music event (which is only 28% of the live music events), its average price amounts to HUF 14 000 („Addicted”: 15 000)
  - Buying **food and drink** are the most widespread additional costs (in 53% of events), amounting to HUF 12 000
  - **Accommodation** can be the largest cost item (HUF 27 000) but this is spent only by 3% of live music attendants
  - **Travel** costs of a live music event account for HUF 8 000 for half of the attendants, while no costs for the other half
- Circumstances of live music events**
  - The preferred **venue sizes** are varied, there is no exceptional preference for any size
  - Male **performers** are more frequent in live music events, especially on the events attended by „Disconnected”
  - Messages about **environmental sustainability** of a live music event are relatively rare and are perceived mostly by „Addicted”

## Summary III.

### Music listening habits

- Listening to music in **foreign languages** is rather likely (83% in English, 67% in other languages)
- The main **sources** of music listening are the radio (79%), YouTube (69%) and the TV (64%) but downloading (35%) and streaming (29%) are not negligible, either
  - Music listening is much more widespread at home, compared to at work/school or traveling
  - At home, the main source is YouTube, while at work/school/traveling is the radio
  - Among „Addicted“, YouTube is dominant (84%)
- The **duration of time** of music listening is longest in the radio (e.g. 96 minutes at home in a working day), while short during travel
- The penetration or recognition of **AI-related** music is at a moderate level, 28% (but 44% among „Addicted“)
- Users of streaming services prefer automated **playlist** to the manual ones
- Spending on **special music-related products/services/activities** is very small in Hungary, both in penetration and in the sum of money

## Summary IV.

### Background music

- People meet background music **most frequently** in retail shops (34%)
  - „Addicted” recognise background music more often (60%) than „Disconnected” (29%)
- The quality of background music is an influential factor whether **to return or not to a restaurant/café/ pub** (e.g. extremely/very influential for 24% of „Addicted”)
- However, **willingness to pay more** for good background music is relatively limited even among „Addicted”

### Professional musicians

- Only 4% **played a musical instrument** and 9% **sang** in the last 12 months, mostly for not an audience
- The share of **professional musicians** amount to only 0,1% in the sample (and semi-professionals: 0,3%)
- Only 1% get any **music related income** (not only professional musicians but also semi-professional ones, and amateurs)
- **Recording own music** is negligible in the sample
- The intention of amateur and semi professional musicians **to become professional** is rather weak
- Among amateur, semi professional and professional musicians, **spending on equipment and training** is low in both penetration and the sum spent for this
- 44% of the population think that musical artist should receive **compensation if their music is used by AI**



## 2

## Segmentation by Attitude to Music

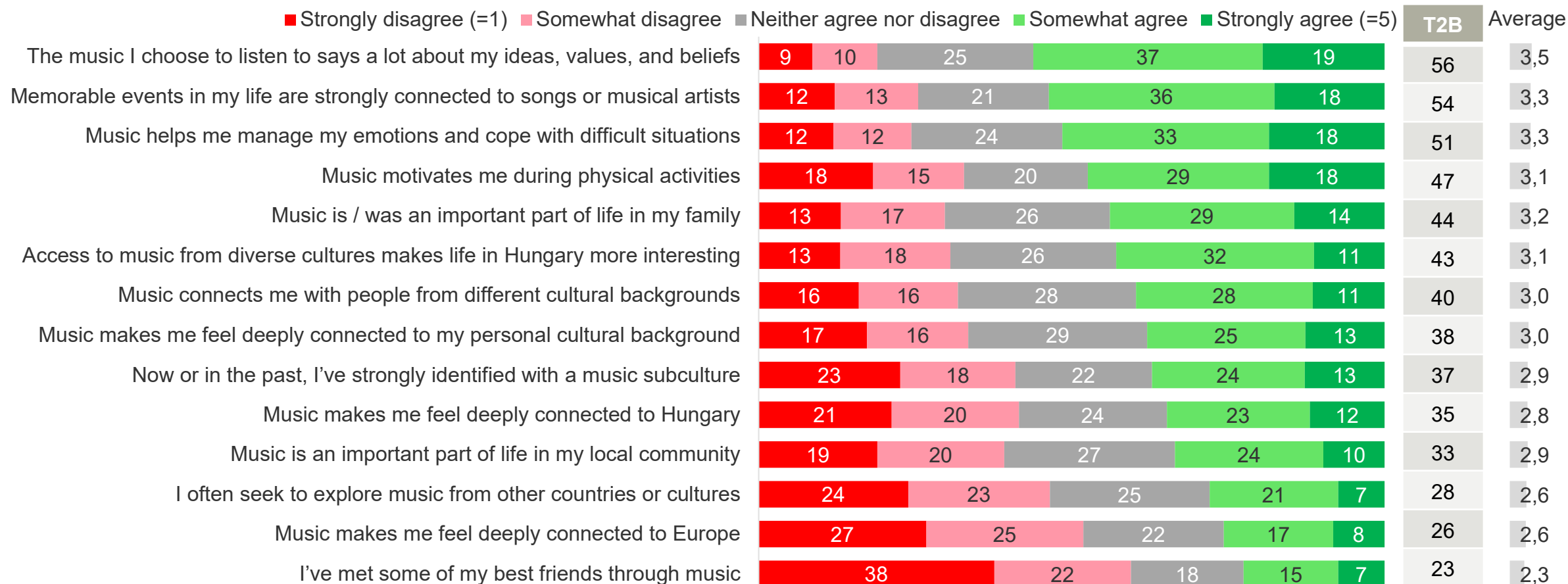




# Music can much more give emotional support in personal life than can influence feelings toward Hungary or other big entities, such as EU or foreign countries

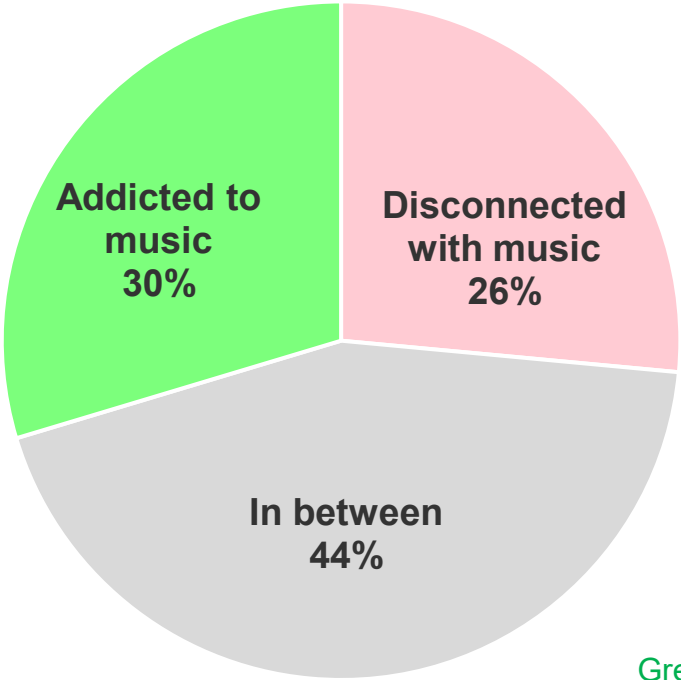
## Attitude to Music

(Distribution /%/ and Average)



The Hungarian population can be divided into three large segments according to their relationship to music. Young, highly educated and those living in West Hungary are over-represented among „Addicted”, i.e. those having strong ties to music.

Segments by Attitude to Music



Green/Red figures are significantly larger/smaller than the average

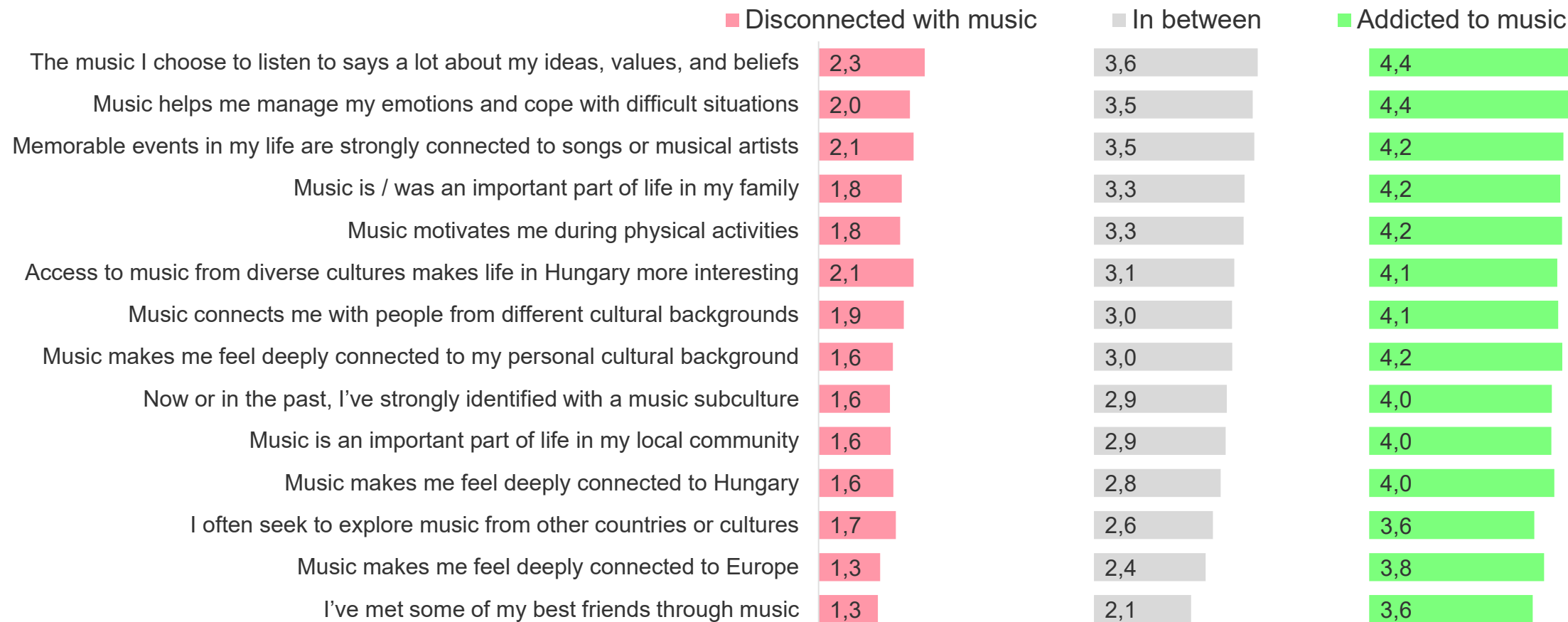
%	Disconnected with music	In between	Addicted to music
<b>GENDER</b>	n=268	n=444	n=300
Male	47	50	44
Female	53	50	56
<b>AGE</b>			
16-29	8	18	25
30-39	15	16	15
40-49	19	20	19
50-64	22	25	22
65+	36	21	18
<b>EDUCATION</b>			
ISCED 1-2	22	18	20
ISCED 3	65	64	53
ISCED 4-8	13	18	26
<b>FAMILY STATUS</b>			
Married or remarried	52	48	41
Single living with a partner	10	15	14
Single	13	18	27
Divorced or separated	11	11	11
Widower	14	8	7
<b>SETTLEMENT TYPE</b>			
Budapest	16	18	21
County center	22	20	22
Other town	30	35	29
Village	32	27	28
<b>REGION</b>			
Middle Hungary	23	25	27
East Hungary	64	55	43
West Hungary	13	19	31
<b>FINANCIAL DIFFICULTIES</b>			
Most time or occasionally	22	17	10
Almost never / never	78	83	90



## „Addicted” are very strongly tied to music in almost every respect, apart from the impact of music on the attachment to foreign countries/cultures

### Attitude to Music by Segment

(Average on 1-5 scale)



### 3

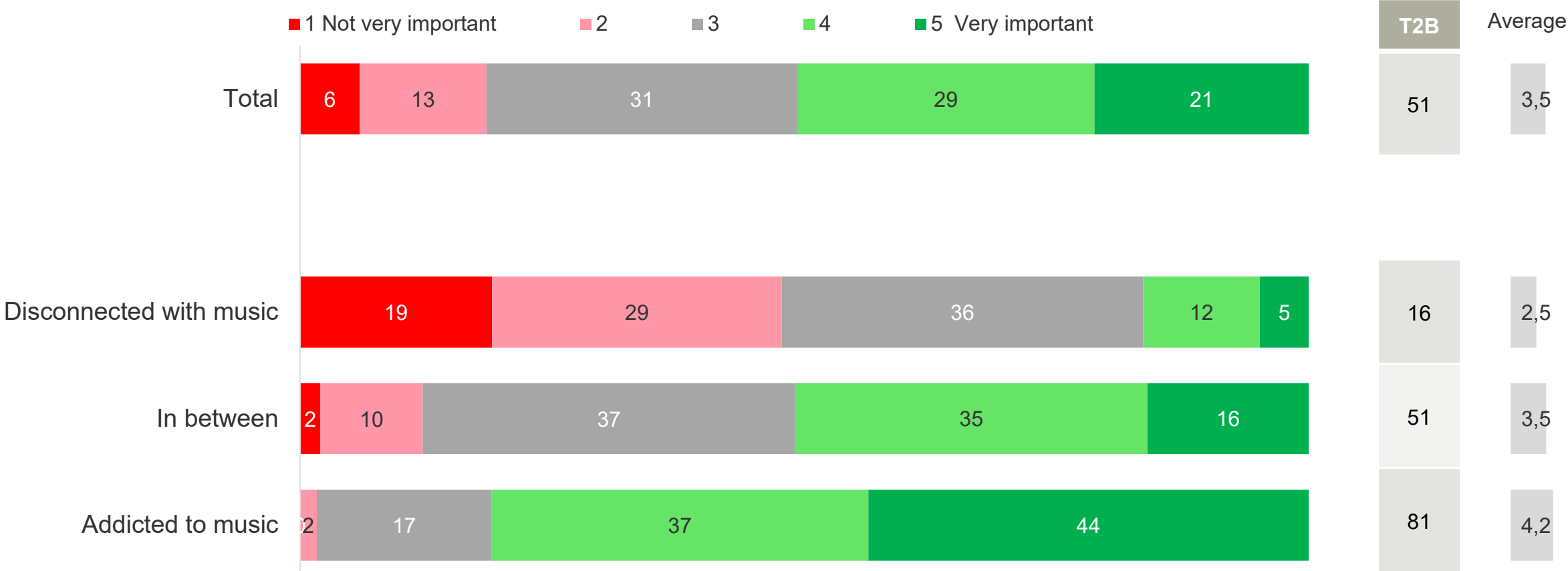
## Music-related Habits in General





# For half of the population, music plays an important role in their lives

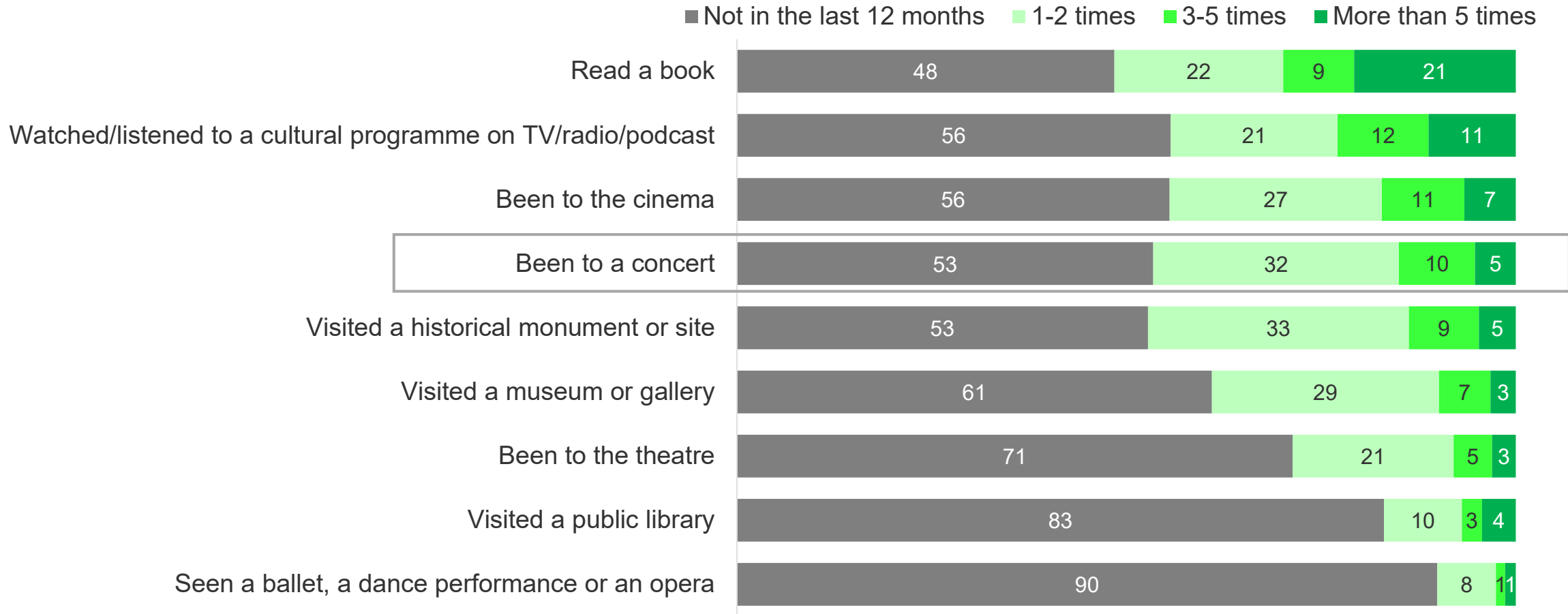
Importance of Music in the Respondent's Life  
(Distribution /%/ and Average)





