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A COMPREHENSIVE STUDY OF THE POLISH MUSIC MARKET

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Ministry of Culture and National Heritage of the Republic of Poland

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The music market in Poland – most important conclusions

The report consists of seven thematically connected parts. Part one contains a description of the recorded music, music publishing and synchronisation market in 2016–18. Chapter two outlines the most popular artists in Poland broken down by the sources of their popularity. Chapter three presents the first comprehensive description of the concert market in Poland. Part four estimates the export value of Polish music and discusses the most important export directions. Chapter five describes the musical preferences of Poles, chapter six the institutional support for the music industry, and chapter seven the educational offer addressed to musicians in Poland.

Data collected in the report is shown in the form of rankings, most often comprising 25 key elements of the given set. Based on the experience and practice of the music industry (e.g. Billboard[1] charts: *200*, *Hot 100*, *Artist 100*, the Polish Official Retail Sales Chart – OLiS[2]), the authors have decided to present collected data in the form of rankings. The detailed methodology of preparing the rankings, the data sources used and the manner of obtaining information are described in the methodological appendix.

For the purpose of the report, a uniform method was used to create rankings of the most popular artists from individual music charts. The results are based on new databases collected from available online sources based on specially prepared automated tools. Owing to the diverse nature of collected rankings and aggregating information between them, the authors have been able to identify the most popular artists irrespective of the music distribution channel.

The employed methods allowed for a comprehensive and internally coherent presentation of the Polish music market. This was possible in spite of the lack of comprehensive, full and unified data about the Polish music market. Parts of the report that require prudent analysis on behalf of readers due to limited data are clearly marked. In the authors' opinion, public administration should spend the most energy and financial resources on improving the data collection process as well as monitoring and publishing data. Consequently, subsequent analyses of the music market could be more comprehensive in nature. This would facilitate the process of planning public policy and enhance the effectiveness of artist support, while enabling artists to gain greater popularity (also abroad).

The tools developed in the course of working on the report as well as the analysed data sources may be used again to ensure methodological continuity of research on the structure of the Polish music market in the years to come. Nevertheless, they should be treated as a starting point, and be gradually supplemented and improved by data collected and made available for research purposes on the administrative level.

The Polish music market does not differ greatly from foreign markets. Similar trends to those present globally can also be seen in Poland:

- Increasing value of the music market and systematic return to the values before crisis it faced since the 2000s;
- Growing share of independent labels in the phonographic industry;

[1] https://www.billboard.com/charts

[2] http://olis.onyx.pl/listy/

- Ever greater role of streaming and the internet in building artist popularity;
- Growing share of the concert market in artist revenues.

What sets the Polish music market apart from the global one is, above all:

- The share of physical sales on the recorded music market is several times greater and no clear departure from these formats has been observed;
- Considerable importance and listenership of the radio, which remains unchanged despite the growing importance of streaming platforms and the Internet;
- Relatively low popularity of disco polo – a genre unique to Poland;
- Polish artists are much more popular than foreign ones. This difference is particularly noticeable in the case of hip hop.

Poland's recorded music, music publishing and synchronisation market in 2016–18

- In 2018, Poland's total music market was valued at PLN 360 million. This number is made up of physical and digital sales, synchronisation revenues and producer's rights;
- In 2018, the value of music sales on the Polish market amounted to PLN 330 million;
- There are 150 record labels generating more than PLN 0.5 million a year on the Polish market;
- Five Diamond awards (sales of more than 150,000 physical copies) were granted in 2018;
- In 2018, Poland's best-selling record charts were dominated by pop music and hip hop; 84% of the most popular artists in 2018 came from Poland;
- In 2018, Polish artists received a total of over 540 PLN million in royalties;
- Vinyl sales amounted to more than PLN 30 million. This accounts for ca. 14% of physical sales in Poland.

Artists

- In 2018, pop artists appeared on weekly charts of best-selling records in Poland more than 500 times in total, hip hop artists more than 300 times;
- Pop is the most frequently selected genre in all content distribution channels apart from the vinyl market, which is dominated by rock;
- Radio and TV are characterised by the lowest degree of diversification in terms of the broadcast music genres;
- In most radio stations, the most frequently played tracks include: songs by Polish artists, disco polo songs, most recent songs (released over the last two years) and songs from the 1980s.
- Hip hop is predominantly popular online, particularly on YouTube and Spotify;
- Polish hip hop artists are most popular on YouTube. The 25 most popular songs in Poland in 2018 recorded a total of 1.2 billion views. Polish hip hop accounted for 80% of them (over 900 million).

Concert market

- The concert market has not been the subject of a complete and comprehensive review before, while the relevant maintained and available records relative to this matter are fragmentary;
- The concert market is the most diverse in terms of music genres;
- In 2018, the percentage of Poles declaring they have attended a concert amounted to 44%;
- Only 8% of respondents pointed to concerts as their main source of music;

- According to data from the Coigdzie.pl® website, around 90,000 concerts and music events were organised in 2018;
- Most concerts take place in April and November;
- The greatest number of concerts per 10,000 inhabitants is organised in Pomorskie and Małopolskie Voivodeships;
- Around 7,000 concerts were reported to ZAiKS;
- More than half of the concerts reported to ZAiKS were events, for which performers received no more than PLN 500;
- In total, ZAiKS recorded PLN 40 million in revenues from reported events;
- 85 music festivals were held in Poland in 2018;
- 24,000 classical music concerts were organised in 2018.

Export

- In 2018, Polish collective management organisations received PLN 6 million from their foreign counterparts for music broadcast outside Poland;
- Polish artists are most popular in Germany and Nordic countries;
- Mostly those artists, who are also popular in Poland, gain popularity abroad. One exception are Polish metal bands, which have more listeners abroad than in Poland.
- Polish composers of classical music (e.g. Frederic Chopin) and film scores also have international listenership.

Musical preferences of Poles

- Poles mostly enjoy pop, disco polo and rock;
- Pop music is more often listened to by women, people aged 25–34, those with higher education, and residents of medium-sized and large cities;
- Men and women like disco polo to a comparable degree. The strongest preference for this genre is among people aged 45–54, residents of rural areas and those with vocational education;
- Men like rock more often than women. This music genre is most popular among people aged 18–44, residents of large cities and those with higher education;
- Classical music is more often indicated as the favourite music genre by women, people aged 65 and older, residents of large cities and those with higher education;
- Paluch, Rihanna and Szpaku are the most recognizable artists among Polish teenagers.

Institutional support for the Polish music market

- Institutional support granted to musicians is diverse and manifests itself through activities of the state (Ministry of Culture and National Heritage, institutes), the market (media), and non-governmental entities (associations, foundations, associations managing copyrights);
- There are two main paths of offering support – direct (programmes, scholarships, competitions, awards) and indirect (promotion, dissemination);
- Among public institutions, the main entities include the Ministry of Culture and National Heritage, the institutions it supervises that deal with music, e.g. the Institute of Music and Dance, the Polish Music

Publishing House, the Fryderyk Chopin Institute, the Adam Mickiewicz Institute, as well as municipal and voivodeship-level governments;

- Supporting institutions from the non-governmental sector mainly include associations and foundations, e.g. the Meakultura Foundation, the Association of Polish Music Artists, the Polish Music Foundation, the Independent Polish Recording Association, as well as trade unions and collective management organisations (e.g. ZAIKS, ZPAV, STOART, SAWP);
- There also exist co-operation networks, which most often unite smaller entities from the non-governmental sector, e.g. the Music Export Poland Foundation, the Alliance of Independent Music Producers and the Polish Music Council.

Educational opportunities for the music industry

- The majority of tertiary music education programmes (82%) can be said to formally develop business competencies;
- At present, such education is often superficial. Nevertheless, positive developments may be observed;
- The need to build business competencies is most comprehensively addressed by the specialist offer of art and business education:
    - study majors in higher education (19 majors within 14 different fields of study), majors for musicians include: journalism and music business, music journalism, music in the media, music production, leading jazz and entertainment music ensembles, leading vocal and vocal-instrumental ensembles;
    - post-graduate programmes (29 programmes within various fields of study), programmes for musicians include: management academy for creators and artists, artist manager on the music market, music manager, music in the media, management for creators, artists and cultural organisers;
    - other educational initiatives, including (1) educational programmes, trainings and courses, (2) academic and industry conferences and panels organised during various music industry events, (3) available sources of knowledge about the music business and music culture management.

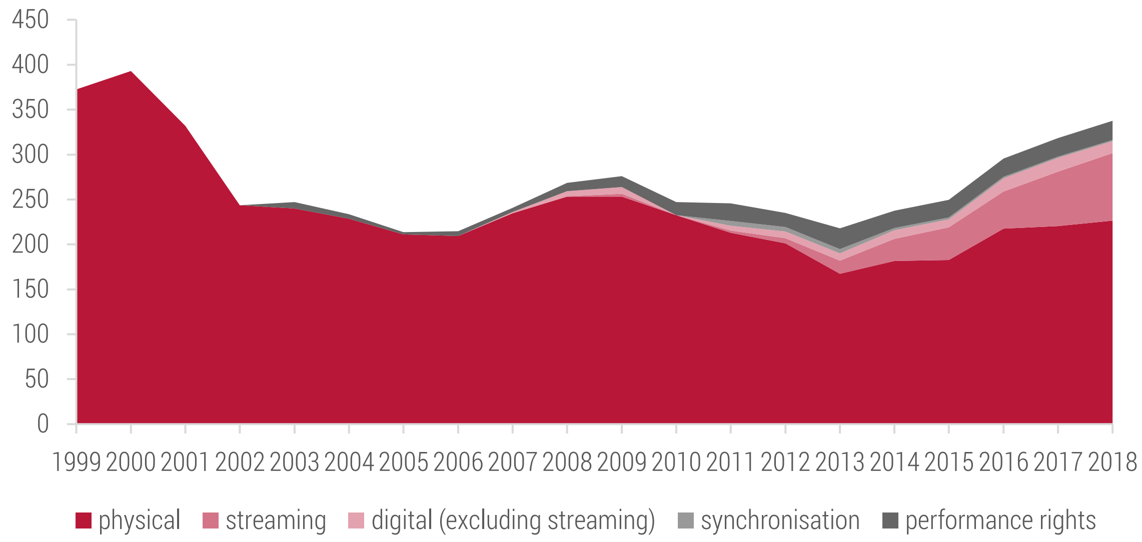
1. Poland's recorded music, music publishing and synchronisation market 2016–18

1.1. The value of selected segments of the Polish music market

How much is Poland's recorded music, music publishing and synchronisation market worth?