# Half of the target group was in a concert in the last 12 months

## Cultural Activities in the Last 12 Months (%)

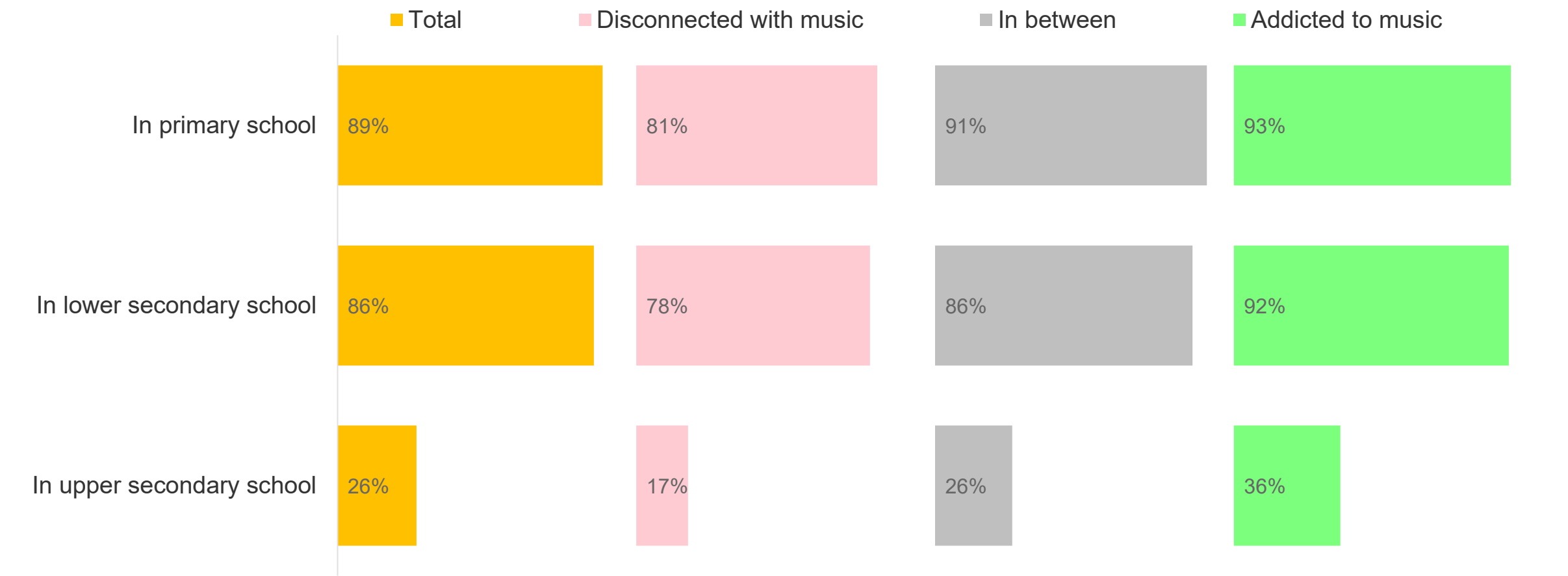






# Most people had music-related education at school in his/her childhood, as part of their general curriculum

The Respondent's School Education on Music (instruments, singing, music history)

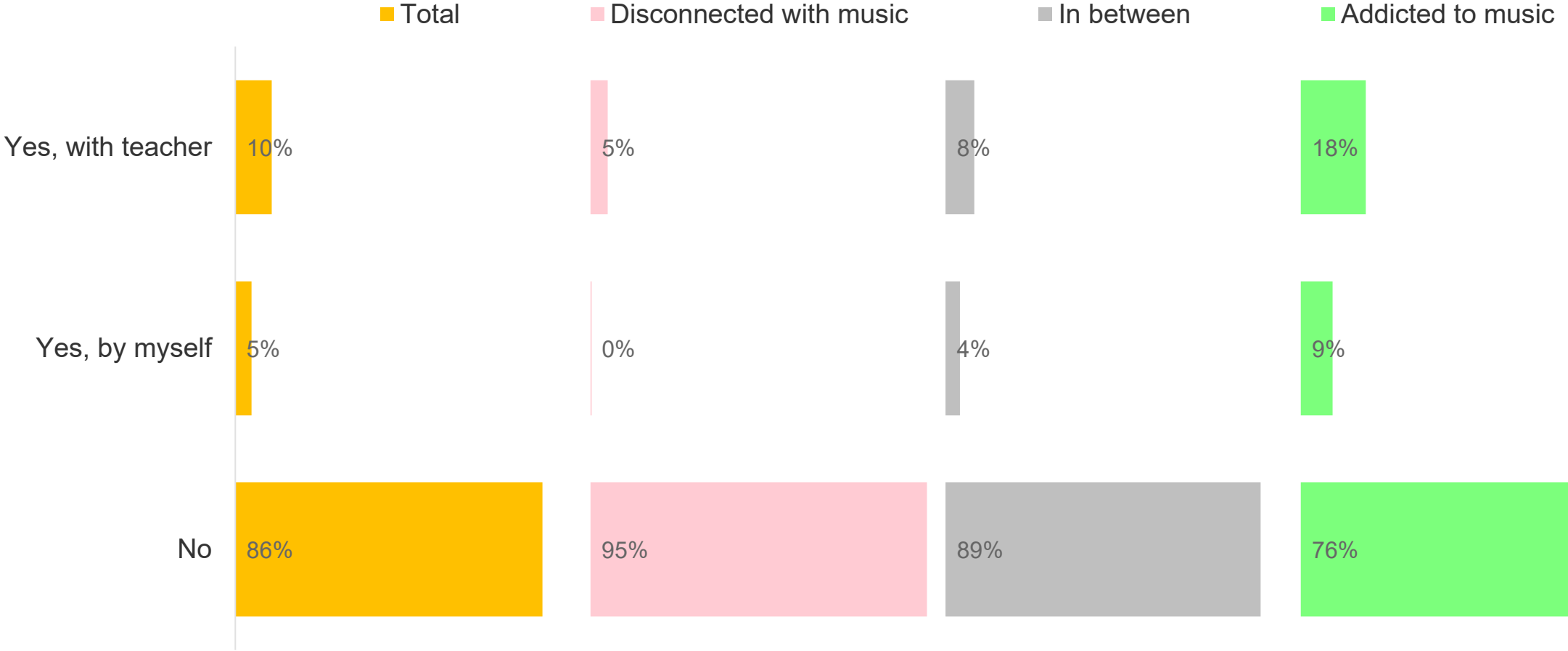






# Music education outside the school was relatively moderate in the respondents' lives

The Respondent's Education outside the School on Music (instruments, singing, music history)



# 4

## Live Music



## 4.1

### General Evaluation of Live Music





# Live music is important for a third of the population

Importance of Live Music in the Respondent's Life  
(Distribution /%/ and Average)

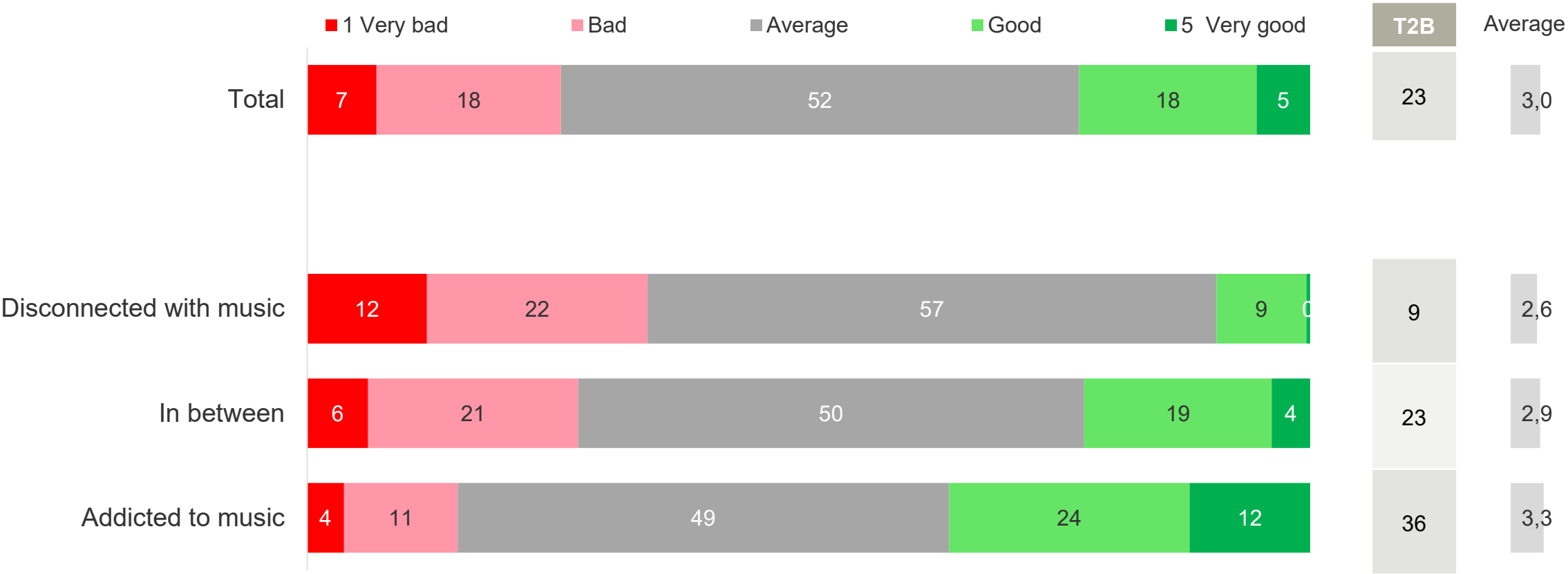






# Assessments of live music opportunities in the neighbourhood are rather moderate

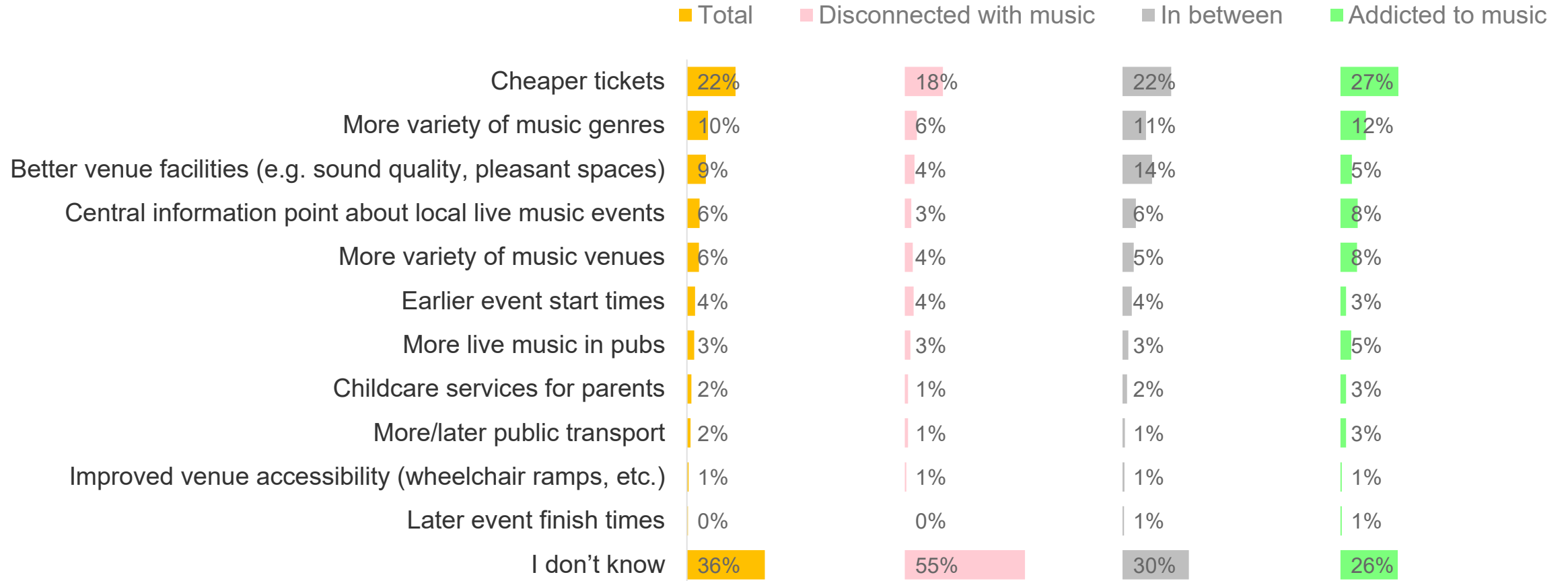
Evaluation of Live Music Opportunities in the Respondent's Local Area  
(Distribution /%/ and Average)





# Reasonable pricing and attractive portfolio of music genres are the main drivers to encourage participation in live music events

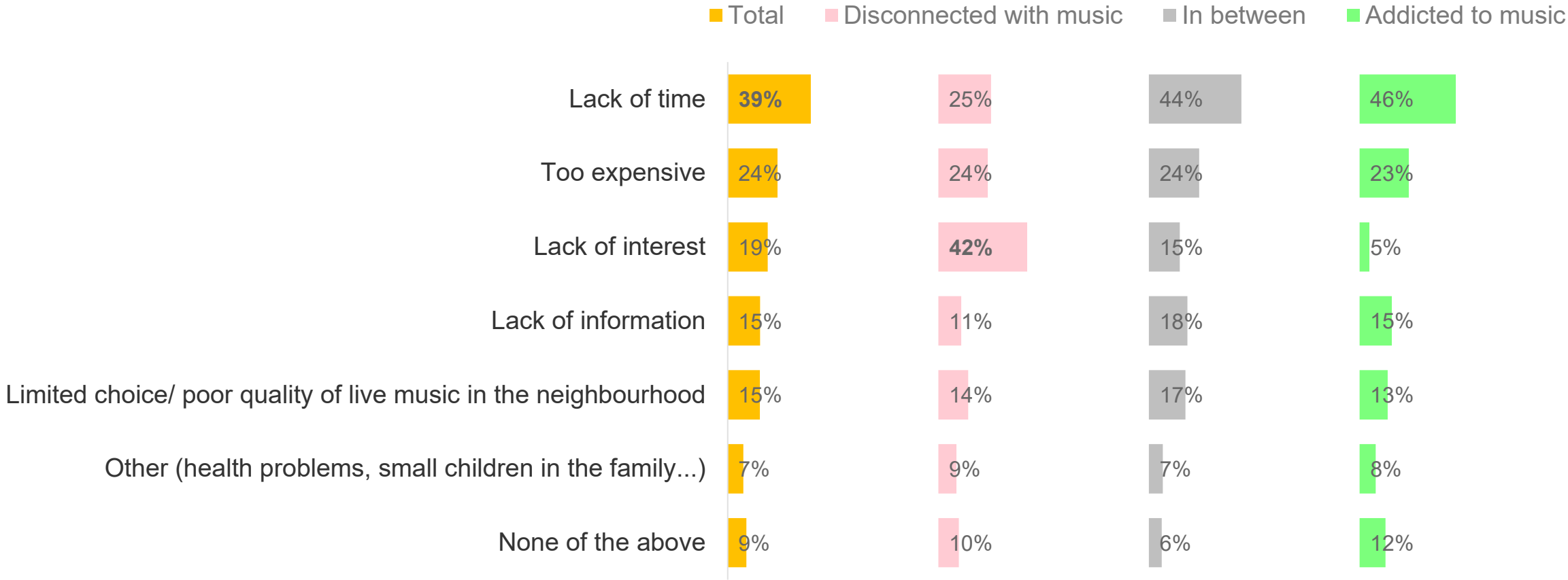
## Encouraging Factors to Attend Live Music Events





The main barrier to attend a live music event is much more the lack of time rather than the expenses. In the case of „Disconnected”, the major difficulty is the lack of interest

Obstacles to Attend Live Music Events





## 4.2

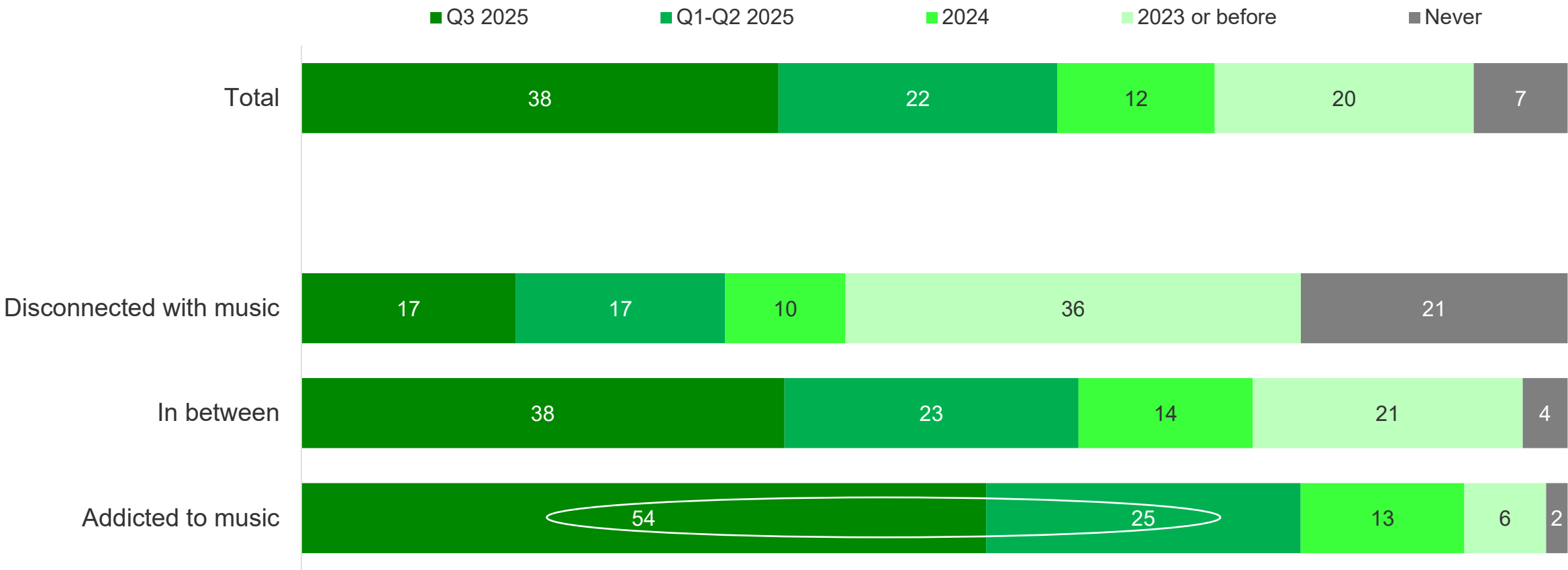
### Live Music Usage Habits





# In 2025 (Q1-Q3), four-fifths of „Addicted” participated in live music events

Participation in a Live Music Event Last Time  
(%)

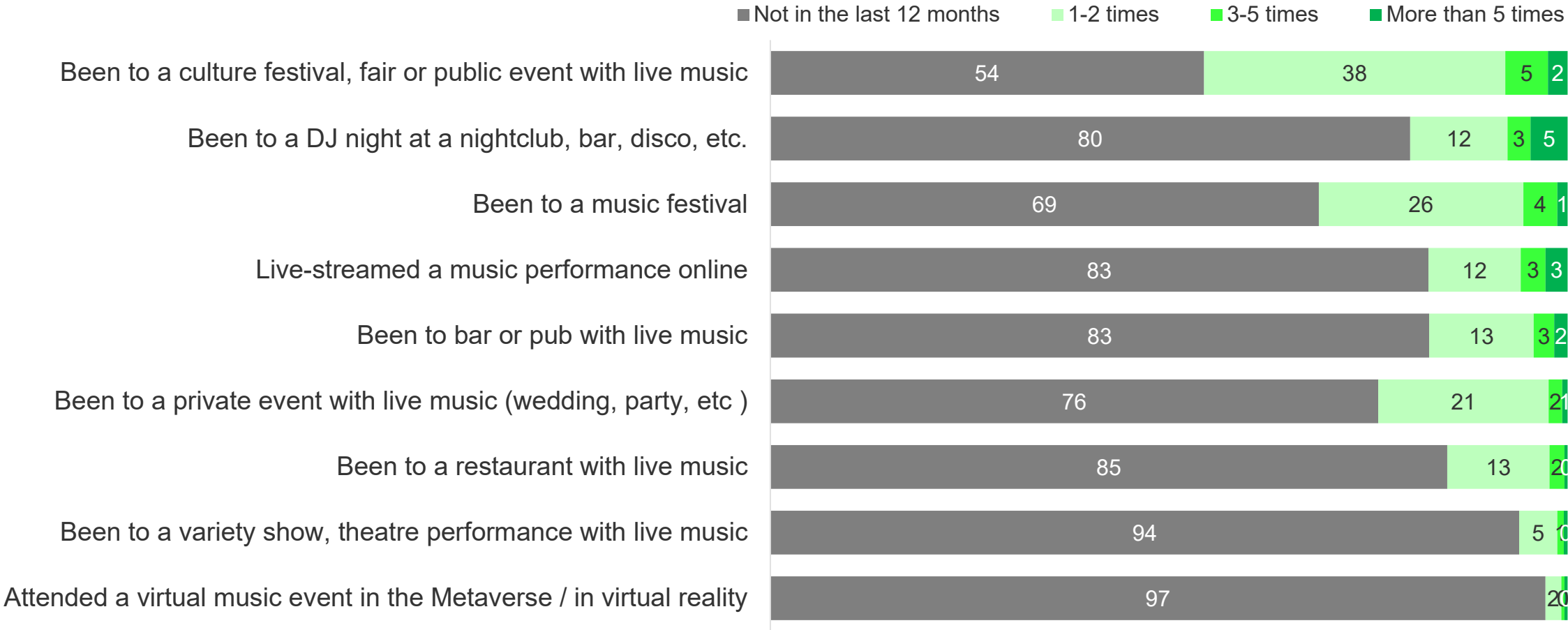




# Live music events are much more connected to festivals and bars than e.g. to restaurants

## Frequency of Attending Various Live Music Events in the Last 12 Months

(%)

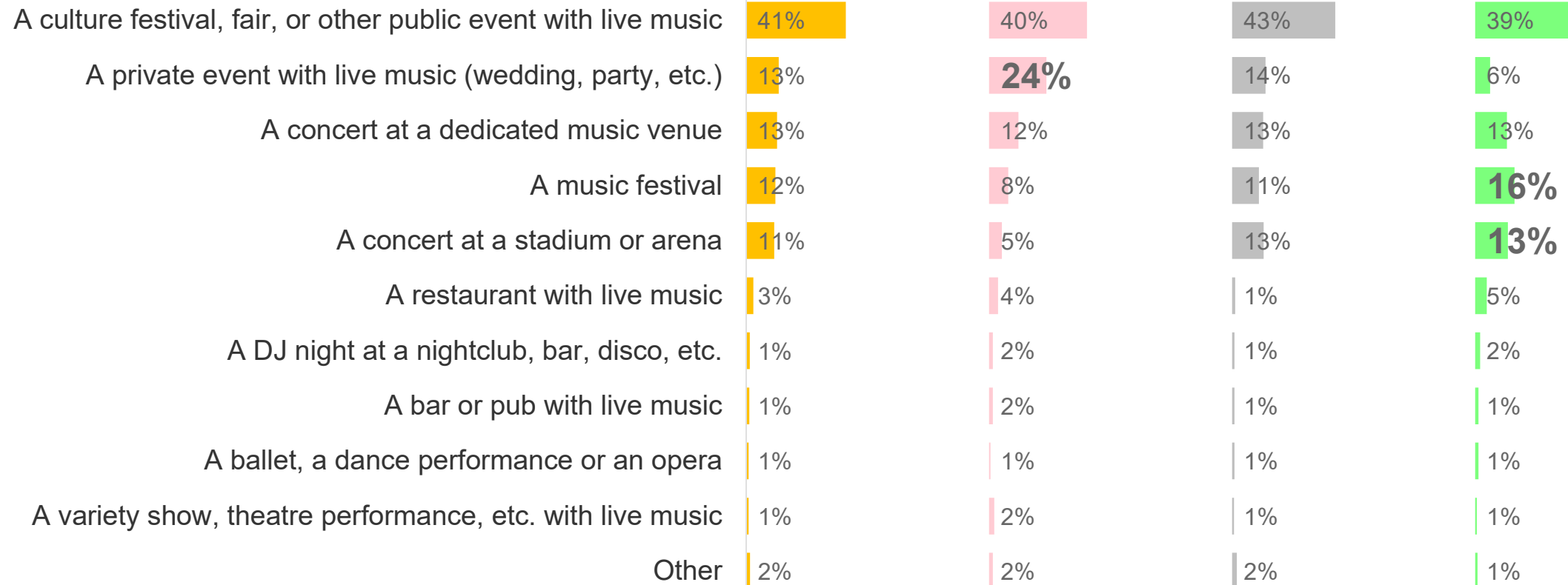




**Festivals are the main type of live music events. „Addicted” more prefer music festivals and big concerts than „Disconnected”, while the latter more prefer private events.**

### Live Music Type at the Last Event

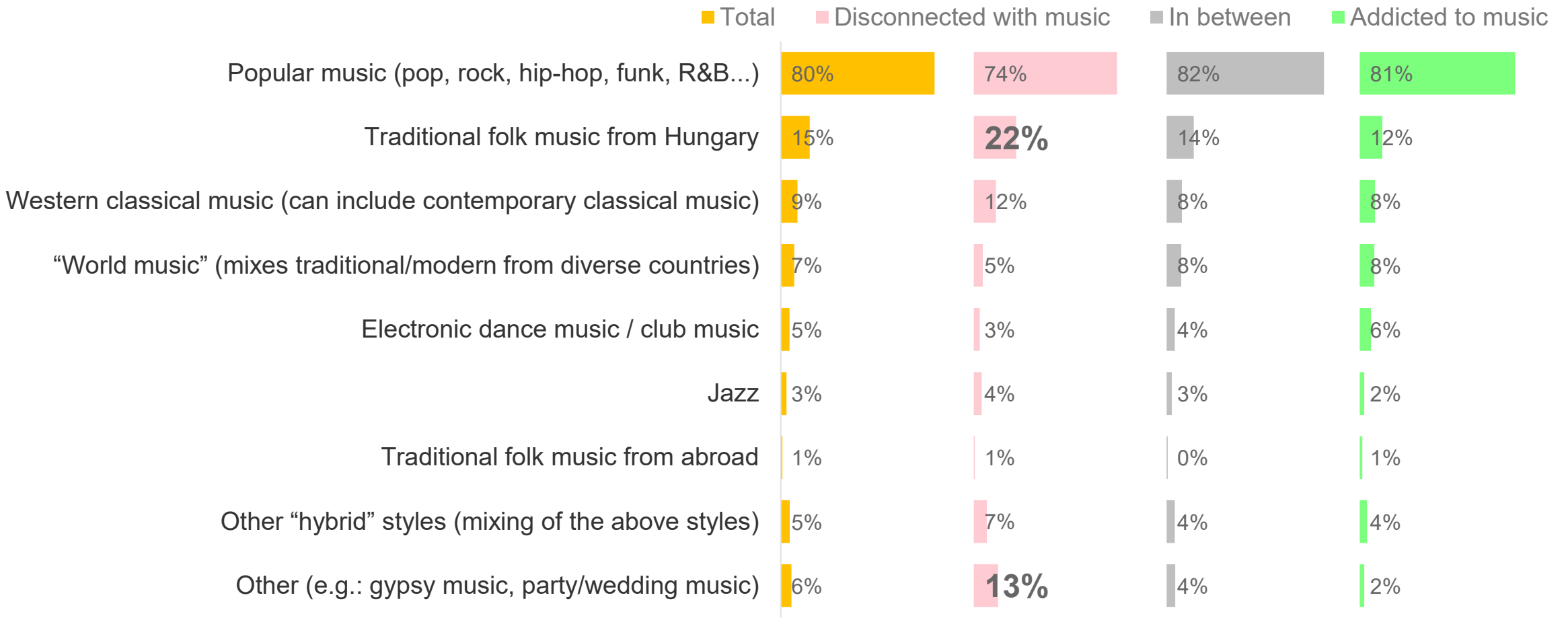
■ Total ■ Disconnected with music ■ In between ■ Addicted to music





The major style of live music events is popular music. „Disconnected” prefer Hungarian folk music as well as gypsy and party/wedding music to an above average extent.

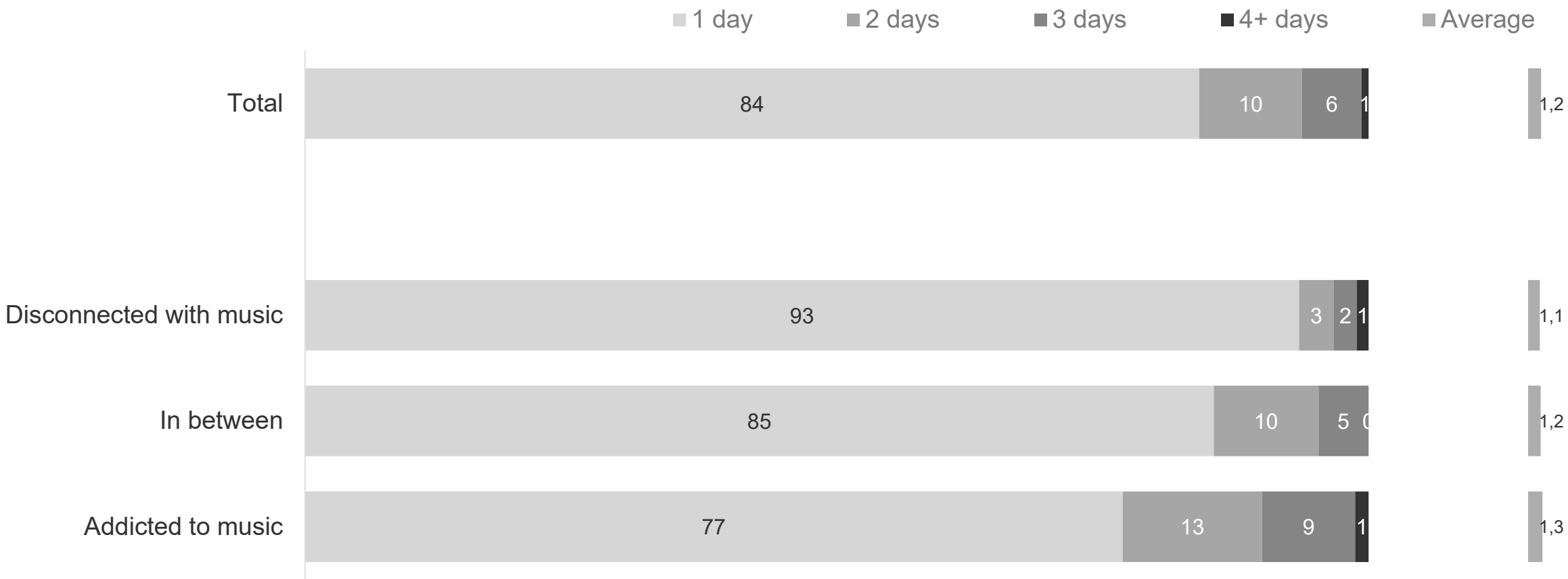
Live Music Styles at the Last Event





# The share of live music events with 2+ days are relatively moderate (17%)

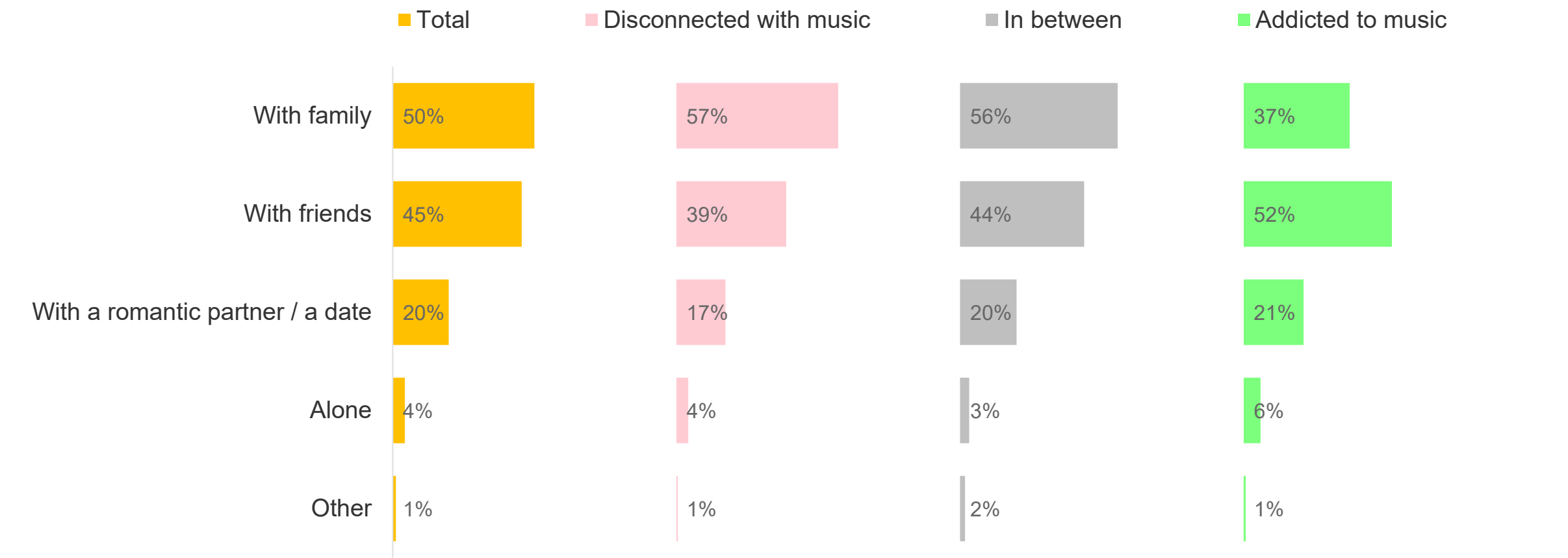
Number of Days in the Last Live Music Event  
(Distribution /%/ and Average)





Live music events are not single-person events. „Addicted” attend these events mostly with friends, while „Disconnected” mostly with the family.

Respondent's Company in the Last Live Music Event





## 4.3

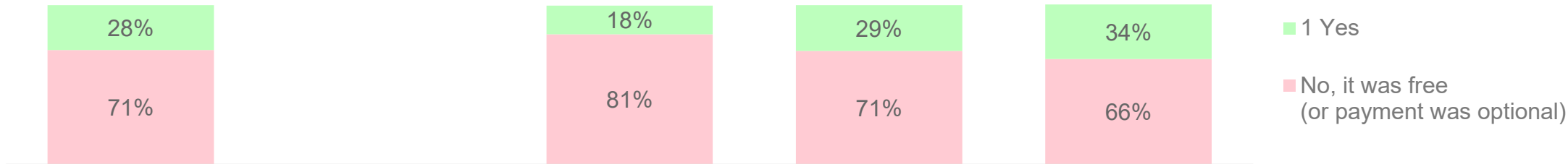
### Live-music Related Expenditures





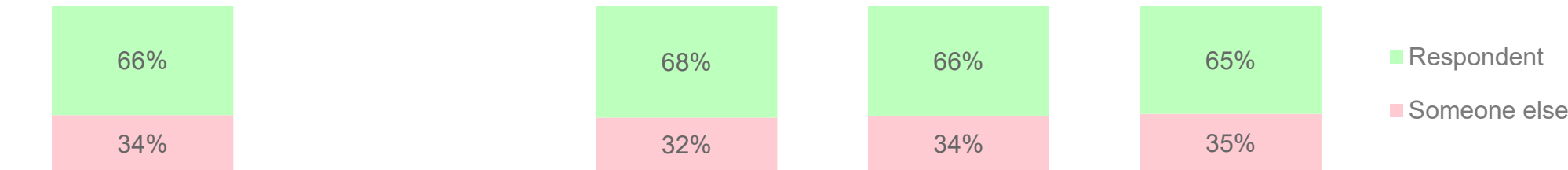
You don't have to buy any ticket in the majority of events where live music can be heard. If any ticket must be bought, its average price amounts to HUF 14 000.