In 2018, Poland's total music market was valued at PLN 360 million. This number is made up of physical and digital sales, synchronisation revenues and producer's rights. The market value has been on the rise since 2013, mostly owing to growing physical and digital sales, which represent as much as 80% of the market. Consequently, the Polish music market is returning to figures recorded towards the end of the 20th century. The quality of available data on music publishing and synchronisation market value is not as good as information concerning sales revenues on the recorded music market. Data published by the relevant bodies is sometimes at odds with each other and certain years are not accounted for. As a result, estimates presented on Figures 1, 2 and 3 are informed by reports published by the International Federation of the Phonographic Industry (IFPI)[3] as well as data from the Polish Society of the Phonographic Industry (Polish: *Związek Producentów Audio-Video*, further: ZPAV). Missing information has been supplemented based on available data, reports, research studies and expert commentaries.

Figure 1. Value of selected segments of the Polish music market 1999-2018 (in PLN million)

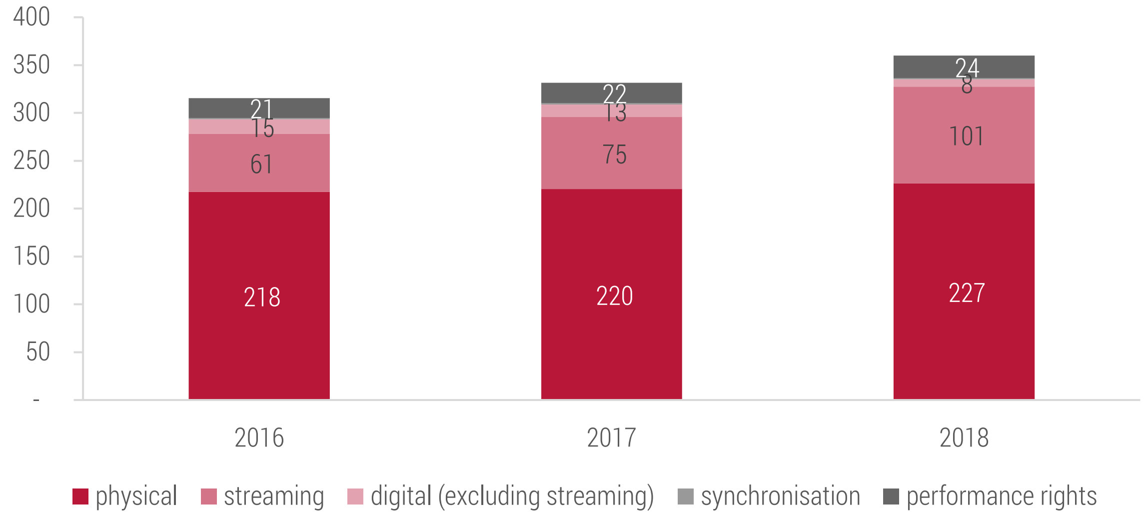


Source: own work based on ZPAV and IFPI data (1999–2018)

Note: data expressed as 2018 values.

[3] Segments of the music market are defined in line with reports published by the International Federation of the Phonographic Industry (IFPI), which interprets synchronisation as revenues from the use of music in advertising, films and television. Music publishing is understood as copyright sales, while performance rights refer to recorded music only (the term does not correspond to the concert market, which is discussed in the full version of the report).

Figure 2. Value of selected segments of the Polish music market in 2016–18 (in PLN million)

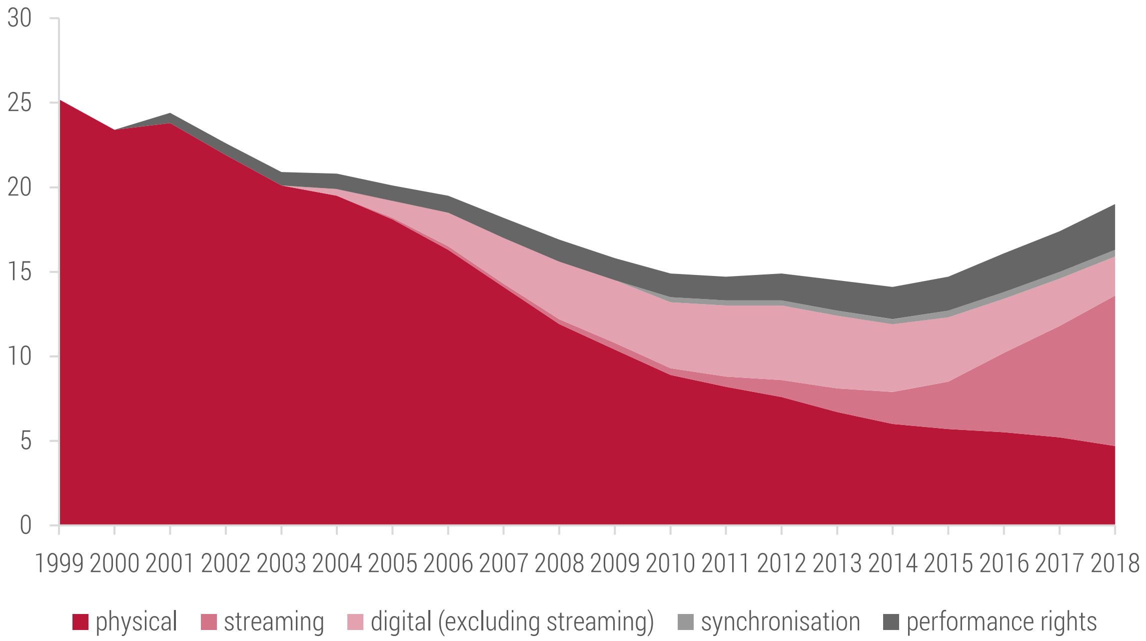


Source: own work based on ZPAV (2018)

Note: data expressed as 2018 values.

Changes on the Polish music market follow those taking place globally, although they seem to be less advanced. For instance, physical sales are still dominant in Poland, whereas globally they were overtaken by digital back in 2017. Given the growing popularity of streaming platforms, the dynamics of the Polish market is likely to continue to mirror global developments in that respect. Until 2012, growing digital revenue was mostly driven by single track sales, e.g. via iTunes. Not long afterwards, however, this model began to lose popularity as streaming services gained momentum.

Figure 3. Value of selected segments of the global music market 1999-2018 (in USD billion)



Source: IFPI (2019).

Case Study 1. Transformation of the music market

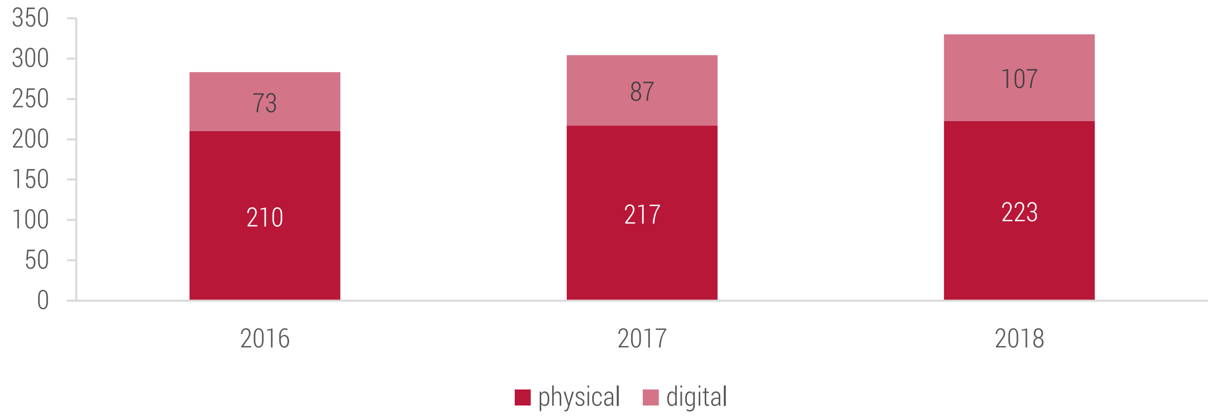
Traditionally, the music market's falling value at the outset of the 21st century has been attributed to the advent of digital formats, which were originally available solely from illegal sources (Smith and Telang, 2016). The foremost example of such a source was Napster, which at the turn of the millennium enabled its online users to exchange single tracks. The first significant store offering legal sales of digital music, iTunes, was only launched in 2003. Here it is worth noting that better quality music (256 kbps, i.e. still about five times worse than physical formats) was introduced to its offer even later than that, in 2009. At present, it is hard to say whether the decreasing importance of physical formats has been affected more by online piracy or the unbundling of music sales, i.e. changing the sales model to individual tracks. With the launch and further growth of Spotify, the largest streaming platform, in 2008 – as well as the launch and growth of its competition – single track sales are falling and gradually being replaced with revenues from paid subscription and advertising. This phenomenon is sometimes referred to as rebundling, because the market has shifted from single tracks to subscription packages that give access to a broad catalogue of music.**

Other reasons behind the music market's decreasing value in the early 21st century (apart from the emergence of the Internet) are described, e.g., in Oberholzer-Gee F., Strumpf K. (2007). The Effect of File Sharing on Record Sales: An Empirical Analysis. *Journal of Political Economy*, 115(1), pp. 1-42.

What is the value of music sales in Poland?

In 2018, the value of music sales on the Polish market amounted to PLN 330 million (Figure 4). Digital sales increased by around PLN 34 million against 2016 figures, coupled with a simultaneous growth of ca. PLN 13 million in physical format sales.[4] Digital formats are growing at a much higher rate compared to 2016 – 20% and 23% in 2017 and 2018 respectively (physical format sales have increased by a mere 3%). According to ZPAV data, streaming currently accounts for 93% of the digital market.

Figure 4. The value of music sales on the Polish market 2016-2018 (in PLN million)



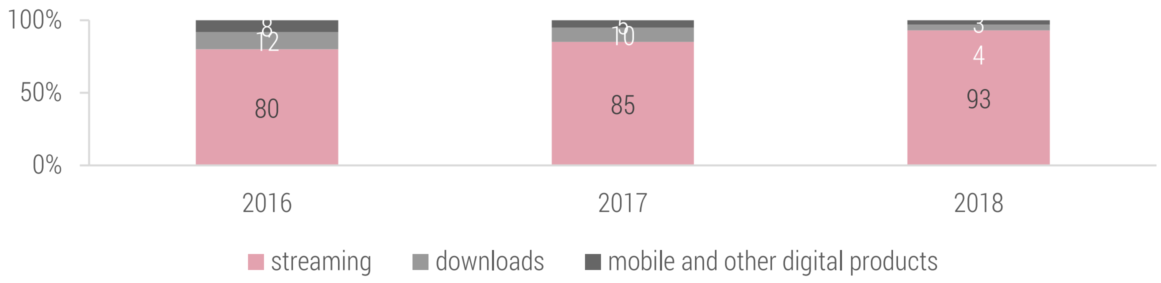
Source: own work based on ZPAV data

Since 2014, the importance of streaming in Poland has been growing systematically (until 2018, the increase amounted to 13 p.p. compared to the previous year). Other digital music sales channels in Poland are currently of marginal importance. Despite the growing sales of both physical and digital formats, the ongoing growth on

[4] In nominal terms.

the music market is undoubtedly driven by streaming. At present, streaming is not as widespread in Poland as it may be observed on the global market – little more than half of Poles use streaming services, whereas the global average is more than 60% (IFPI, 2018).