Buying Tickets



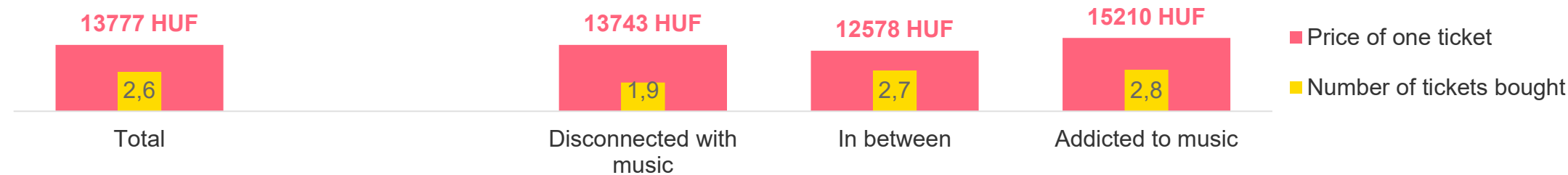
Base: Those ever participated in live music event Total n=887; Disconnected with music n=191; In between n=407; Addicted to music n=289

Ticket Buying Person



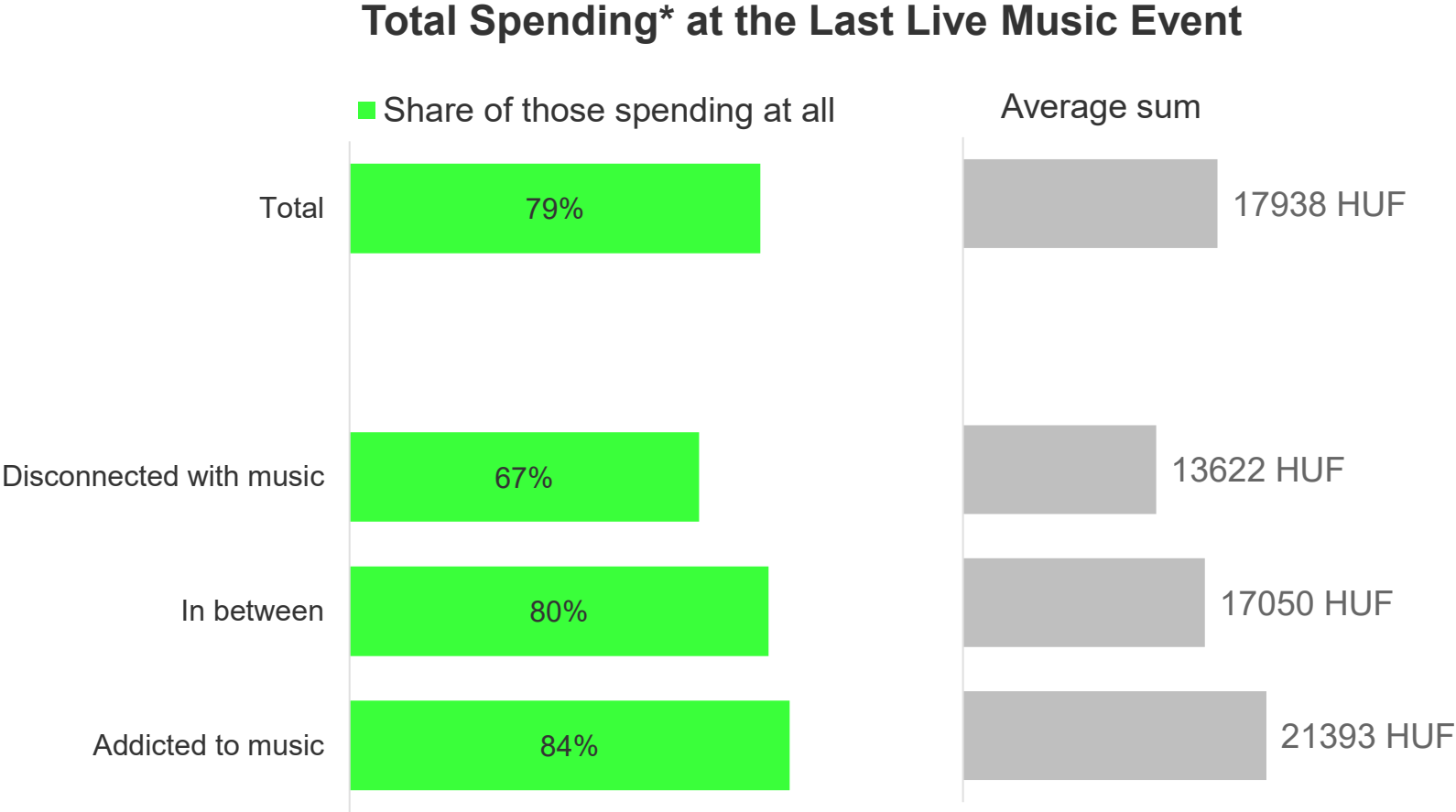
Base: Those buying ticket in the last live music event Total n=248; Disconnected with music n=34; In between n=116; Addicted to music n=98

Price and Number of the Tickets





On average, the total cost of a live music event amount to 18 000 HUF for those four-fifths who have any spending at such an event

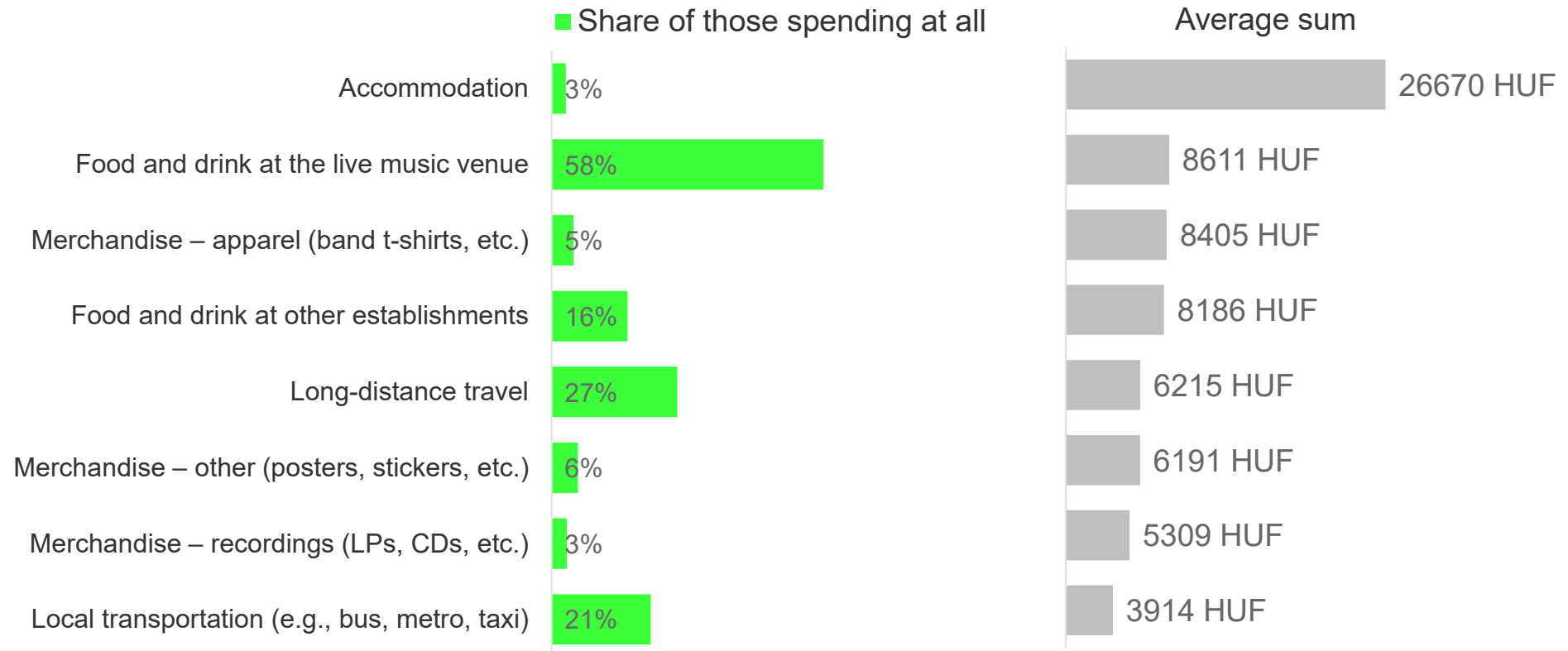


\* Ticket, local travel, long-distance travel, accommodation, food, drink, etc.



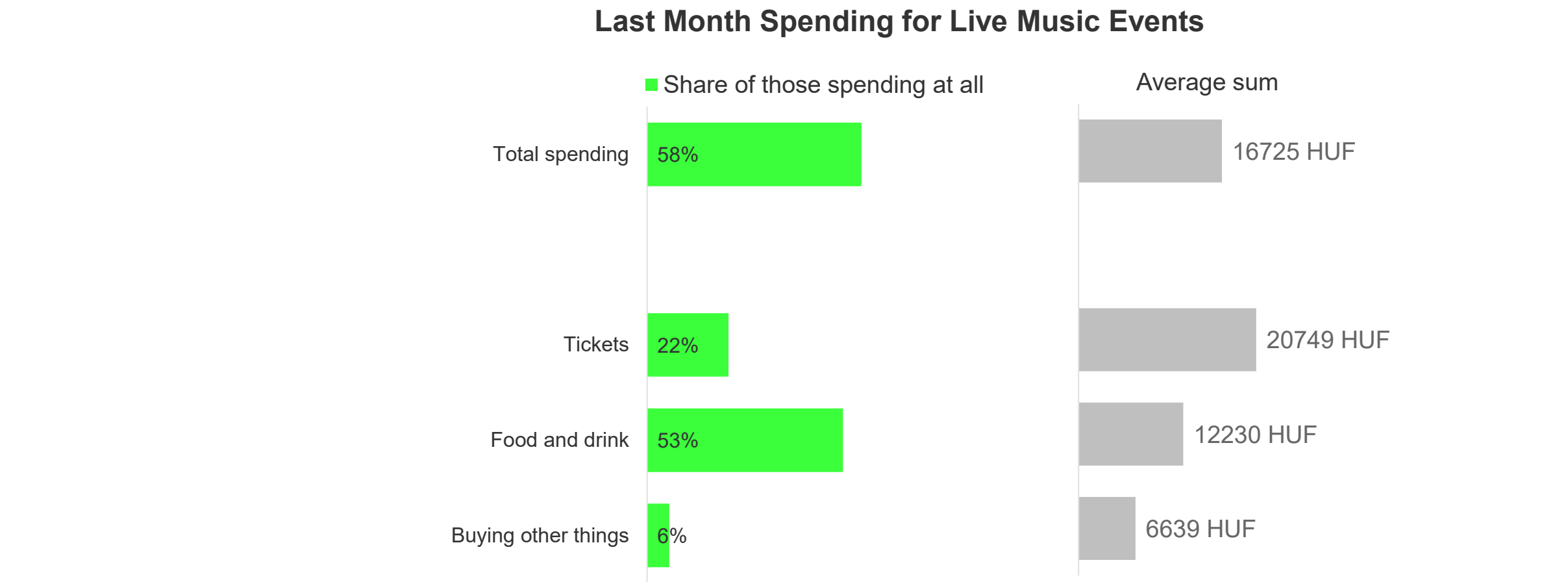
The most widespread cost of a live music event is connected to food/drink in the venue, while the most expensive one is accommodation

### Detailed Spending at the Last Live Music Event



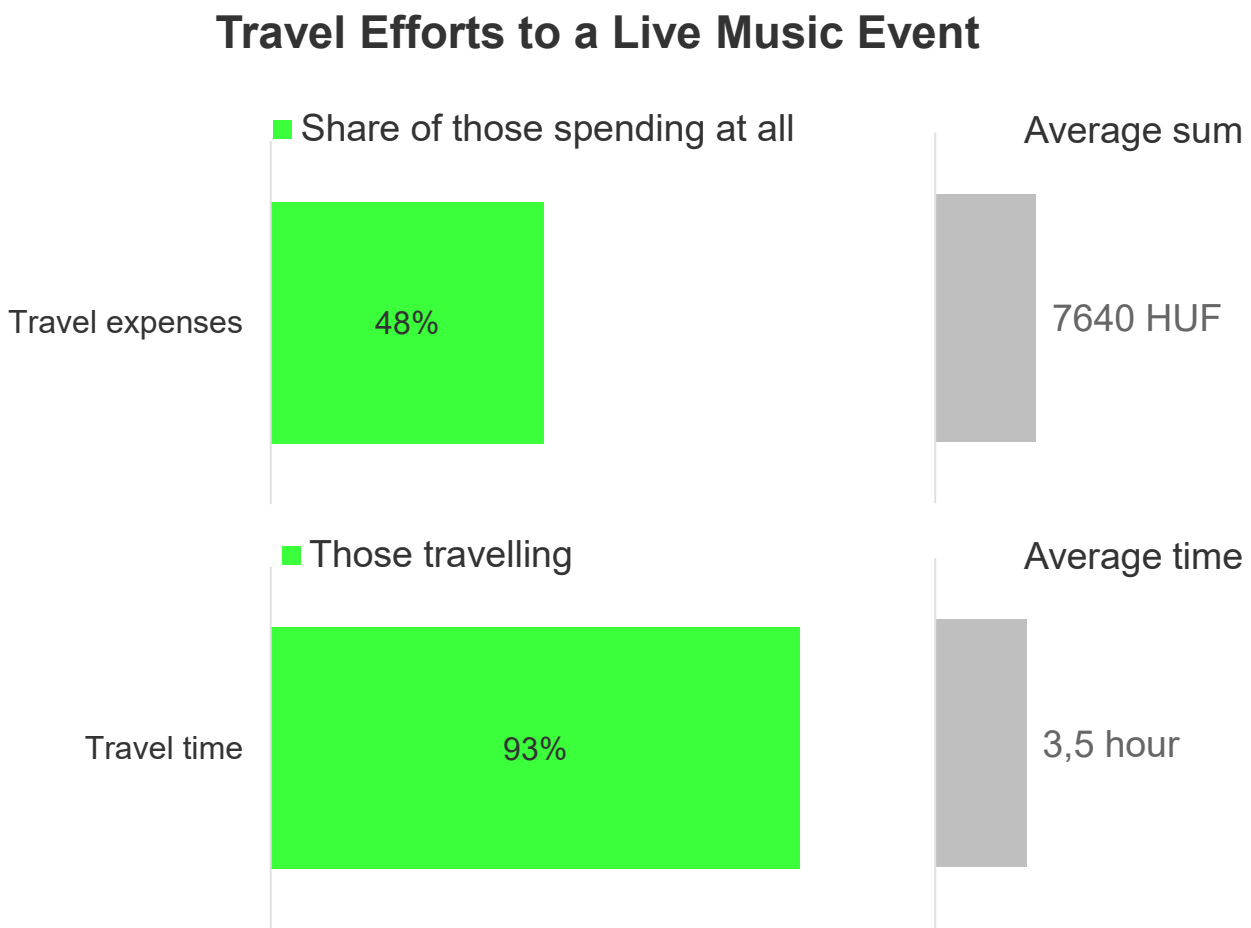


# Food/Drink are the most widespread cost item in a live music event





# Half of the attendants have travel expenses due to a live music event





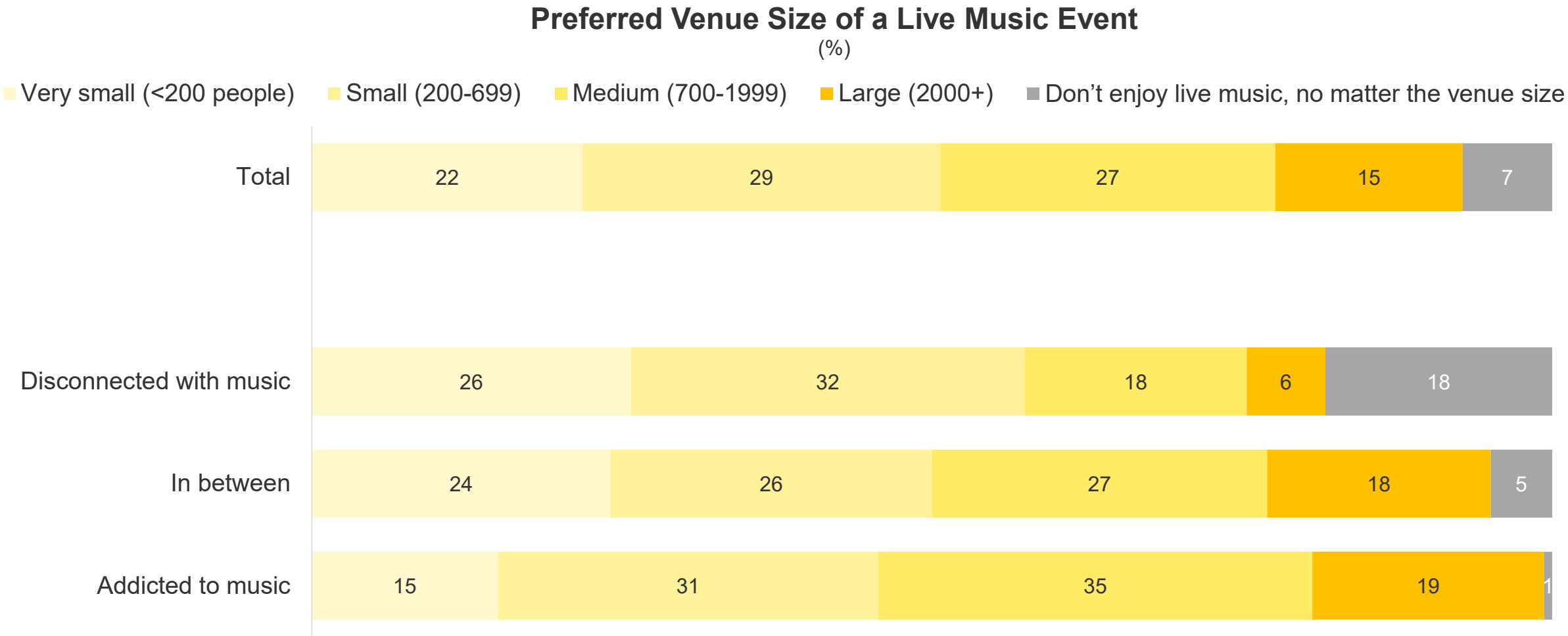
## 4.4

### Circumstances of Live Music Events





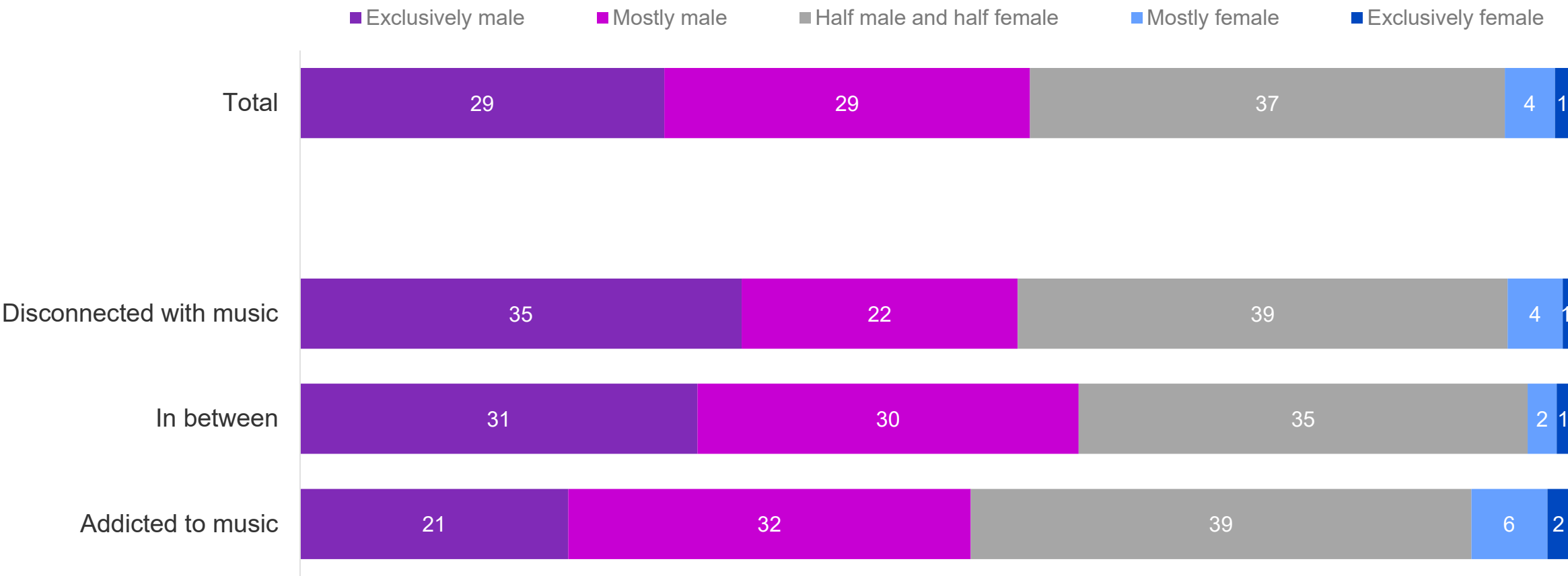
# The preferred venue sizes are varied, there is no exceptional preference for any size





# Male performers are more frequent in live music events, especially on the events attended by „Disconnected”

Gender of Performers in the Last Live Music Event (%)







# Foreign performers are relatively frequent on live music events attended by „Addicted”

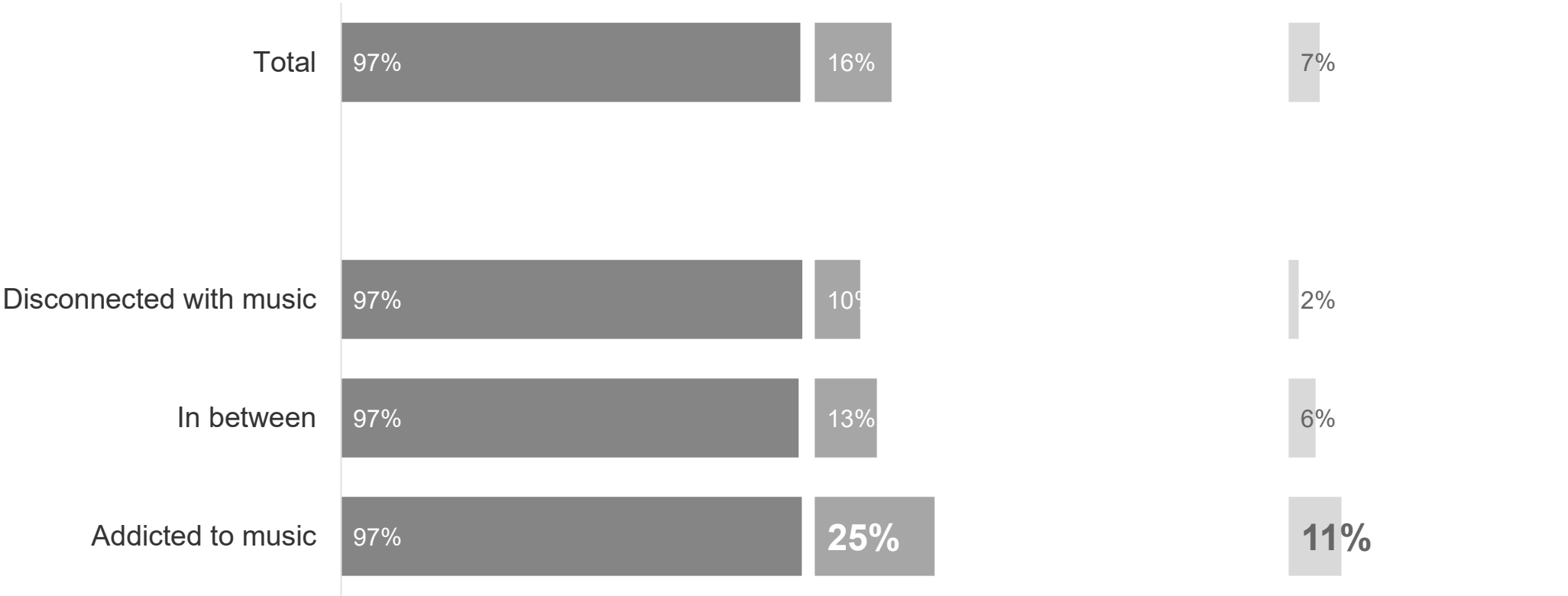
Origin of Performers in the Last Live Music Event

(%)

■ From Hungary

■ From Europe

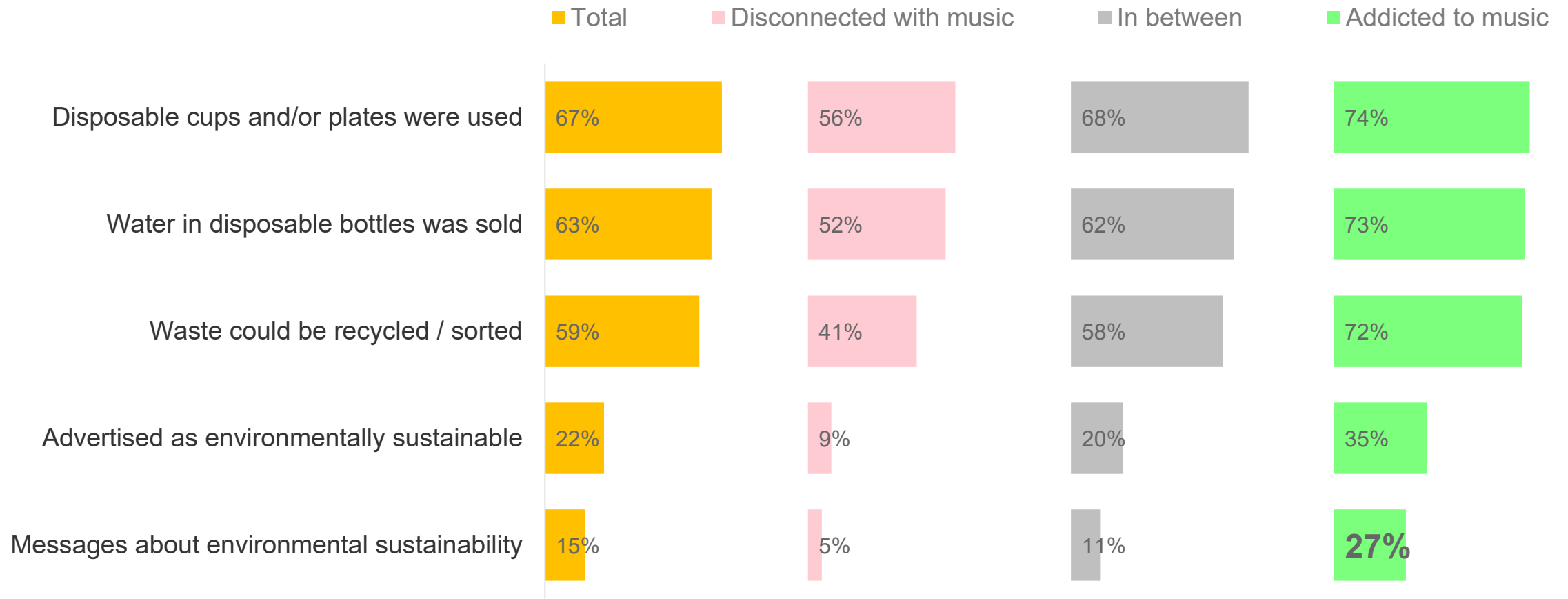
■ From outside Europe





## Messages about environmental sustainability of a live music event are relatively rare and are perceived mostly by „Addicted”

### Environmental Aspects of the Last Music Event



# 5

## Music Listening Habits

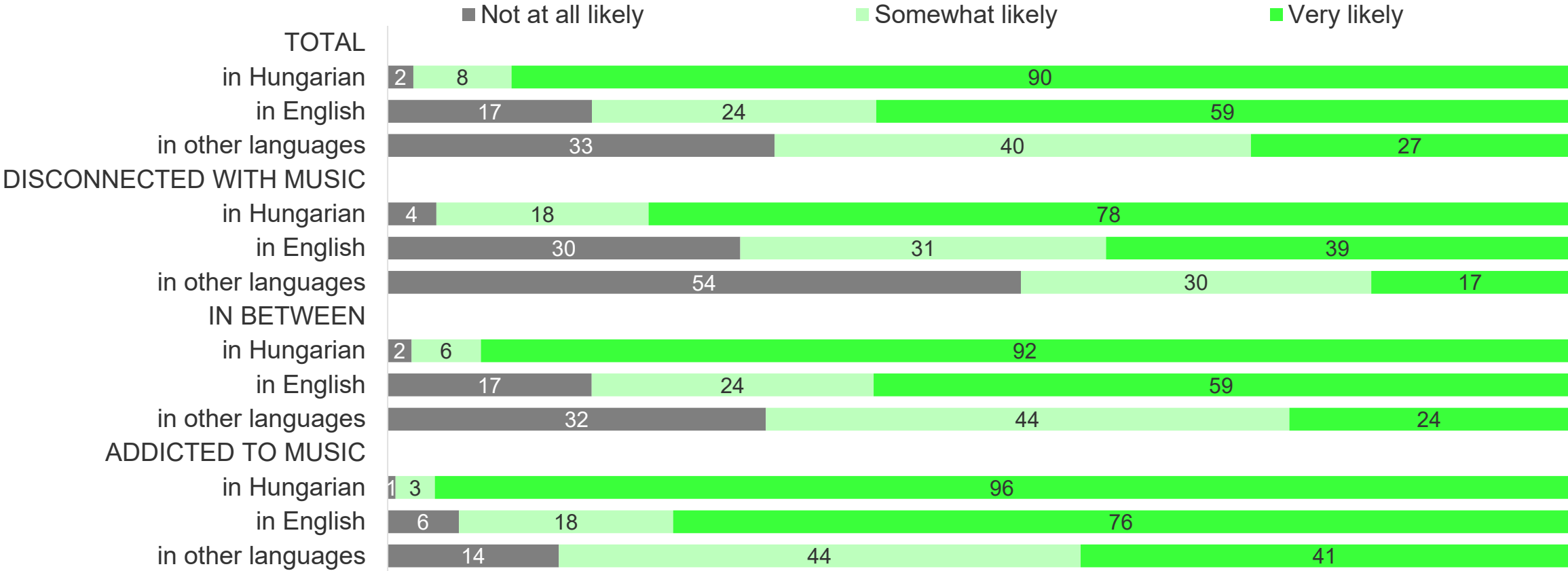






# Listening to music in foreign languages is rather likely

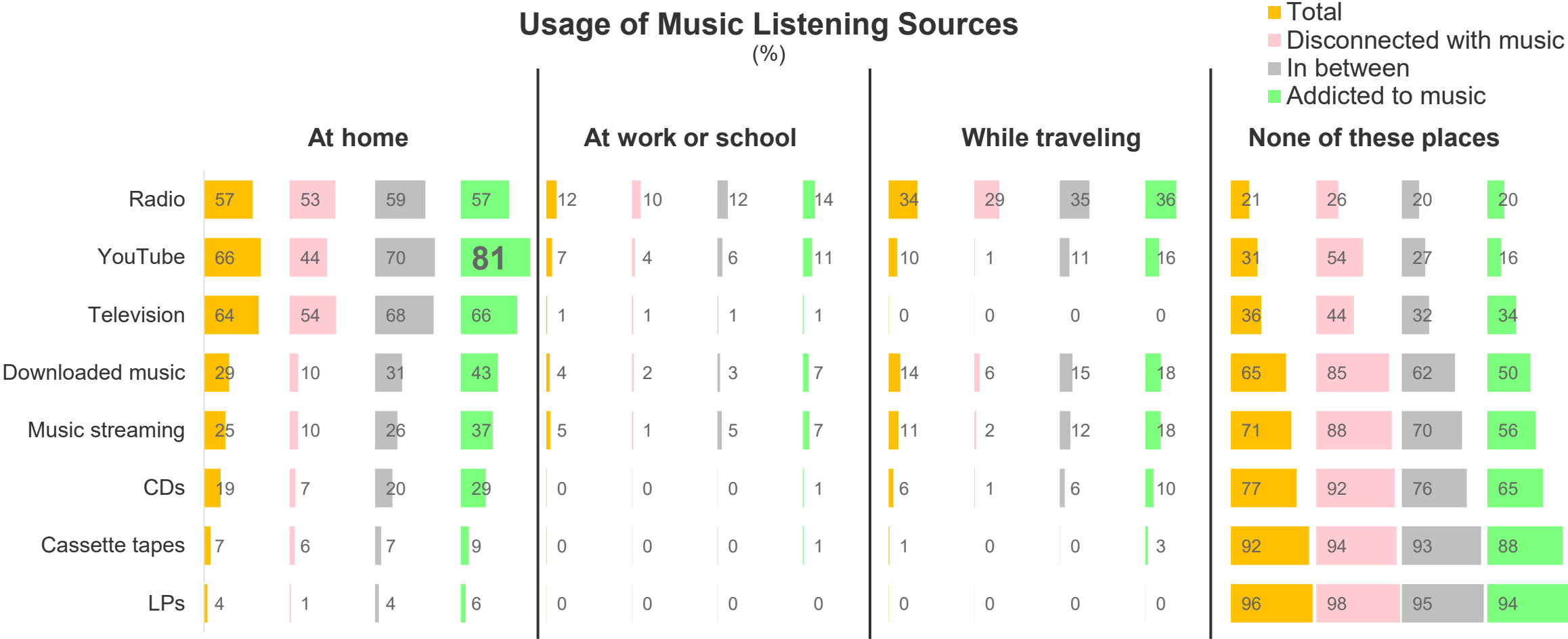
Likelihood of Listening to Music in Various Languages  
(%)





The main sources of music listening are the radio, YouTube and the TV but downloading and streaming are not negligible, either. Among „Addicted”, YouTube is dominant (at home). During travel, radio is the major source. There is hardly any music listening at work/school.

Usage of Music Listening Sources  
(%)





It is the radio where people listen to music the longest time. On Saturday, one listens to music only a little bit longer than in a working day. The duration of time is the lowest during travel. No difference among the attitude segments in duration of time (but yes in penetration).

Duration of Time of Listening to Music from Various Sources

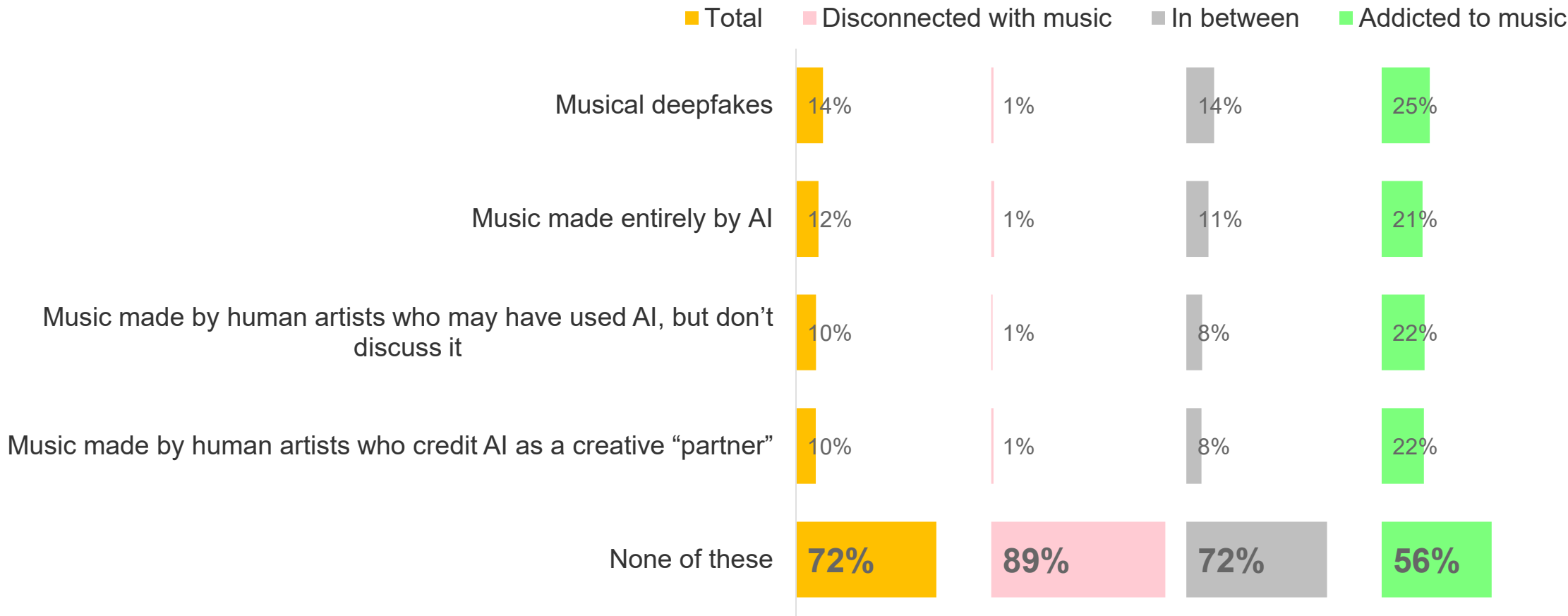
Total sample (Minutes) Segments – At home

Minutes	At home		At work or school		While traveling		Disconnected with music		In between		Addicted to music	
	Working day	Saturday	Working day	Saturday	Working day	Saturday	Working day	Saturday	Working day	Saturday	Working day	Saturday
Radio	96	106	198	165	44	49	96	105	89	103	107	110
Music streaming	78	77	88	116	49	54			78		76	
Television	76	85					82	93	69	78	84	91
YouTube	59	62	94	114	47	45	46	54	53	57	71	71
Downloaded music	50	56	77		38	45						
CDs	40	43			34	46						
Cassette tapes	34	50	Few valid responses						Few valid responses			
LPs												



# The penetration or recognition of AI-related music is at a moderate level (28% in Total, 44% among „Addicted”)

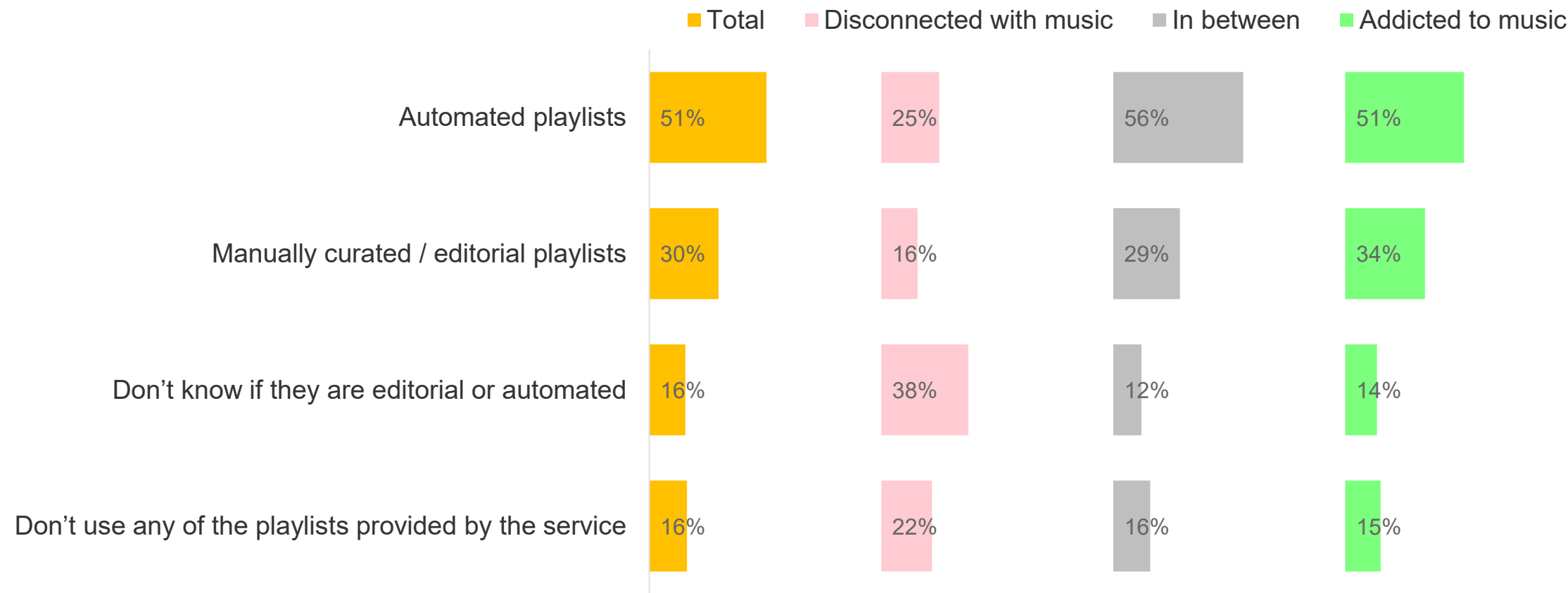
## Ever Listening to Music Made by Using AI