Figure 5. Digital music sales in Poland 2016-2018 (%)



Source: own work based on ZPAV data

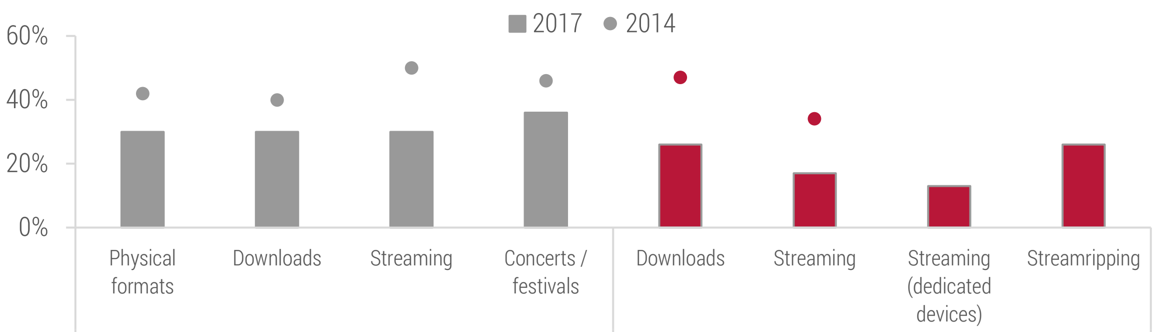
How much do Poles spend on music?

The latest available study on the consumption of cultural goods performed on a representative group was conducted by Statistics Poland (GUS) in 2014:

- In 2014, the average Pole spent PLN 7.68 on sound and video recording carriers,
- 51% of households collect records,
- 25% of households purchased at least one record in 2014 (0.7% vinyl, 24.5% at least one CD or DVD with music).

Another research project of this type (on a smaller group of respondents, representative of the population of Internet users) was developed by the Institute for Information Law at the University of Amsterdam and financed by Google. The study showed that around 30% of analysed Internet users relied on each of the legal music distribution channels (records, downloads, streaming and live performances) in 2017 (Ende et al., 2018). At the same time, between 13% and 26% of Polish Internet users obtained music from illegal sources. According to researchers, the 2017 figures were lower than those recorded in 2014.

Figure 6. Share of Polish Internet users listening to music by distribution channel in 2014 and 2017 (%)



Note: "Streaming (illegal, dedicated devices)" stands for using devices with software that enables free streaming from illegal sources. "Streamripping" stands for using software to illegally download streamed music onto the computer's hard drive.

Source: based on Ende et al. (2018)

1.2. A detailed characteristic of the Polish market

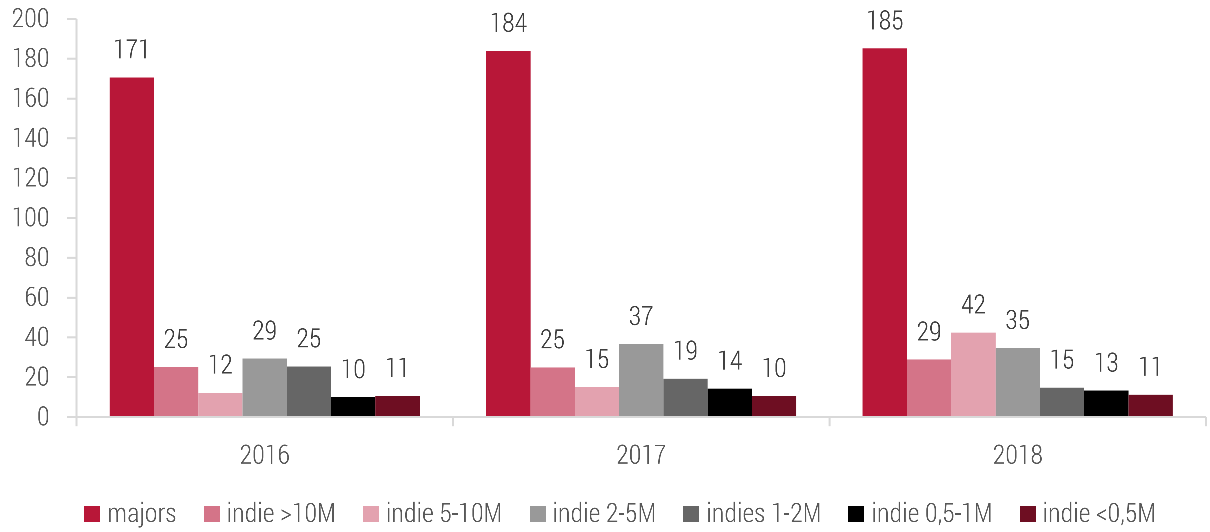
One of the effects of technological progress are lower barriers to enter the creative industries. Throughout most of the 20th century, a small number of labels controlled a selection of artists with whom a contract would be signed, giving them access to promotional channels and enabling them to produce and distribute their records. Since physical releases would make their way to music shops where, by default, the available space was limited, such decisions were only made with respect to the subgroup of the most promising artists. Digitisation eroded each of these barriers. Artists are now able to promote their own work (e.g. on social media), produce their music at a relatively low cost, distribute it digitally – and avail themselves of the unlimited virtual shopping space.

As a result of these changes, many more artists appeared on the market, which contributed to the emergence of the so-called long tail distribution. It turned out that a large number of relatively little known artists was able to generate total profits that were similar to those earned by the few most popular performers. The emergence of artists whose albums would not have previously been released, increased the chances for stardom outside the roster of major record labels. These trends translate to the growing importance of smaller, independent labels on the music market.

Who releases music in Poland?

There are 150 record labels generating more than PLN 0.5 million a year on the Polish market. In 2016–18, the three largest labels (so-called majors) together recorded average annual revenues of ca. PLN 180 million. Yet the largest growth in 2018 was noted by independent labels earning between PLN 5 and 10 million – their revenues surged by 27 p.p. (Figure 7).[5]

Figure 7. Revenues of record labels in Poland in 2016–18 (in PLN million)



Source: own work based on ZPAV data

[5] The described growth concerns both labels within the aforementioned revenues category and labels that surpassed the bottom revenue threshold and joined the group.

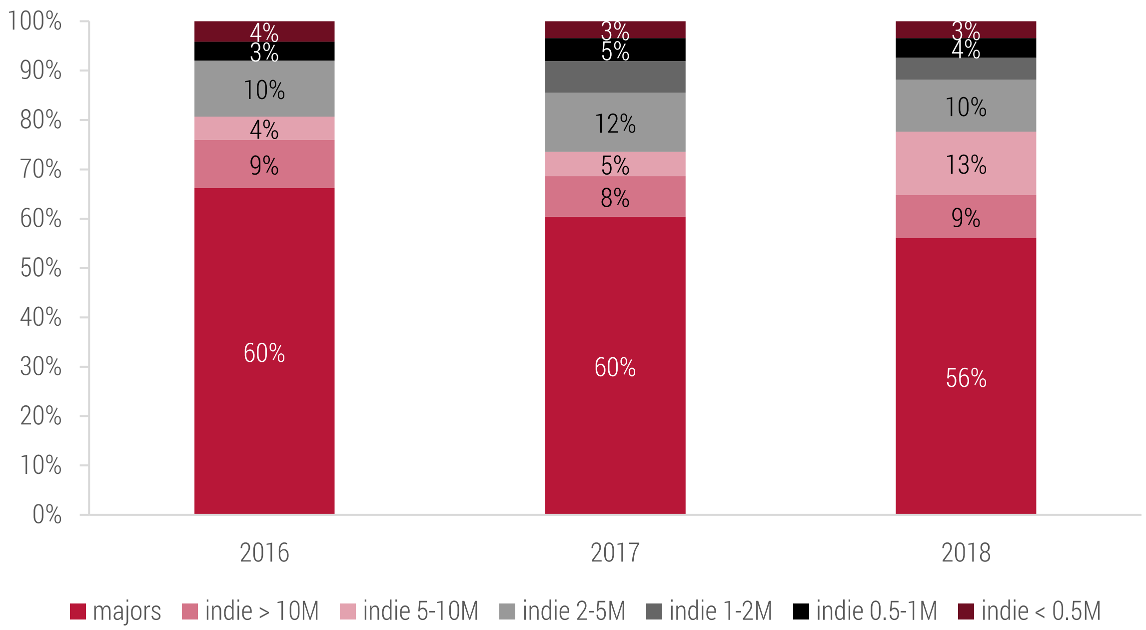
Table 1. Changes in revenues recorded by record labels in 2016–18 (in PLN million and %)

Record label	Sales			Change	
	2016	2017	2018	2017/2016	2018/2017
majors	170.5	183.9	185.1	8%	1%
indie > 10M	25.1	24.9	28.8	-1%	16%
indie 5-10M	12.2	15.0	42.4	23%	182%
indie 2-5M	29.3	36.6	34.6	25%	-5%
indie 1-2M	25.4	19.3	14.8	-24%	-23%
indie 0.5-1M	9.9	14.2	13.2	44%	-7%
indie < 0.5M	10.6	10.5	11.2	-1%	7%

Source: own work based on ZPAV data

The three largest record labels account for the greatest share (56%) of the Polish music market (Figure 8). Compared to 2017, there is a decrease by 4 p.p. The greatest boost was recorded by record labels earning between PLN 5 and 10 million: from a mere 5% share in the market, they surged to 13% in 2018.

Figure 8. Market share of record labels in Poland in 2016–18 (%)



Source: own work based on ZPAV data

The growing share of independent labels on the recorded music market is also noticeable globally. According to a series of reports by Wintel (2016, 2017, 2018), indie labels approximated a 40% share in the global music market in 2017, recording the total revenue of USD 6.7 million. Authors of the report also noticed that a substantial part of records released by indie labels (ca. 22.4%) was still distributed by their larger counterparts.

Table 2. Changes in the market share (%) and number of record labels in 2016–18

Record label	Market share			Number of companies		
	2016	2017	2018	2016	2017	2018
majors	60.26%	60.41%	56.07%	3	3	3
indie > 10M	8.86%	8.19%	8.73%	2	2	2
indie 5-10M	4.32%	4.94%	12.84%	2	2	6
indie 2-5M	10.35%	12.01%	10.49%	8	12	12
indie 1-2M	8.97%	6.33%	4.47%	18	13	10
indie 0.5-1M	3.49%	4.67%	4.00%	14	20	19
indie < 0.5M	3.75%	3.45%	3.39%	94	100	98

Source: own work based on ZPAV data

1.3. Artist revenues according to data published by collective management organisations

The role of collective management organisations (CMOs) involves representing artists/authors and enforcing rights to the use of their works. CMOs collect – on behalf of the artists – revenues obtained for the possibility of playing or using a given work by companies, institutions and natural persons. From the artists' standpoint, the most important sums are the amounts collected for the exercise of copyrights and the amounts distributed among the rightholders. All relevant data cited in the report comes from the financial statements and reports on the activity of individual CMOs.