# Users of streaming services prefer automated playlist to the manual ones

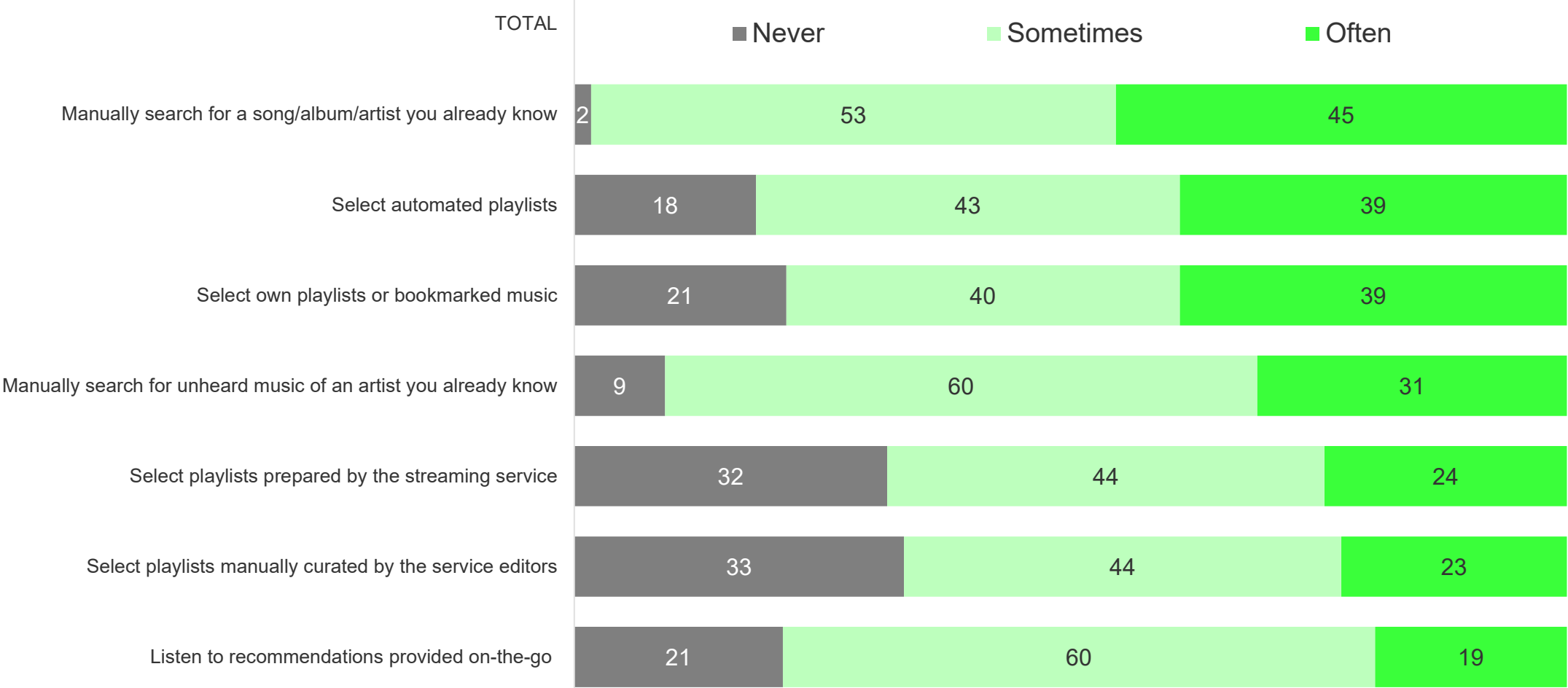
Using Playlists during a Usual Week





# Out of streaming users, practically everybody uses manual search for a song/album/artist he/she already knows

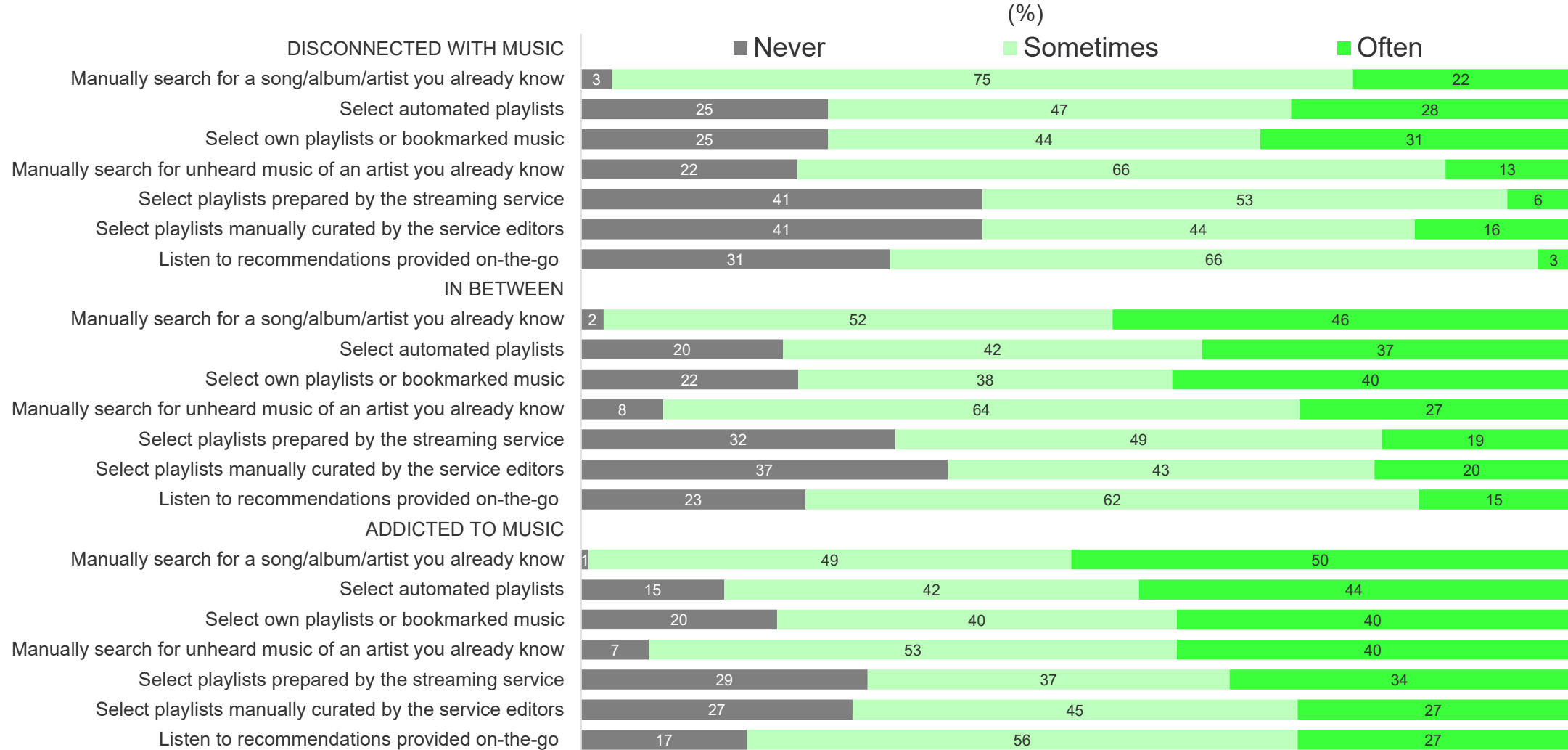
Frequency of Music Searching Activities during a Usual Week (%)





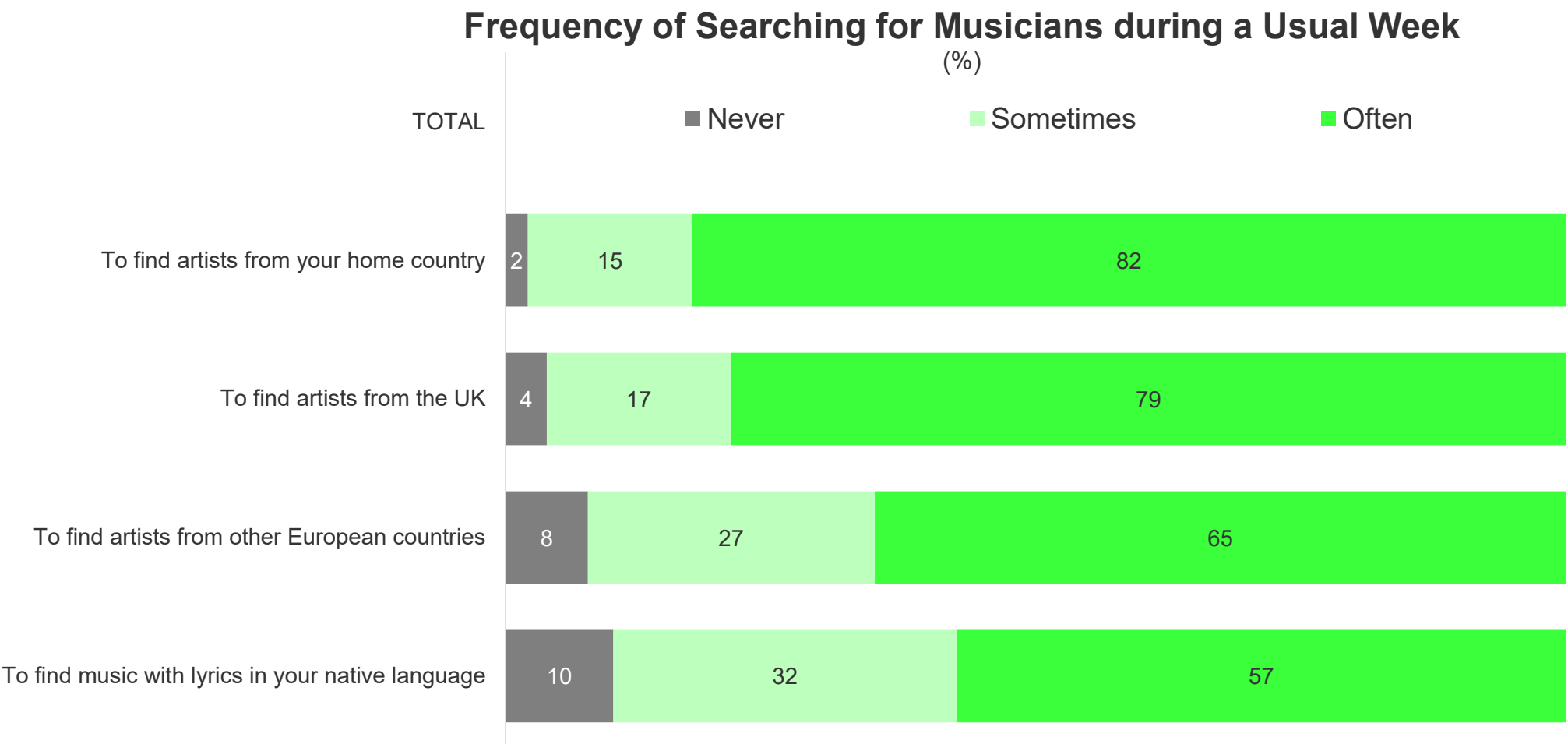
# From streaming users, even „Disconnected” sometimes use a number of searching opportunities

## Frequency of Music Searching Activities during a Usual Week by Segment



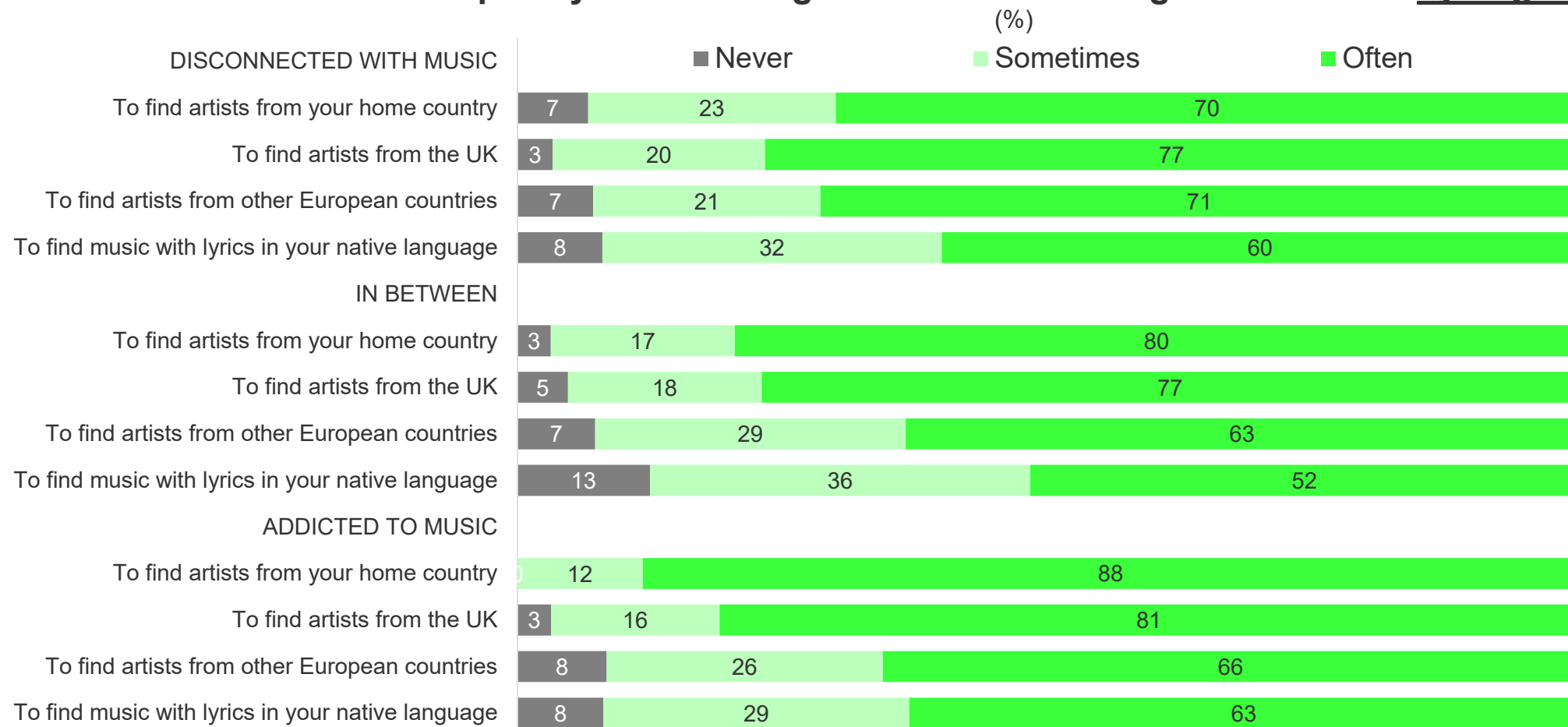


# Using streaming services, almost everybody search for Hungarian (and also UK) music artists



## There are relatively small differences among „Addicted” and „Disconnected” in how they search for Hungarian and foreign music artists

### Frequency of Searching for Musicians during a Usual Week by Segment





# Satisfaction with automatic music recommendation is high only among „Addicted”

## Satisfaction with automated music recommendations received in the streaming service

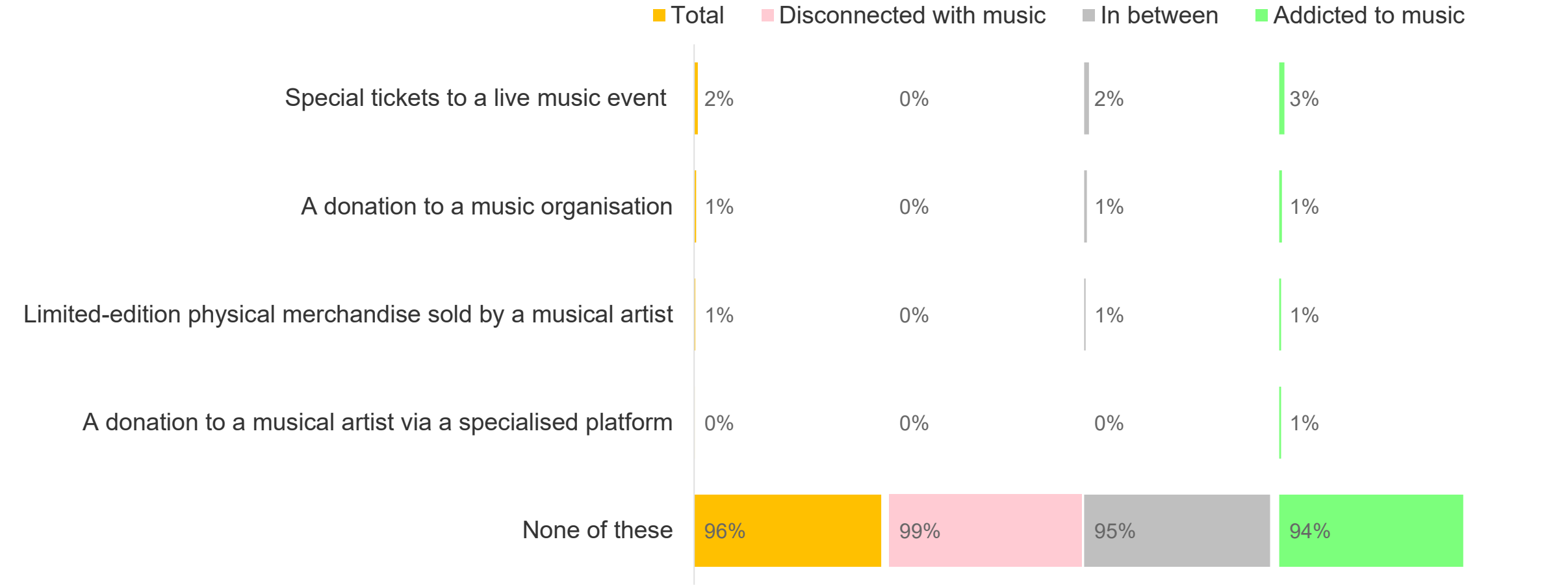
(Distribution /%/ and Average)