There are five associations representing the authors of musical works in Poland:

1. ZAiKS Authors' Association [Polish: *Stowarzyszenie Autorów ZAiKS*; further: ZAiKS]
2. Association of Polish Stage Artists [Polish: *Związek Artystów Scen Polskich*; further: ZASP][6]
3. Association of Performing Artists of Music and Music with Lyrics [Polish: *Stowarzyszenie Artystów Wykonawców Utworów Muzycznych i Słowno-Muzycznych*; further: SAWP]
4. Union of Performing Artists [Polish: *Związek Artystów Wykonawców STOART*; further: STOART]
5. Polish Society of the Phonographic Industry [Polish: *Związek Producentów Audio-Video*; further: ZPAV]

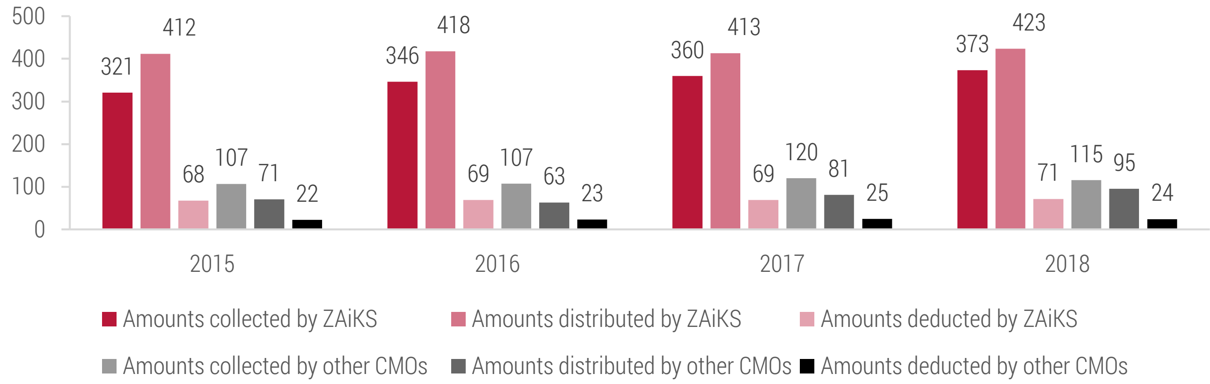
[6] ZASP mostly represents filmmakers and theatre artists.

Figure 9. Share of collective management organisations in the Polish music market by collected, distributed and deducted amounts in 2018 (%)

Source: financial statements and reports on the activity of ZAiKS, ZPAV, STOART and SAWP (2018)

The largest organisation, both in terms of the number of members as well as amounts collected and distributed to artists, is the ZAiKS Authors' Association, which was founded in 1918. ZAiKS manages the rights of more than 16,000 entities and between 2015 and 2018 paid more to the affiliated artists than it collected for the exercise of copyrights to their works. This is due to the fact ZAiKS has considerable funds (over PLN 1 billion) accrued from previous years of operations, which it tries to systematically distribute among artists in subsequent years (in cases where it earlier proved impossible to establish copyrights for playing a given song).

Figure 10. Collective management organisations by collected, distributed and deducted amounts in 2018 (in PLN million)



Source: financial statements and reports on the activity of ZAiKS, ZPAV, STOART and SAWP (2016–18)

Table 3. Selected items from the financial statements of collective management organisations in 2018 (in PLN million)

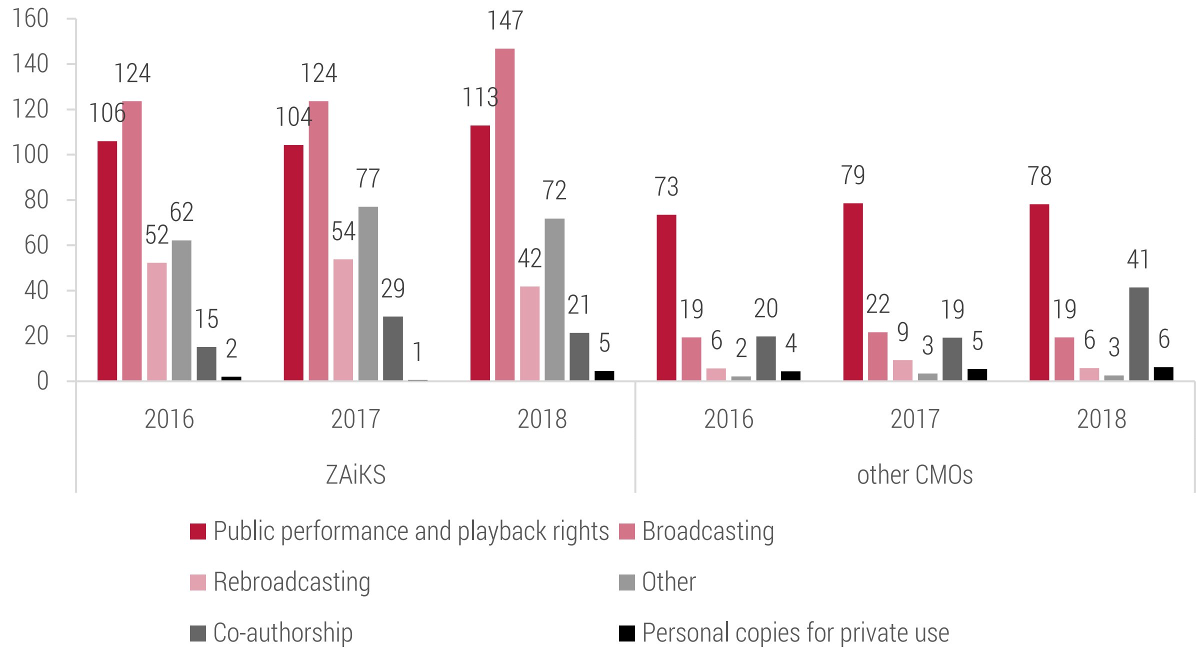
Item in the financial statements	ZAiKS	ZPAV	ZASP	STOART	SAWP
Collected amounts	373.4	43.7	37.7	50.1	21.4
Distributed amounts	423.4	42.5	21.6	18.5	34.4
Deducted amounts	70.9	10.1	4.0	9.8	4.3

Source: financial statements and reports on the activity of ZAiKS, ZPAV, STOART and SAWP (2018)

In 2018, Polish artists received a total of over 540 PLN million from this source. Almost 80% of this amount was transferred to artists affiliated with the largest Polish organisation (ZAiKS Authors' Association).

Over the last three years, there has been a steady increase in the amounts collected by CMOs. In the case of ZAiKS, broadcasting, i.e. playing music on the radio and television, represents the greatest share in this respect. Other CMOs collect the most for public performance and playback rights, i.e. concerts or playing music in public places (such as restaurants, hotels, etc.).

Figure 11. Statement of amounts collected by CMOs in 2016-18 (in PLN million)

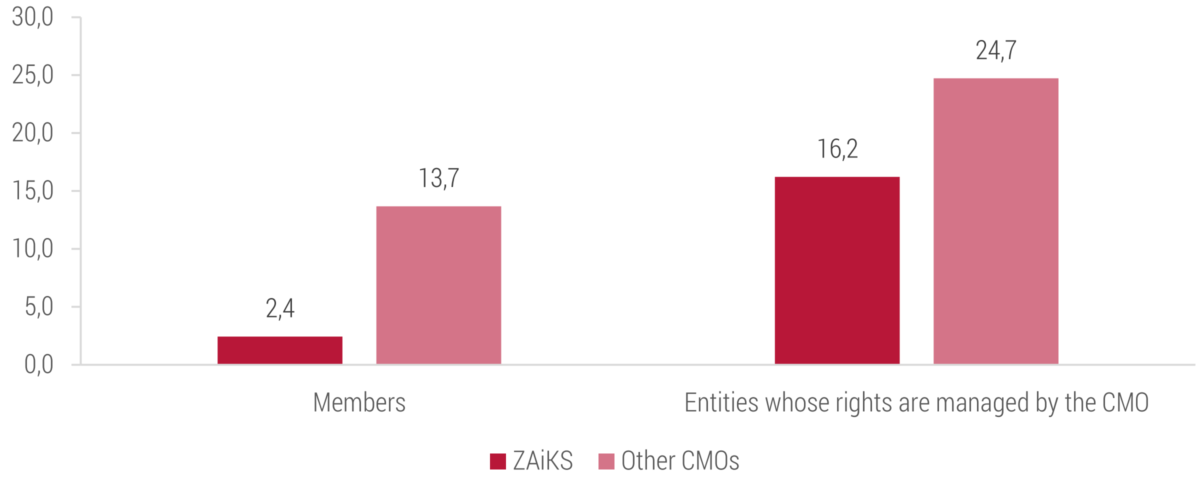


Source: financial statements and reports on the activity of ZAiKS, ZPAV, STOART and SAWP (2016–18)

Despite the fact that amounts collected and distributed by ZAiKS are markedly higher than those of the remaining CMOs, ZAiKS has considerably fewer members and represents a much lower number of entities. This means that on average ZAiKS collects decidedly higher sums for the use of music created by its members and disburses greater sums to artists.[7]

[7] In all likelihood, ZAiKS represents the most popular artists, which is why it collects and distributes the largest amounts between them. Unfortunately, these are speculations that cannot be confirmed on the basis of data published by CMOs.

Figure 12. Members and entities affiliated with CMOs (in thousands) in 2018



Source: financial statements and reports on the activity of ZAiKS, ZPAV, STOART and SAWP (2018)

Which streaming platforms are chosen by users?

The dynamics of changes on the Polish streaming market may be inferred from changes in Google Trends statistics concerning the popularity of searches for streaming services over the last 11 years. Google Trends data should not be treated as indicative of the market share, because it is not possible to establish how many people use a given service (or a dedicated app) directly, i.e. without searching for it in Google. Nevertheless, previous research has demonstrated that Google Trends data allows for a good assessment and indirect analysis of a number of phenomena.[8] According to an analysis of Google Trends:

- Muzodajnia was a relatively popular streaming service when it was launched in 2008. With time, however, its popularity petered out, a trend that continued even after it was renamed Plus Music in 2017.
- Open.fm's popularity surged at an early stage, peaking at the beginning of 2013. At the turn of 2013/2014, with the growing use of Spotify (which launched its Polish service in early 2013), Open.fm began to lose popularity.
- In 2016, Spotify was already more popular in Google searches than Open.fm. Spotify is the only streaming service demonstrating a continued growth trend since 2013 – in spite of the one-off fall in 2015 caused by the launch of Tidal in Poland.
- Tidal[9] was launched in 2015. It became relatively popular – initially at the expense of Spotify and Open.fm – and then remained on the same level.
- The popularity of YouTube Music, Deezer and Apple Music (iTunes) has recently begun to change. However, until 2019, they have scored relatively low in Google searches.

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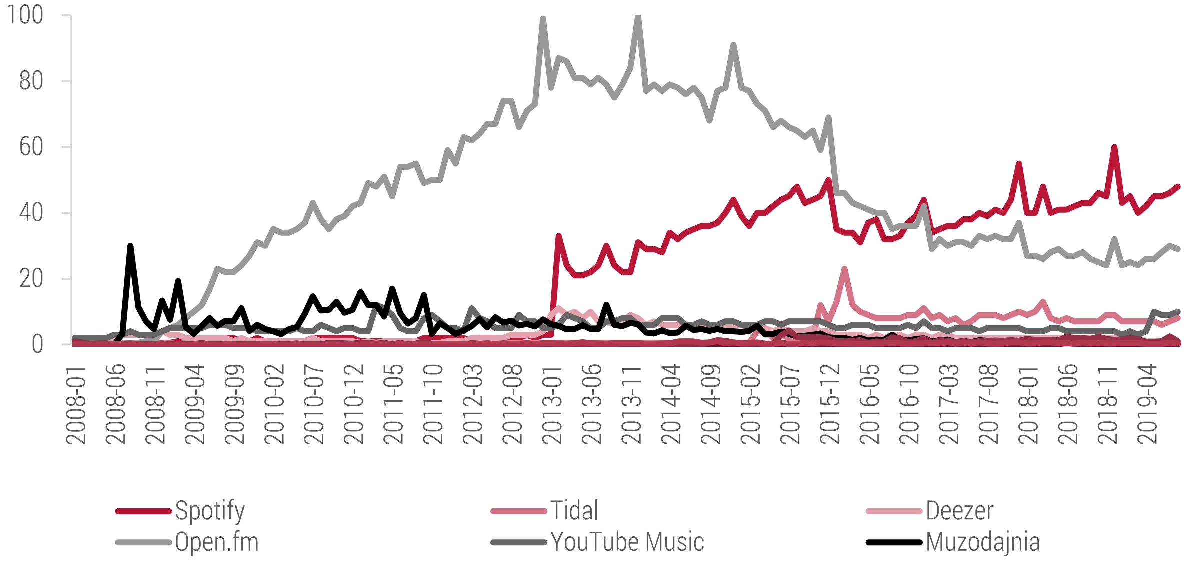
[8] Choi and Varian, 2012: https://onlinelibrary.wiley.com/doi/abs/10.1111/j.1475-4932.2012.00809.x , https://ssl.gstatic.com/think/docs/quantifying-movie-magic_research-studies.pdf

[9] The brand name Tidal appeared in 2015; the system itself was available on the Polish market earlier under the name WIMP and was taken over by Tidal.

Figure 13. The popularity of Google searches (Google Trends) for streaming services in Poland in 2008-19.

Source: own work based on Google Trends data



Case Study 2. Does streaming cannibalise the music market?

Latest research on the influence of streaming on the music market points to a negative effect of both free and paid streaming services on consumer music spending. Free streaming services decrease spending on music by ca. 11%, and paid ones by ca. 24%. These results suggest that consumers do not treat streaming as a tool to check out the music they may later buy. Streaming turns into a substitute for consumption, occupying a dominant place among music distribution channels. Nevertheless, it ought to be noted that streaming services have a decidedly positive impact on revenues generated by the music industry as a whole, and their effects should be analysed with respect to individual groups of entities (e.g. artists, labels, distributors, etc.) (Wlömert and Papies, 2019). The results obtained by Aguiar and Waldfogel (2018) confirm that streaming acts as a substitute for digital sales. However, the authors also point out that the surge of streaming services contributed to the falling popularity of illegal music sources.

Who sells the most records in Poland?

The Polish Society of the Phonographic Industry (ZPAV) publishes weekly rankings of the best-selling records in Poland – Official Retail Sales Charts (Polish: *Oficjalna Lista Sprzedaży*, further: OLiS).[10] There are three official music recording certifications granted based on sales results: Gold, Platinum and Diamond awards (Table 3). Best-selling artists receive the Gold award first. As their sales go up, they may get the Platinum award (the record can go four times platinum if 120,000 copies are sold) and the Diamond award (artists may get multiple Diamond certifications: for instance, the record may be certified two-times diamond for selling 300,000 copies, three-times diamond for 450,000 copies, etc.).

[10] olis.onyx.pl

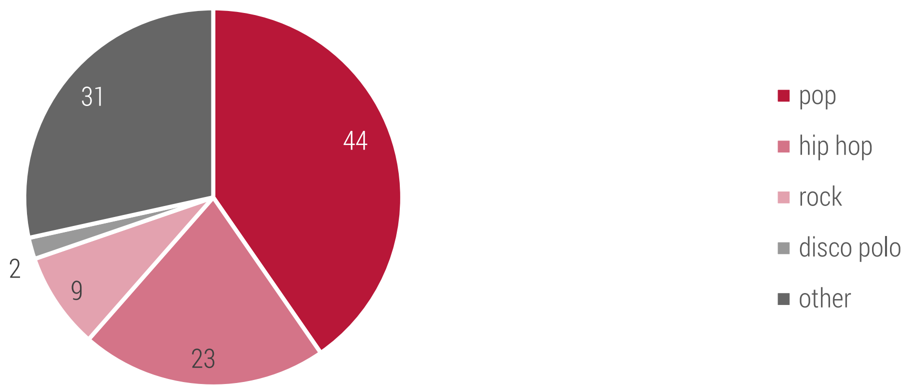
Table 4. The rules of granting certifications for record sales

<table>
<tr><th colspan="3">Record type</th><th colspan="2">Gold award</th><th colspan="2">Platinum award</th><th colspan="2">Diamond award</th></tr>
<tr><td colspan="2">Pop – domestic</td><td>Compilations</td><td colspan="2">15,000</td><td colspan="2">30,000</td><td colspan="2">150,000</td></tr>
<tr><td colspan="2">Pop – foreign</td><td>Soundtracks</td><td colspan="2">10,000</td><td colspan="2">20,000</td><td colspan="2">100,000</td></tr>
<tr><td colspan="3">Digital singles (quantity/revenue)</td><td>10,000</td><td>PLN 20,000</td><td>20,000</td><td>PLN 40,000</td><td>100,000</td><td>PLN 200,000</td></tr>
<tr><td>Classical</td><td>Classical – popular</td><td>Jazz / Blues / Folk / Roots</td><td colspan="2">5,000</td><td colspan="2">10,000</td><td colspan="2">50,000</td></tr>
</table>

Source: own work based on ZPAV data (2018)

In 2018, 109 CD albums received the Gold award. More than ¾ were released by Polish artists. The dominant genre was pop music, but a significant share of the awards went to rappers (Figure 10). A total of 65 records were certified platinum, 75% of which were released by Polish artists. Diamond awards were granted to three Polish and two foreign artists (Table 4). In 2018, the first disco polo record received diamond status.

Figure 14. Gold awards by music genre in 2018



Source: own work based on ZPAV data

Note: The music genres were assigned by Spotify

Table 5. Diamond awards in 2018

Artist	Title	Genre	Country
Akcent	Przekorny los	Disco polo	PL
Popek & Matheo	Król Albanii	Hip hop	PL
Dawid Podsiadło	Annoyance and Disappointment	Pop	PL
Ed Sheeran	Divide	Pop	UK
Sia	This is acting	Pop	UK

Note: The music genres were assigned by Spotify

Source: own work based on ZPAV data

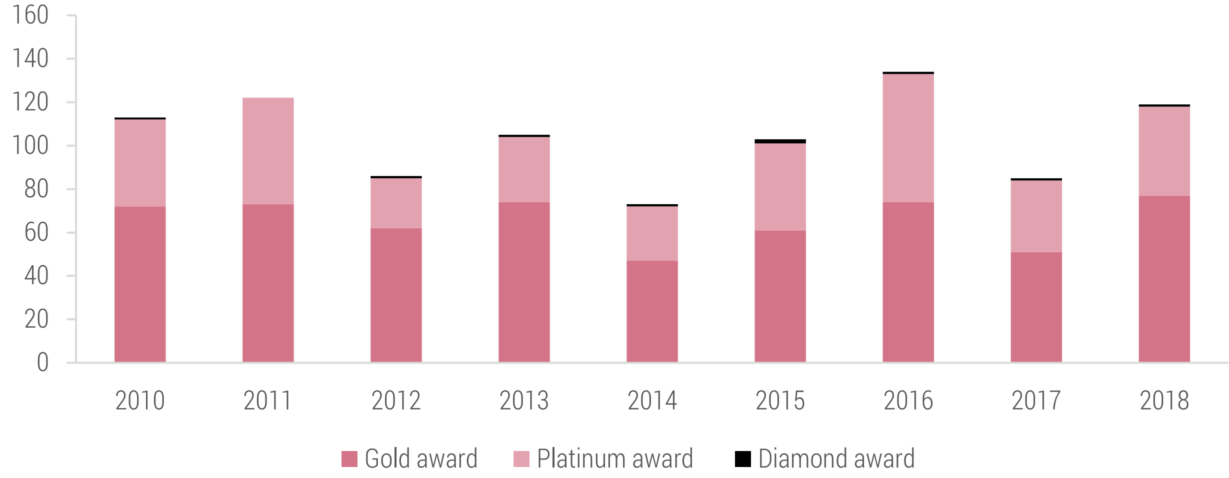
Since 2010, an average of 66 Gold, 37 Platinum and 1 Diamond award were granted in Poland on an annual basis (Figure 15). ZPAV has decreased the award threshold three times (Table 6), therefore presently granted awards are not equal to those awarded in the past.

Table 6. Changes in the rules of awarding sales certifications in 1995–2018

Term	Gold award	Platinum award	Diamond award
1995–96	100,000	200,000	-
1997–2001	50,000	100,000	500,000
2002–04	35,000	70,000	350,000
2005–now	15,000	30,000	150,000

Source: own work based on ZPAV data

Figure 15. Music recording certifications for Polish artists in 2010–18



Source: own work based on ZPAV data

The Diamond award was introduced in Poland in 1997. It was first granted to Kayah and Goran Bregović in 2000. Over the last 22 years, only five records were certified two-times diamond. These were two classical music and one jazz compilation released in 2005 (certified in 2007) and one pop record from 2012. Consequently, some records certified diamond in the past may have sold more copies than records that go multiple-diamond now (Table 7).[11]

[11] The number of records sold is based on official certification thresholds for these awards published by ZPAV.

Table 7. Best-selling records in Poland in terms of official sales certifications 1995-2018

Artist	Title	Genre	Release year	Country	Record label / distributor	Sales
Kayah i Bregović	Kayah i Bregović	Pop	1999	PL	BMG Poland	>500,000
Ich Troje	AD.4	Pop	2001	PL	Universal Music	>500,000
Ich Troje	Po piąte… a niech gadają	Pop	2002	PL	Universal Music	>350,000
Piotr Rubik	Psałterz Wrześniowy	Pop	2007	PL	Universal Music	>300,000
Adele	21	Pop	2011	UK	XL Recordings / Sonic	>200,000

Note: The music genres were assigned by Spotify

Source: own work based on ZPAV data

In table 8, we mention several sales certifications that may be important for the dynamics of hip hop sales in Poland (Table 7). Liroy's initial success in the 1990s and 2000s did not bring about a surge of interest in the genre (measured in the number of sold copies).