# Spending on special music-related activities is negligible in Hungary

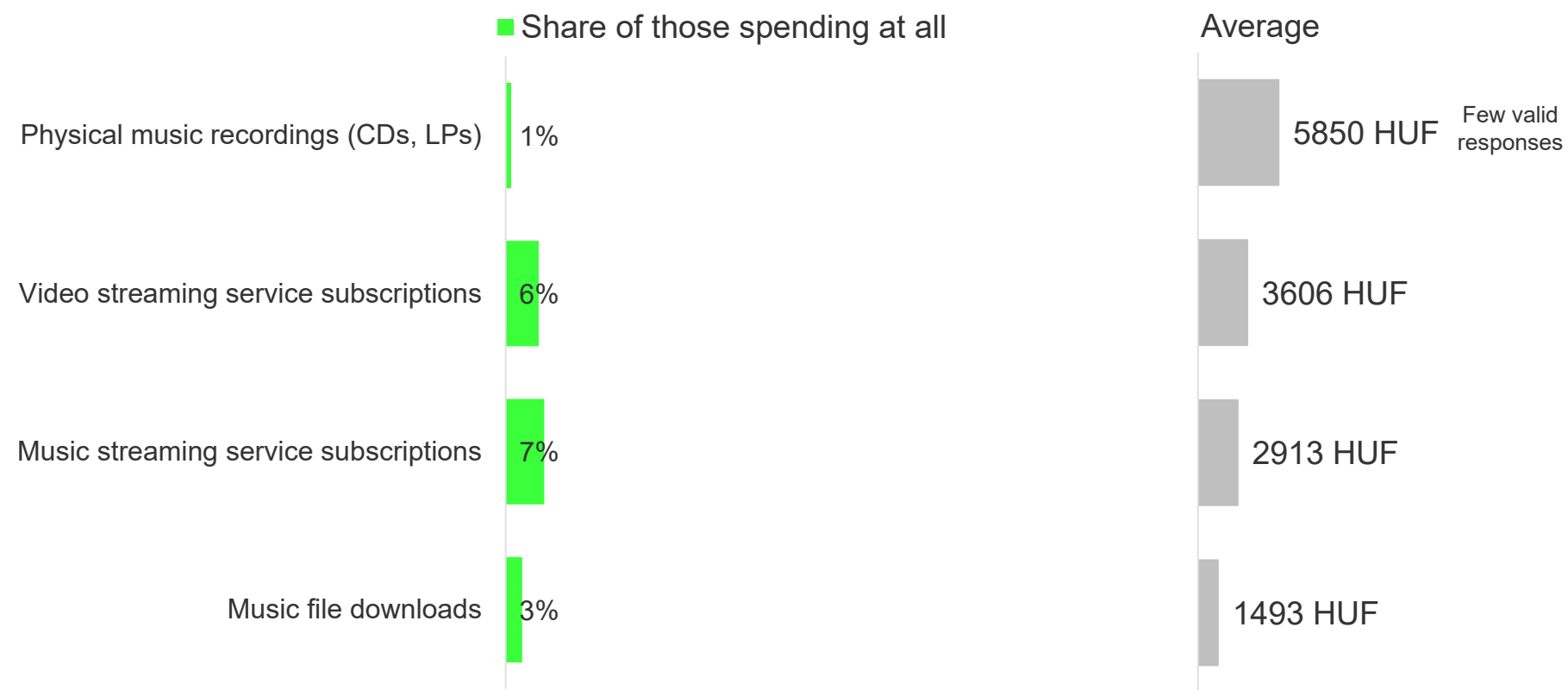
## Special Music-related Expenditures in the last 12 Months





# Spending on special music-related products/services is very small, both in penetration and in the sum of money

## Spending on Special Music-related Products/Services Last Month



## 6 Background Music

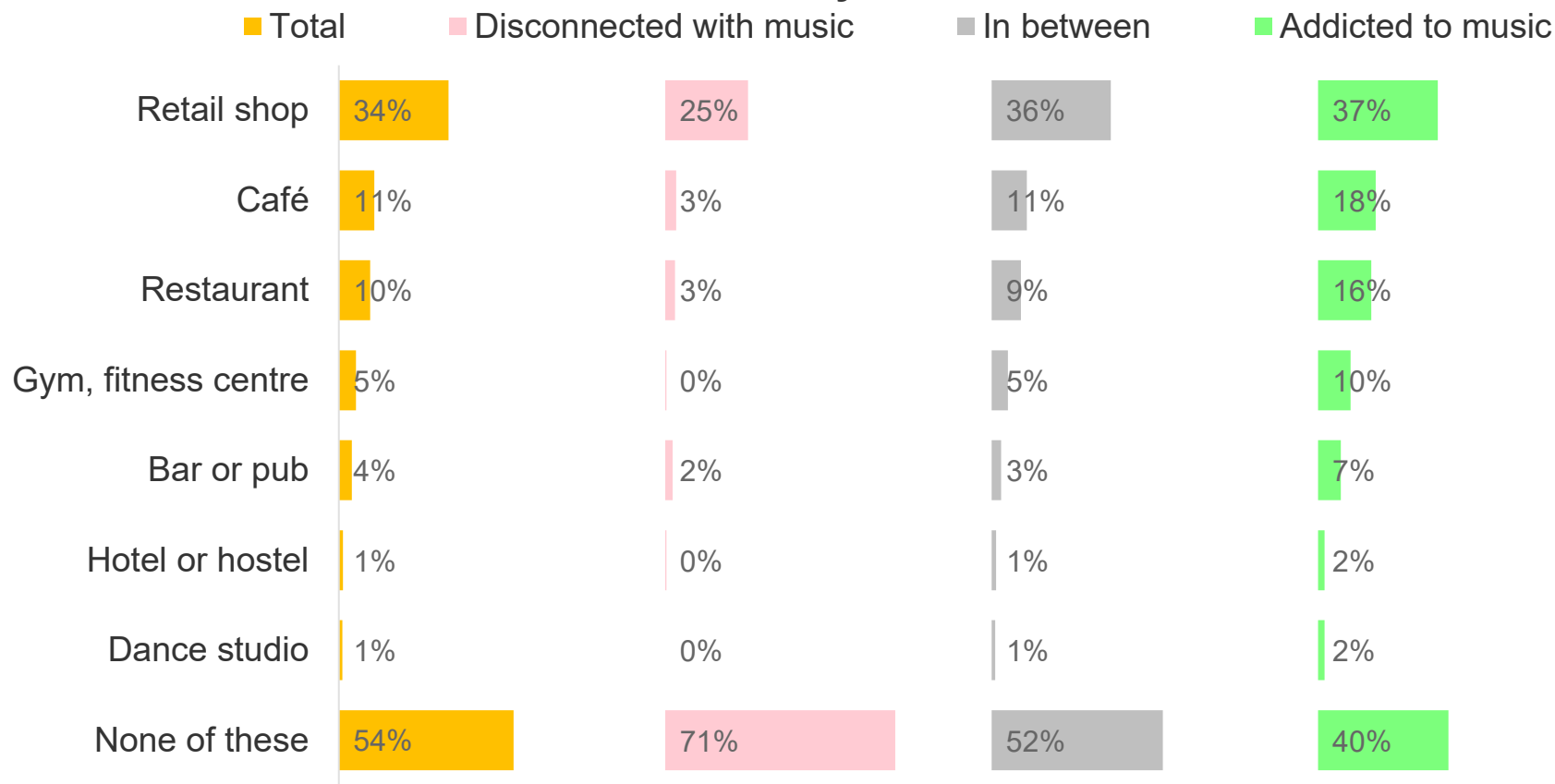






# People meet background music most frequently in retail shops. „Addicted” recognise background music more often than „Disconnected”.

Attending Places in the last 7 Days, where Background Music was Played

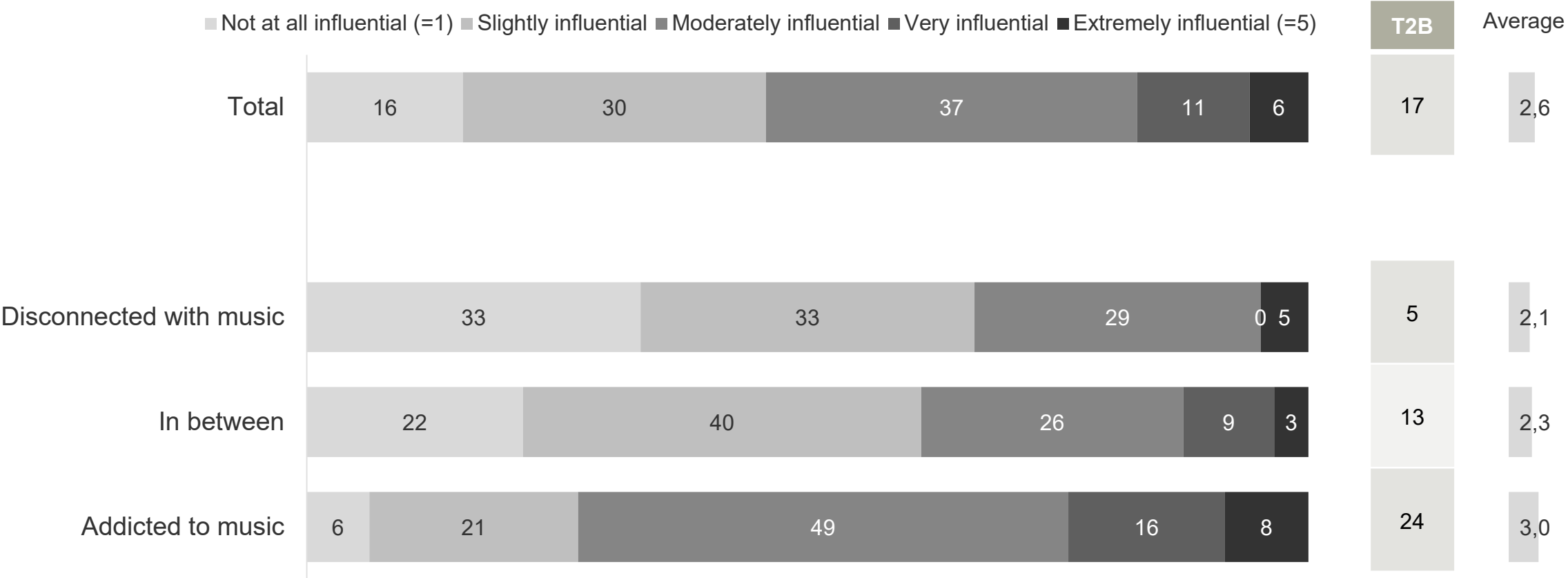


Hours	Duration of time spent there in the last 7 days
Retail shop	4,2
Café	3,0
Restaurant	3,2
Gym, fitness centre	4,0
Bar or pub	3,1
Hotel or hostel	Few valid responses
Dance studio	Few valid responses



# The quality of background music is a non-negligible influential factor whether to return or not to a restaurant/café/pub, especially among „Addicted”

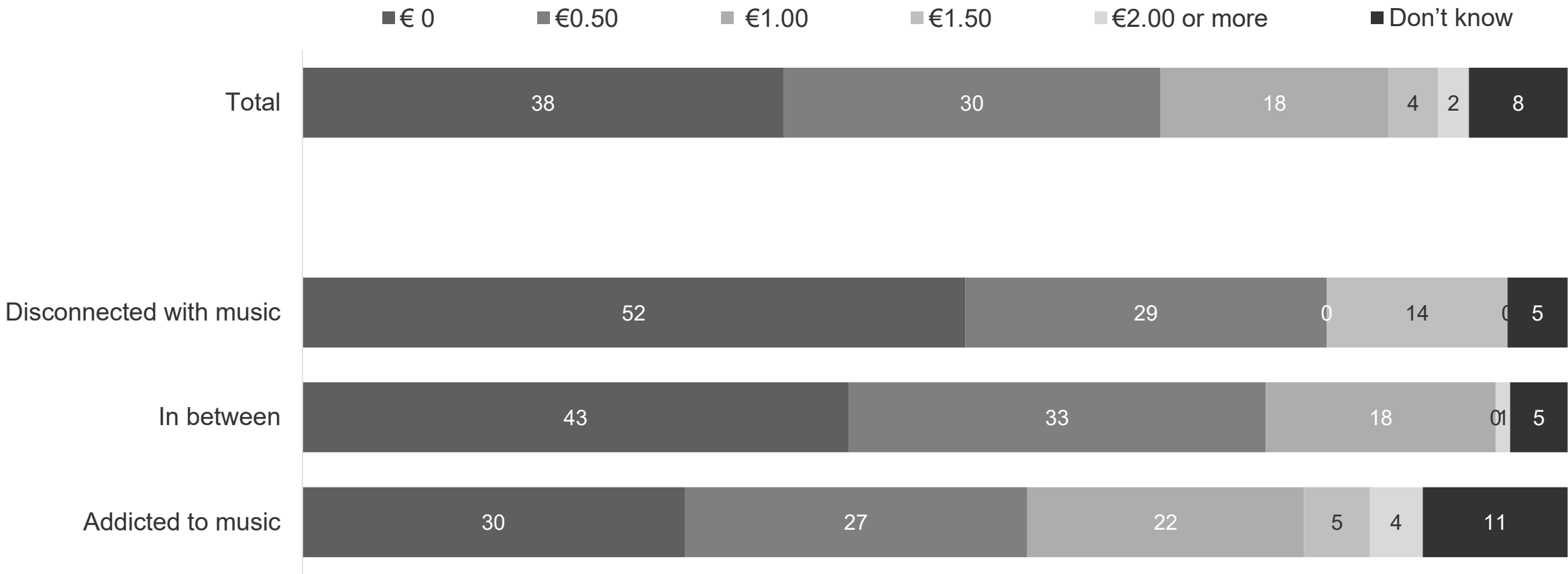
Impact of the Quality of Background Music for the Return to the Restaurant/Café/Pub  
(Distribution /%/ and Average)





# Willingness to pay more for good background music is relatively limited even among „Addicted”

Willingness to Pay More for a Drink for the sake of Pleasant Background Music (%)



7

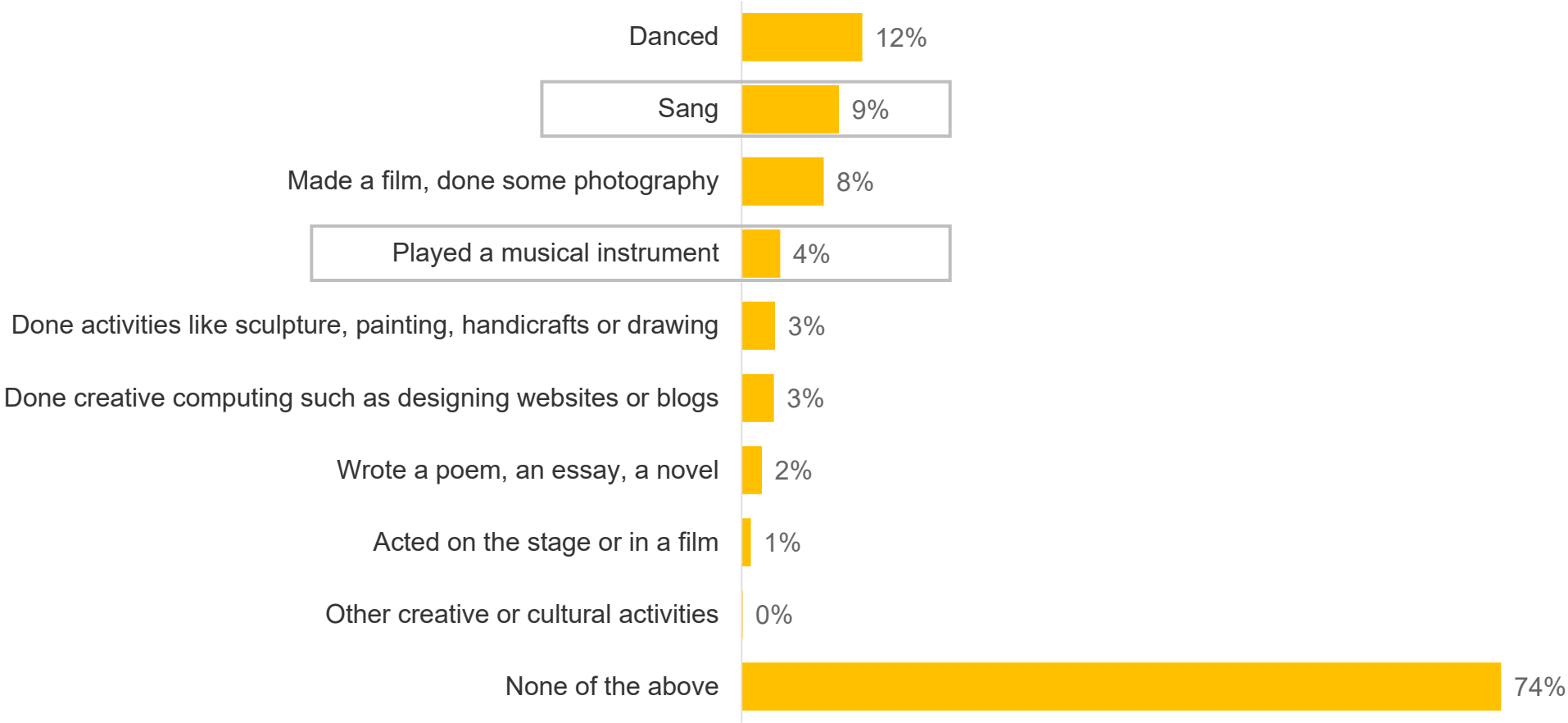
## Professional Musicians





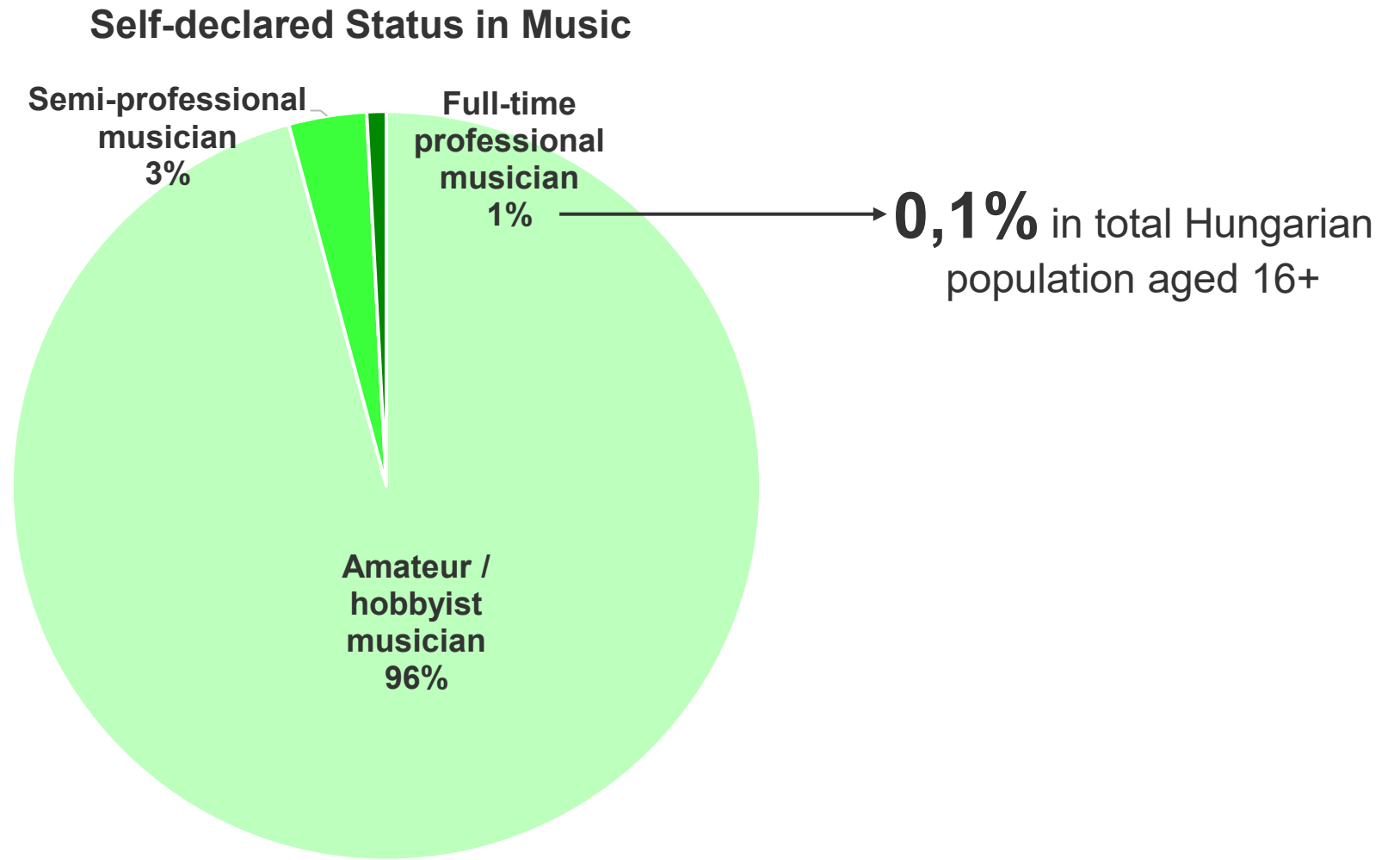
A fourth of the target group are involved in creative cultural activities. The share of music related activities is relatively low.