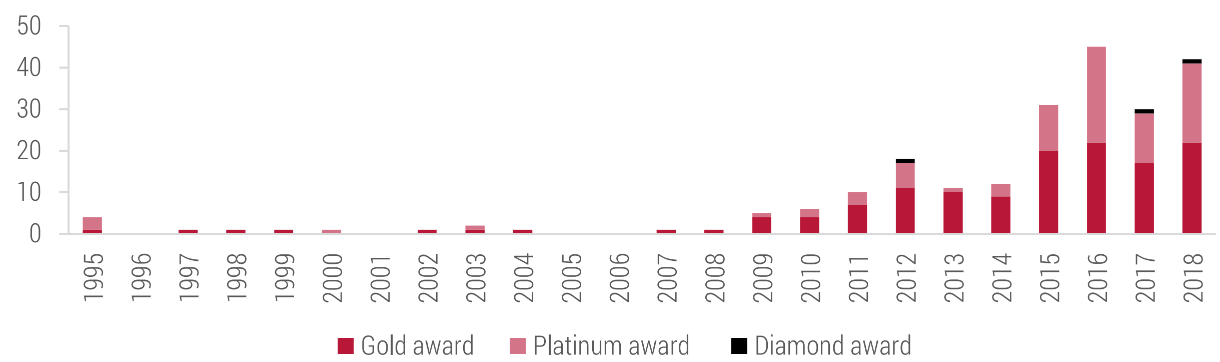
Table 8. Selected hip hop records that received sales certifications in 1995–2018

Year	Artist	Title	Record label	Award	Sales
1995	Liroy	Albóóm	BMG	Platinum award	> 200,000
2000	Liroy	Dzień szakala	BMG	Platinum award	> 100,000
2003	Peja	Na legalu?	T1-Teraz	Platinum award	> 70,000
2012	Donatan	Równonoc	Urban Rec	Diamond award	> 150,000
2018	Popek / Matheo	Król Albanii	Step Records	Diamond award	> 150,000

Source: own work based on ZPAV data

The growing sales of physical formats on the Polish market (especially in case of hip hop records) may be indirectly correlated with the increase of sales certifications granted since 2009.

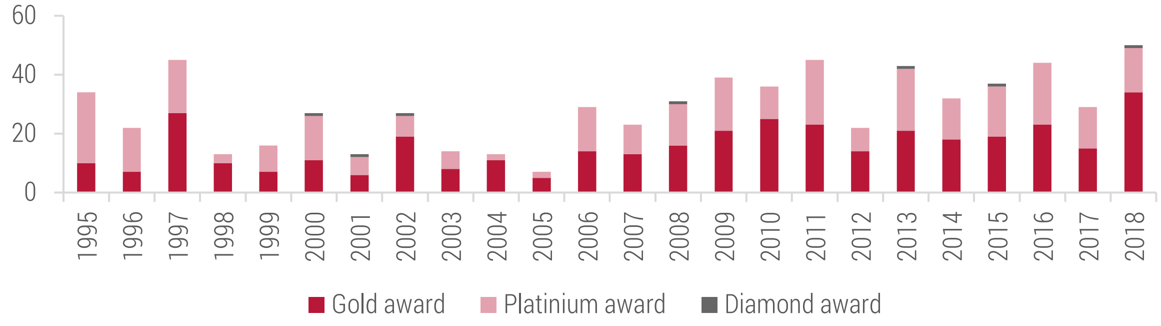
Figure 16. Certifications granted to Polish rappers for the number of records sold in 1995-2018



Note: figure depicts only physical recordings certificates.

Source: own work based on ZPAV data

Figure 17. Certifications granted to Polish pop musicians for the number of records sold in 1995-2018



Note: figure depicts only physical recordings certificates.

Source: own work based on ZPAV data

In 2018, Poland's best-selling record charts were dominated by pop music and hip hop. As many as 21 out of 25 most popular artists in 2018 came from Poland. Only six albums on the list were released by majors. The popularity of two compilations from the list, Queen's *The Platinum Collection – Greatest Hits I, II & III* and Whitney Houston's *I Will Always Love You. The Best of Whitney Houston* may be associated with the 2018 cinema release of *Bohemian Rhapsody* and *Whitney*. These film premieres boosted the sales of records that were released either more than a decade or several years ago.

Table 9. Best-selling records in 2018

#TOP	Title	Artist	Genre	Record label / distributor	Country
1	Małomiasteczkowy	Dawid Podsiadło	Pop	Sony Music / Sony Music Entertainment Poland	PL
2	Soma 0,5 mg	Taconafide	Hip hop	Taconafidex / e-Muzyka / Step Hurt	PL
3	W drodze po szczęście	O.S.T.R.	Hip hop	Asfalt Records / Asfalt Distro	PL
4	1984	Paweł Domagała	Pop	Domagała & Borowiecki / Mystic Production	PL
5	Czerwony dywan	Paluch	Hip hop	B.O.R. Records / Step Dystrybucja	PL
6	The Platinum Collection - Greatest Hits I, II & III	Queen	Rock	Island UK / Universal Music Polska	UK
7	To tu	Kękę	Hip hop	Takie Rzeczy Label / Olesiejuk	PL
8	Męskie Granie 2018	Various artists	Pop	Polskie Radio / Olesiejuk	PL
9	Mój dom	Kortez	Pop	Jazzboy Records / Olesiejuk	PL
10	The Best - Zacznij od Bacha	Zbigniew Wodecki	Pop	Mtj Agencja Artystyczna / Mtj Agencja Artystyczna	PL
11	Cafe Belga	Taco Hemingway	Hip hop	Asfalt Records / Asfalt Distro	PL
12	Atypowy	Szpaku	Hip hop	B.O.R. Records / Step Hurt	PL
13	The Greatest Hits	Sławomir	Disco polo	Sonicca / Agora	PL

Note: The music genres were assigned by Spotify
Source: own work based on ZPAV data (2018)

Table 9. Best-selling records in 2018 (continued)

#TOP	Title	Artist	Genre	Record label / distributor	Country
14	V8T	Kali, Flvwlxss	Hip hop	Ganja Mafia Label / Step Hurt	PL
15	The Best of	Ania Dąbrowska	Pop	Sony Music Entertainment Poland	PL
16	Mini dom	Kortez	Pop	Jazzboy Records / Olesiejuk	PL
17	Mej duszy dziecko	Hinol, Polska Wersja	Hip hop	District Area / My Music	PL
18	Ground Zero Mixtape	Pro8L3M	Hip hop	Rhw Records / Step Hurt/E-Muzyka	PL
19	Divide	Ed Sheeran	Pop	Warner Music UK / Warner Music Poland	PL
20	Malinowa …	Stanisława Celińska	Sung poetry	Musicom / E-Muzyka	PL
21	Wiedza o Społeczeństwie	Lao Che	Reggae	Mystic Production / Mystic Production	PL
22	Dobrze, że jesteś	Zbigniew Wodecki	Pop	Agora / Agora	PL
23	Evolve	Imagine Dragons	Rock	Universal / Universal Music Polska	USA
24	I Will Always Love You. The Best of Whitney Houston	Whitney Houston	Pop	Sony Music / Sony Music Entertainment Poland	USA
25	Opowiem Ci o mnie	Paweł Domagała	Pop	Domagała & Borowiecki / Mystic Production	PL

Note: The music genres were assigned by Spotify

Source: own work based on ZPAV data (2018)

In 2018, 71 independent labels and three majors received sales certifications. One indie label, Green Star, received more awards than the last of the major labels, Warner Music.

Table 10. Ranking of record labels in Poland by sales certifications received in 2018

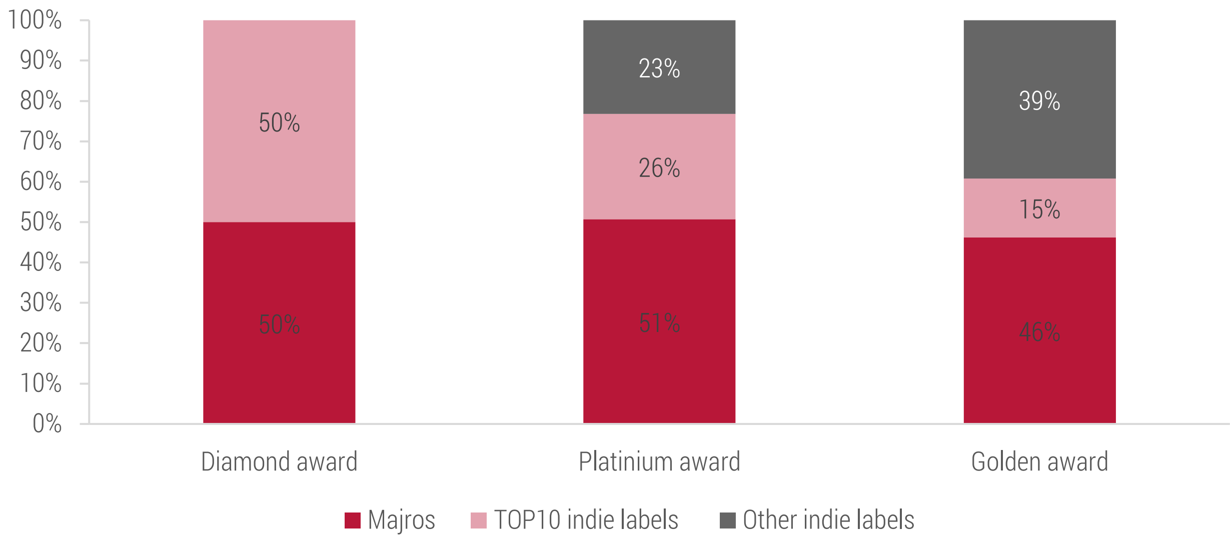
Majors				
#TOP	Name	Diamond award	Platinum award	Gold award
1	Sony Music PL	4	50	51
2	Universal Music PL	2	13	27
3	Warner Music PL	2	7	8
Indies				
1	Green Star	5	8	6
2	Step Records	1	7	5
3	Agora S.A.	1	1	4
4	Asfalt Records	0	4	2
5	C-Wave Records	1	1	1

Note: Data concerning sales certifications for record labels takes into account both physical formats and digital singles.

Source: own work based on ZPAV data (2018)

Irrespective of the type of certification, around a half of the awards given in 2018 went to the majors. The most-certified indie labels account for a half of Diamond awards. Their share in the remaining certifications falls to 26% and 15% for Platinum and Gold awards respectively.

Figure 18. Share in sales certifications granted in 2018 (%)

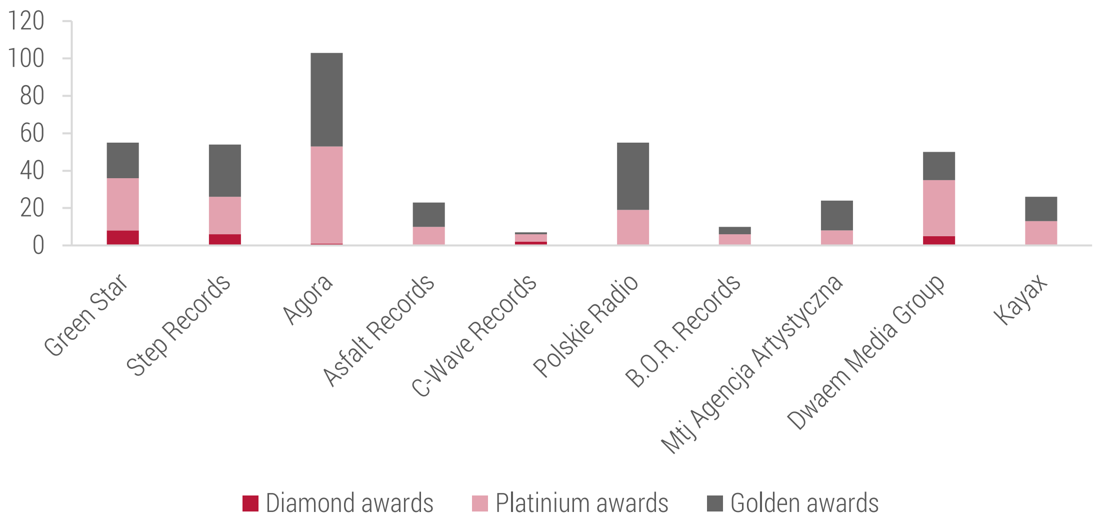


Note: Data concerning sales certifications for record labels takes into account both physical formats and digital singles.

Source: own work based on ZPAV data (2018)

Over the last 10 years, there has been a clear shift in the number of sales certifications granted to the top 10 indie labels from 2018. Agora received most certifications (74% and 96% for Gold and Platinum awards, respectively) in 2008–10. Throughout the last decade, Green Star did not receive any awards until 2016, while Step Records noted its greatest recording success starting from 2015.

Figure 19. Sales certifications for top 10 indie labels in 2008–18

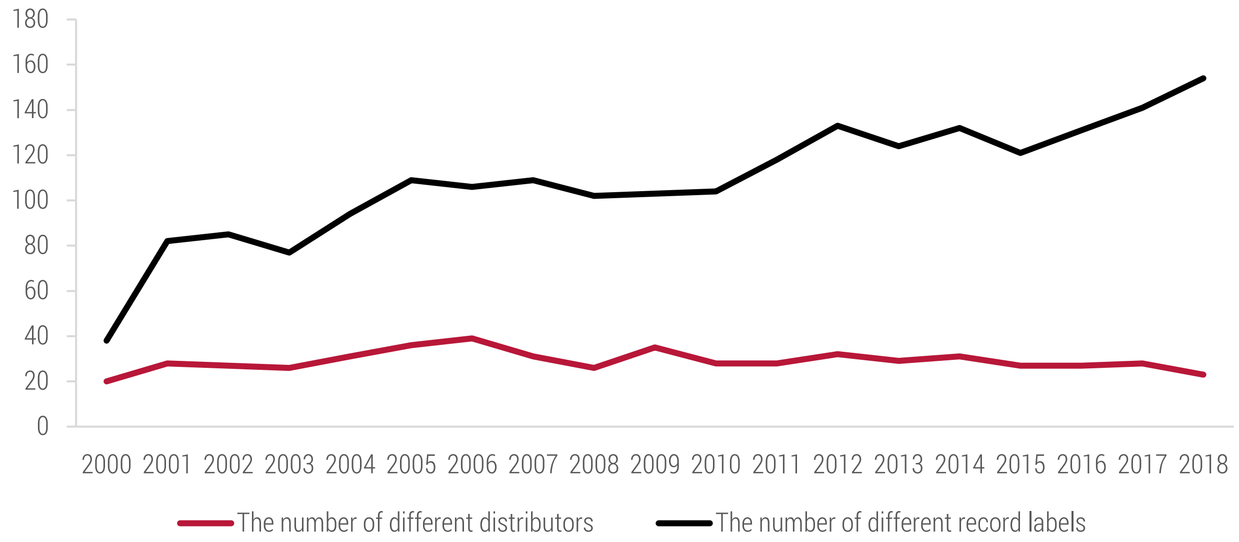


Note: Data concerning sales certifications for record labels takes into account both physical formats and digital singles.

Source: own work based on ZPAV data (2018)

Since the early 2000s, there has been a systematic increase in the number of record labels noted on OLiS charts, while the number of distributors remains relatively stable.

Figure 20. The number of different distributors and record labels in the course of the year on weekly OLiS sales charts

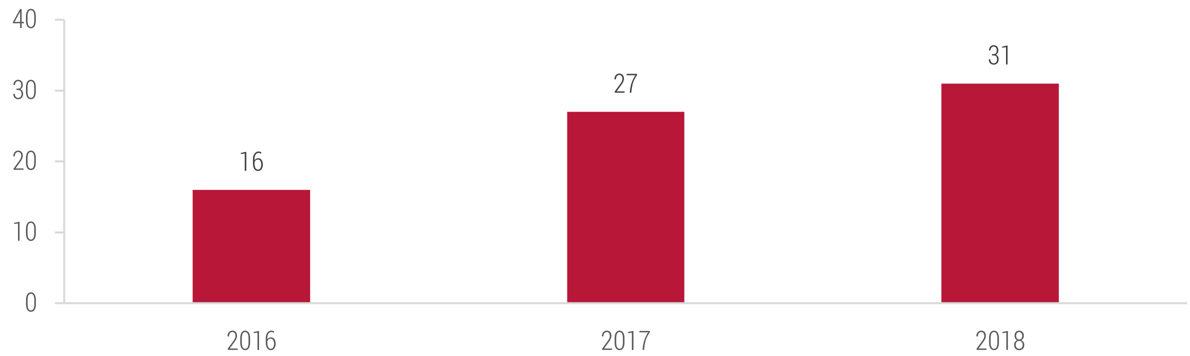


Note: The names of record labels were standardised using text analysis techniques. Nevertheless, duplicates cannot be excluded owing to typographic errors and differences in transcription.

Source: own work based on OLiS sales charts

The vinyl market in Poland has been growing systematically and vinyl sales have doubled since 2016 to more than PLN 30 million. This accounts for ca. 14% of all physical format sales in Poland.

Figure 21. Vinyl sales in Poland (in PLN million)



Source: own work based on ZPAV data (2016–18).

The global vinyl market has been growing since 2006. Back then it accounted for less than 1% of the global physical format market, but this share already amounted to 15% in 2018. Here it is worth noting that the vinyl sales observed in IFPI and ZPAV data constitute but a fraction of the actual market for such records. Each year more than double the amount of vinyls may be sold on the second-hand market. While such records are usually cheaper than new releases, the data indicates substantial demand for music recorded on vinyl (Rosenblatt, 2018).

2. Artists

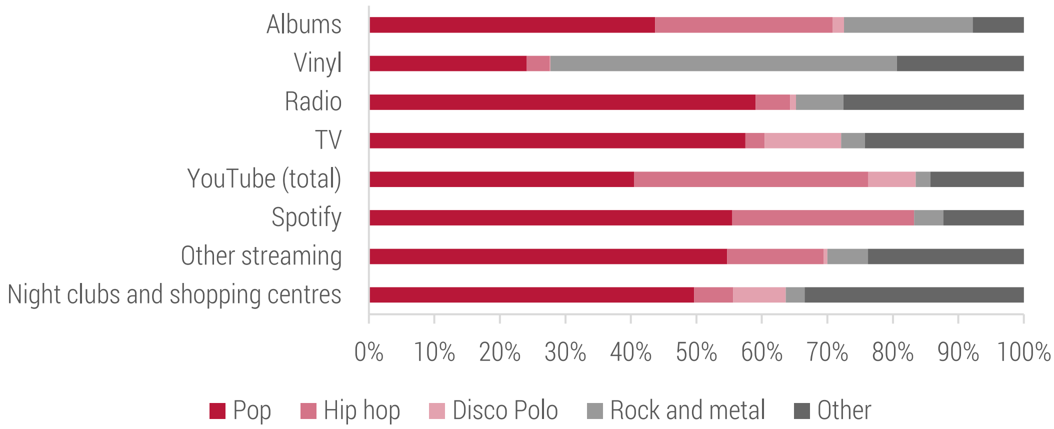
New technologies have provided artists with innovative, alternative recording and content distribution methods. Previously, production and distribution were controlled by record labels. Music market researchers underline the new opportunities for online content promotion, which enable consumers to try out music for free before potentially buying it. Musicians compete with record labels for listeners and consumers, while the development of digital technologies is unambiguously beneficial for artists (Bockstedt et al., 2006). Research has shown that artist revenues may decrease with the growing popularity of streaming. Consequently, artists may be interested in renegotiating their contracts, especially concerning the royalties. The new contracts would have to reflect the importance of new sources of revenue, most notably streaming (Wlömert and Papies, 2019).

In order to establish the popularity of artists across various music sources, the authors have identified 12 most important music distribution channels in Poland. The next step involved finding rankings presenting the most popular music among Polish listeners of the given platform. For each source, the authors strove to find data with the highest available frequency (e.g. weekly instead of monthly or annual charts). This allowed for a better coverage of changes occurring throughout the year and identifying a larger group of the most popular artists. Using state-of-the-art tools to automatically download content from the Internet, the authors then collected all available rankings and aggregated them into large datasets. Finally, text processing techniques were employed to standardise the names used throughout the charts, combine artist data across various rankings and link artist chart history with external data about the artists themselves. Ultimately, it has been possible to obtain large annual charts for each of the channels and match most artists with additional information, such as the genre they represent.

The following conclusions were formulated on the basis of analysed data:

- Pop is the most frequently selected genre in all content distribution channels apart from the vinyl market, which is dominated by rock.
- Traditional media (radio, TV) are characterised by the lowest degree of diversification in terms of the music genres they broadcast.
- Hip hop is popular in online content distribution channels, particularly YouTube and Spotify. What is more, hip hop artists are gaining popularity in OLiS CD album charts.
- The concert market and the CD market are the most diverse in terms of music genres.