Penetration of Creative Cultural Activities in the Last 12 Months





The share of professional and semi-professional musicians in the sample (in the population) is low

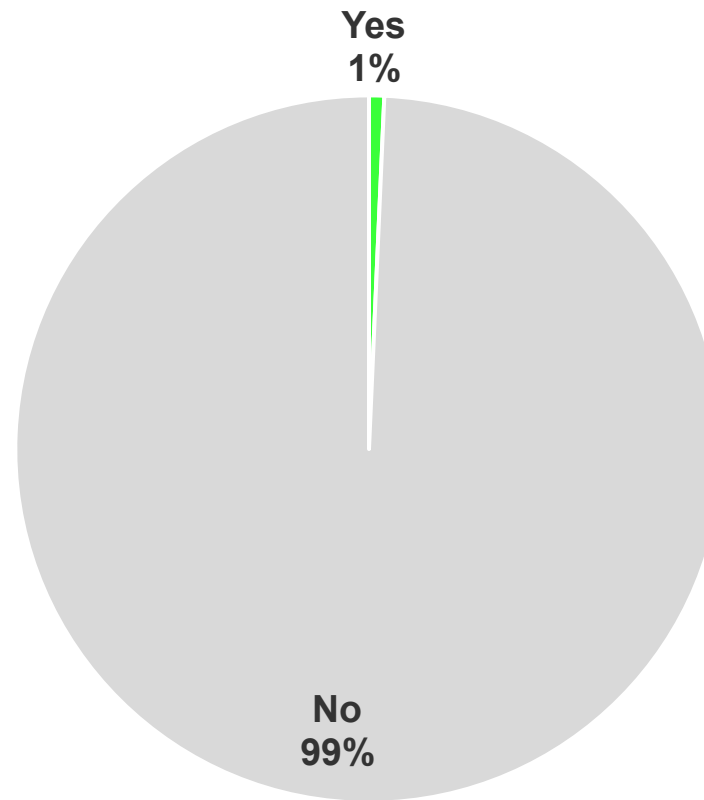






## The share of those receiving any income from music is negligible within the Hungarian population (16+)

### Income from Music-related Activities in the last 12 Months

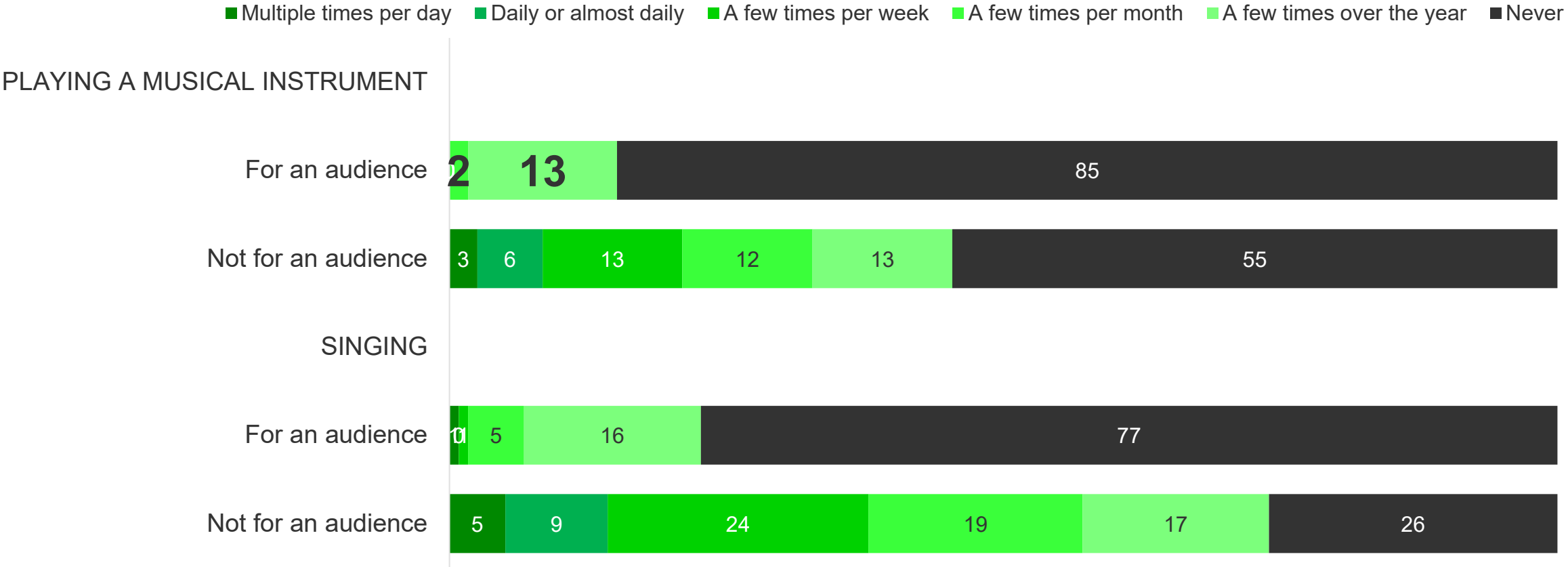






The share of those, playing a musical instrument for audience amount to 15% among those singing or playing music, which account for 1,8% in the total population aged 16+

Musicians' Activities in the last 12 Months  
(%)





## Recording of own music is negligible

### Recording Own Music in the last 12 Months among those Singing / Playing Music (%)





## The intention of non-professional musicians to become professional is rather weak

### Intention to Pursue Music as Main/ Only Occupation (%)

■ Definitely not

■ Probably not

■ Probably, yes

■ Definitely, yes

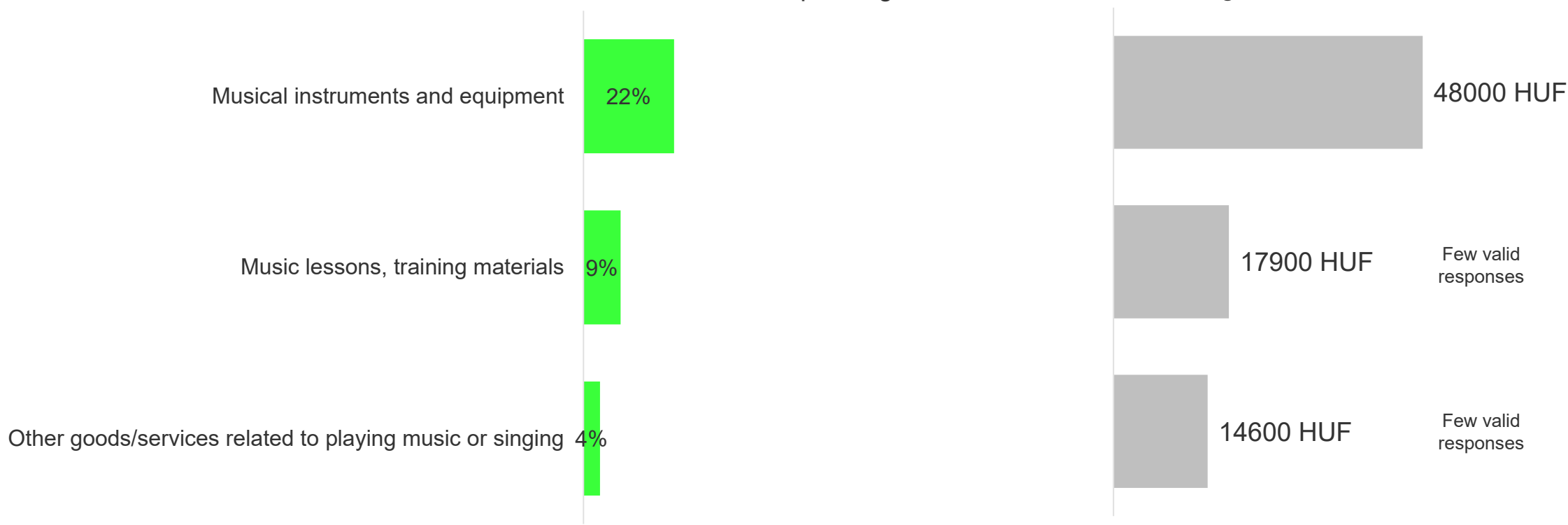




Among musicians, spending on equipment and training is low in both penetration and the sum spent for this

Spending on Music-related Products/Services in a Year

■ Share of those spending at all

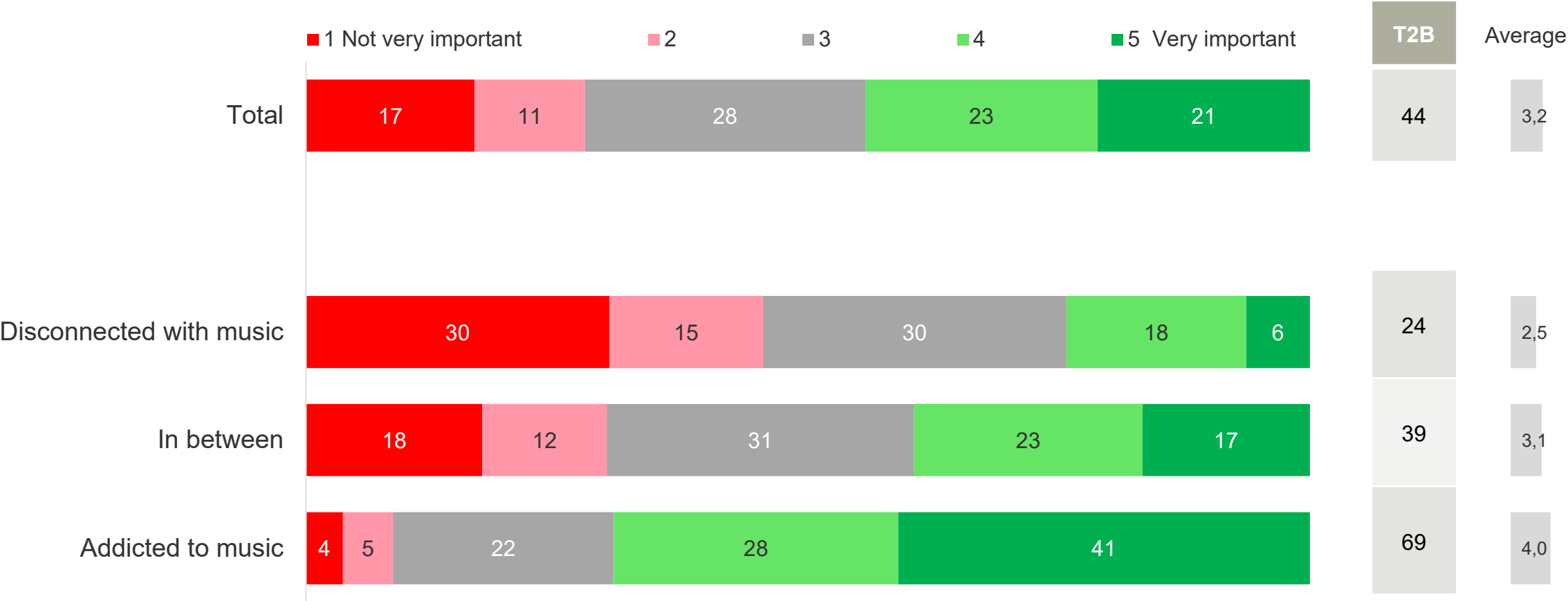




# Nearly half of the population think that musical artist should receive compensation if their music is used by AI

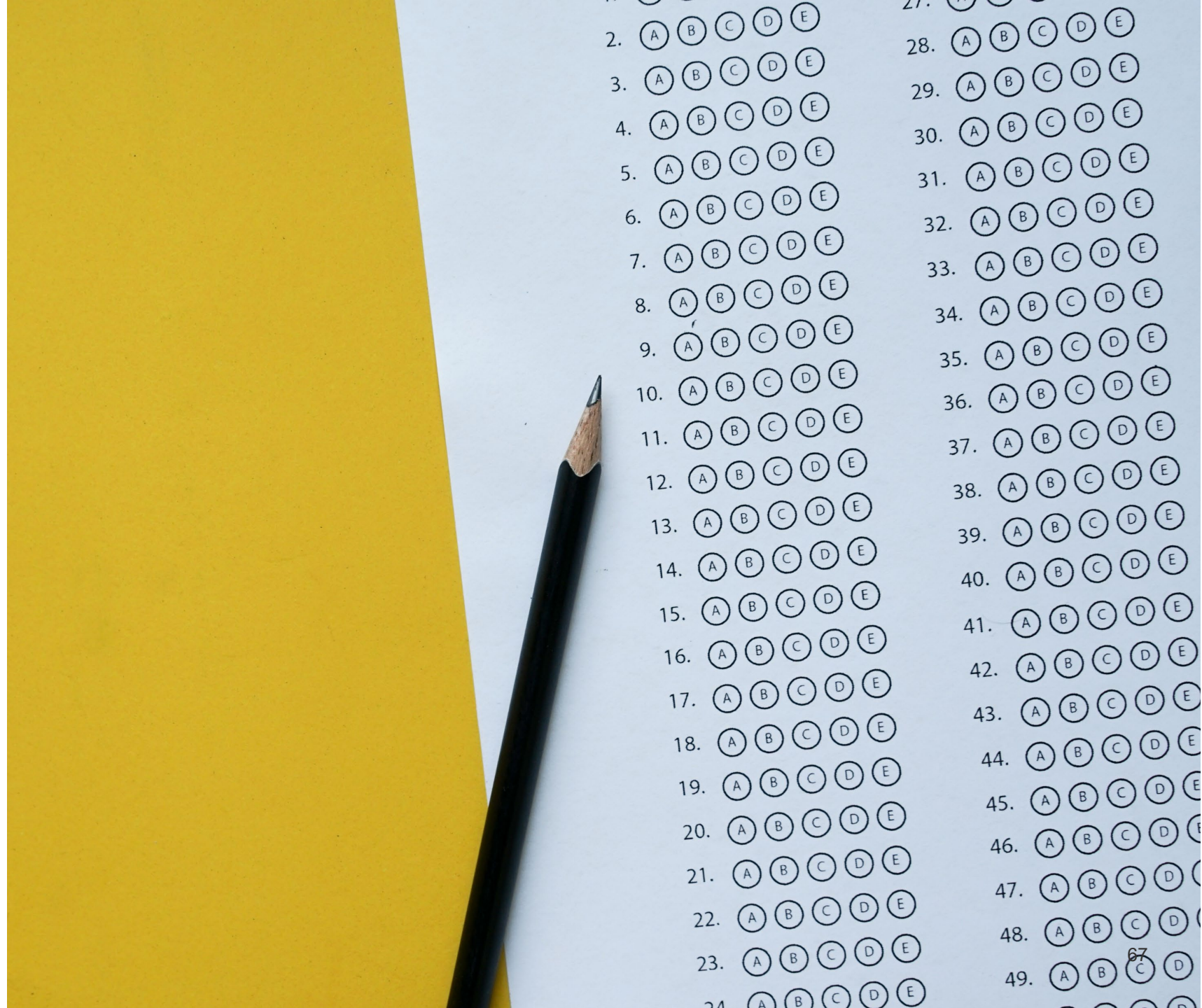
## Importance of Compensating Musical Artists when their Music is Used to Train AI

(Distribution /%/ and Average)



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## Research Background



The Client received support from EU with respect to project OpenMusE Nr.101095295, and this report was conducted on the basis of this.

Project number: **101095295;**

Project name: **OpenMusE;**



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## Methodology

- Population aged 16+
  - representative by gender, age, settlement type and region according to the latest Hungarian Census (2022)
- Sample size: N=1012
- F2F CAPI (Tablet)
- FW and analysis conducted by Kantar Hoffmann
- Questionnaire received by Kantar Hoffmann from Teil der INTEGRAL-SINUS-OPINION Gruppe
- FW period: 30.07.2025 – 17.09.2025
- Average interview length: 27 minutes
- No need of any weighting of the data file before the analysis,
  - as Census Quotas for age, gender, region and settlement size/type were observed punctually during the FW

The sample is representative for the Hungarian population aged 16+ by gender, age, settlement type and region

%	Total sample
<b>GENDER</b>	
Male	47
Female	53
<b>AGE</b>	
16-29	18
30-39	16
40-49	19
50-64	23
65+	24
<b>EDUCATION</b>	
ISCED 1	0
ISCED 2	20
ISCED 3	61
ISCED 4	3
ISCED 5	1
ISCED 6	9
ISCED 7	5
ISCED 8	0

%	Total sample
<b>FAMILY STATUS</b>	
Married or remarried	47
Single living with a partner	13
Single	20
Divorced or separated	11
Widower	9
<b>SETTLEMENT TYPE</b>	
Budapest	18
County center	21
Other town	32
Village	28
<b>REGION</b>	
Middle Hungary	25
East Hungary	54
West Hungary	21
<b>FINANCIAL DIFFICULTIES</b>	
Most time or occasionally	16
Almost never / never	84

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**Appendix**  
**Folk/World music**





**Folk/World music have a basically positive impression about the cultural group in question. Information materials are relatively rare.**

**Details about Folk and World music in the Last Live Music Event**