Figure 22. The popularity of music genres by music distribution channel

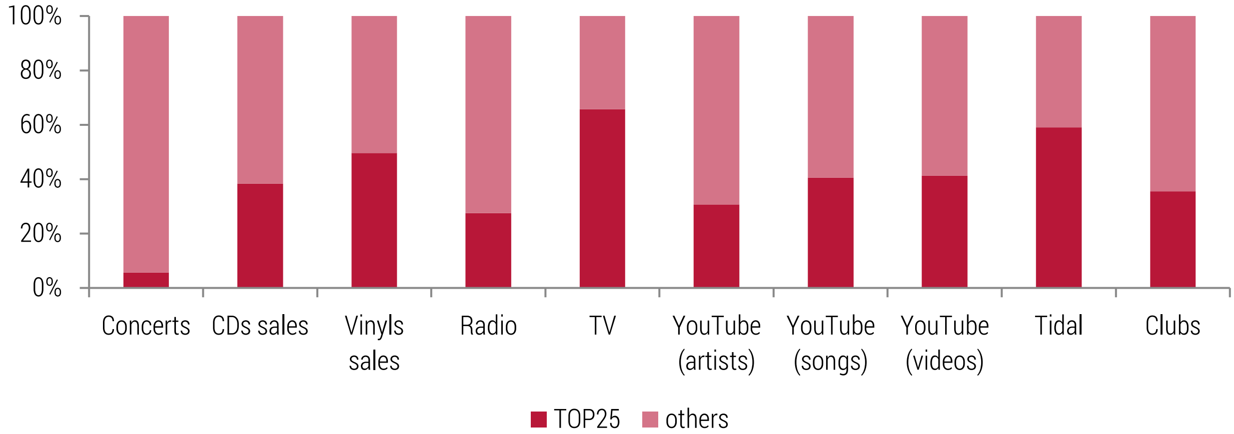


Note: "Albums" stands for artists featured on weekly OLiS CD album charts.
"Other streaming" stands for Tidal, Apple Music (iTunes) and Plus Music
"Other" stands for Classical, Blues/Jazz, Reggae, Electronic and Sung poetry.

Source: own work based on collected data

Most music played on TV (66%) and featured on Tidal charts (59%) was created by TOP25 artists. For obvious reasons, lowest market concentration levels were recorded on the concert market, where TOP25 artists account for a mere 6% of the concerts. Nevertheless, each of the 25 most popular artists on the concert market plays on average 52 concerts a year (the highest ranked artist played more than 96 concerts in 2018).

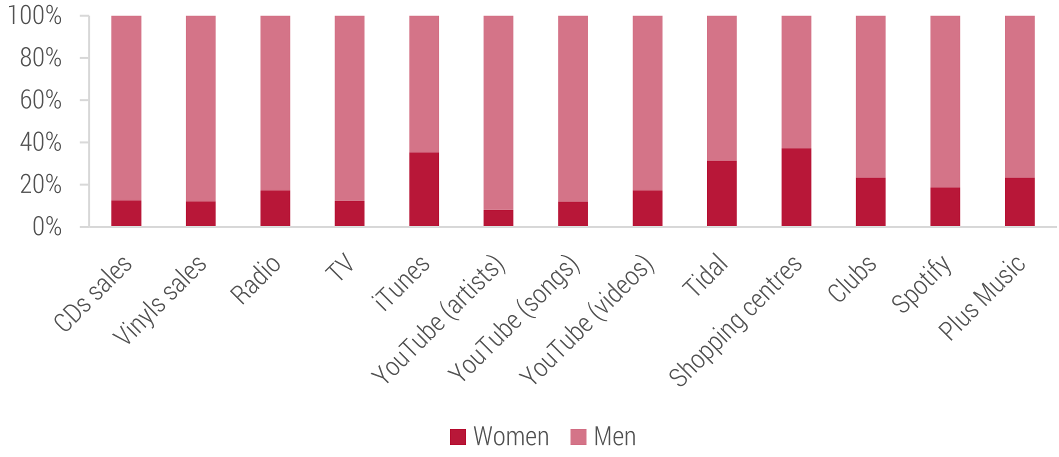
Figure 23. Concentration of TOP25 and other artists by music distribution channel (%)



Source: own work based on collected data

Men represent the largest share of YouTube performers in the Artists category. This may be associated with the fact the category is dominated by hip hop, where male Polish rappers are the most popular. No female rapper appears on the YouTube artist chart, and there is only one woman in the TOP25 ranking in this category – Sylwia Grzeszczak.

Figure 24. Share of women and men among TOP25 artists by music distribution channel (%)

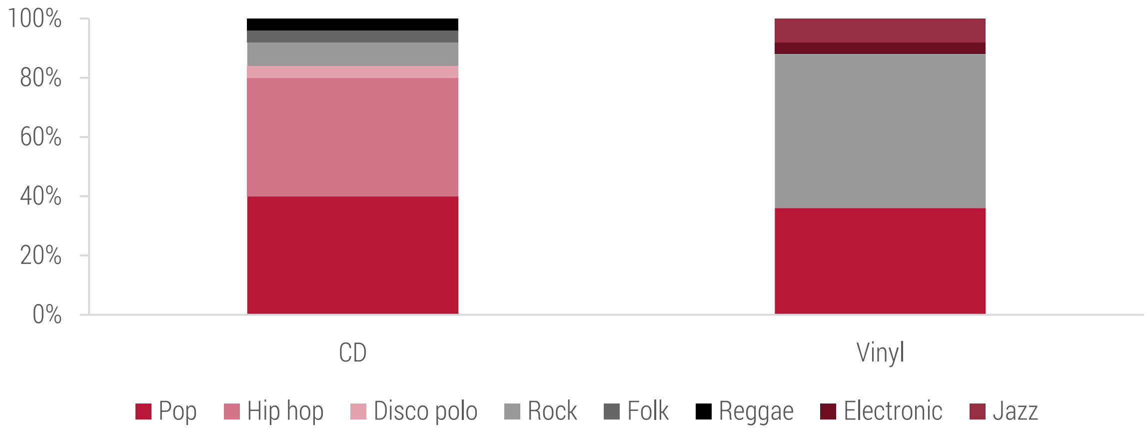


Source: own work based on collected data

2.1. Artist popularity by content distribution channel

Kortez was most often noted on the OLiS charts in 2018. This is the year when two of his records received awards: *Mój dom* (released in 2017) went two-times platinum and *Mini dom* (released in 2018) was granted gold status. *Bumerang*, released in 2016, also ranked high on the charts. A similar pattern may be observed in the case of other artists from the ranking – their success is related to solid sales results recorded for a number of albums released in recent years. Pop artists from the TOP25 chart appeared on weekly OLiS charts more than 500 times in total. In the case of hip hop, this number exceeded 300. This means that out of 25 most popular pop and hip hop artists on the charts, each week an average of 10 and 6 (respectively) were noted on the OLiS charts.

Figure 25. Music genres by TOP25 artists on OLiS in 2018



Source: own work based on ZPAV data

The ranking of best-selling vinyl records in Poland is dominated by foreign artists representing the classical rock genre. These are mostly older bands, often no longer active on the music scene. Apart from three Polish artists, Dawid Podsiadło, Maanam and Kortez, none of the artists appear on any other charts.

Table 11. Ranking of the most popular artists in Poland in terms of their presence on OLiS charts in 2018

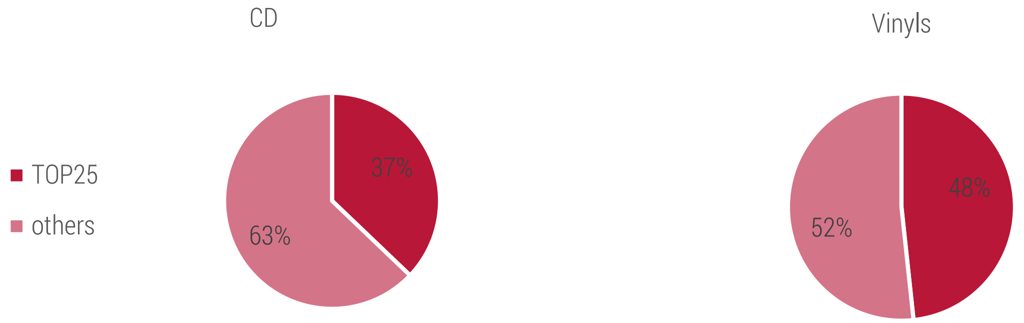
#TOP	CD					Vinyl				
	Artist	Genre	Highest place on OLiS	No. of weeks on OLiS	Country	Artist	Genre	Highest place on OLiS	No. of weeks on OLiS	Country
1	Kortez	Pop	2	113	PL	Pink Floyd	Rock	104	29	UK
2	Zbigniew Wodecki	Pop	17	83	PL	Nirvana	Rock	48	13	USA
3	Taco Hemingway	Hip hop	3	65	PL	Miles Davis	Jazz	39	15	USA
4	O.S.T.R.	Hip hop	2	41	PL	Led Zeppelin	Rock	42	25	UK
5	KęKę	Hip hop	3	39	PL	Amy Winehouse	Pop	38	15	UK
6	Ed Sheeran	Pop	40	51	UK	Deep Purple	Rock	28	27	UK
7	Sławomir	Disco polo	7	33	PL	Jean-Michel Jarre	Electronic	32	28	FR
8	Ania Dąbrowska	Pop	3	37	PL	Guns N' Roses	Rock	27	3	USA
9	Paweł Domagała	Pop	4	33	PL	Dawid Podsiadło	Pop	24	9	PL
10	Paluch	Hip hop	1	33	PL	ABBA	Pop	19	19	SE
11	Imagine Dragons	Rock	10	48	USA	Maanam	Pop	22	21	PL
12	Dawid Podsiadło	Pop	1	43	PL	Krzysztof Komeda	Jazz	28	28	PL
13	Stanisława Celińska	Pop	10	32	PL	Kult	Rock	27	21	PL
14	TACONAFIDE	Hip hop	1	23	PL	Santana	Rock	24	25	USA
15	KALI, FLVWLXSS	Hip hop	1	25	PL	Rage Against The Machine	Rock	22	1	USA
16	Queen	Rock	8	25	UK	Dżem	Rock	19	14	PL
18	HINOL, POLSKA WERSJA	Hip hop	1	23	PL	Budka Suflera	Pop	15	17	PL
19	Krzysztof Zalewski	Pop	33	43	PL	David Bowie	Rock	21	26	UK
20	Quebonafide	Hip hop	1	25	PL	Portishead	Pop	16	25	UK
21	Lao Che	Reggae	1	19	PL	Kortez	Pop	13	14	PL
22	My3	Pop	30	33	PL	Modern Talking	Pop	18	2	DE
23	Sarius	Hip hop	6	19	PL	Dire Straits	Rock	20	17	UK
24	PRO8L3M	Hip hop	1	20	PL	Norah Jones	Pop	15	16	USA
25	Leonard Cohen	Folk	8	13	CA	The Police	Rock	17	29	UK

Note: The table presents the ranking of artists who came 1st in the weekly Official Retail Sales Chart (OLiS), but does not take into account the number of physical formats sold.
The music genres were assigned by Spotify

Source: own work based on ZPAV data (2018)

In all OLiS vinyl charts, as much as 48% of the ranking is occupied by artists from the top 25. A lower degree of concentration is observed in the case of CDs (37% are TOP25 artists).

Figure 26. Share of TOP25 and other artists on weekly OLiS CD and vinyl charts (%)

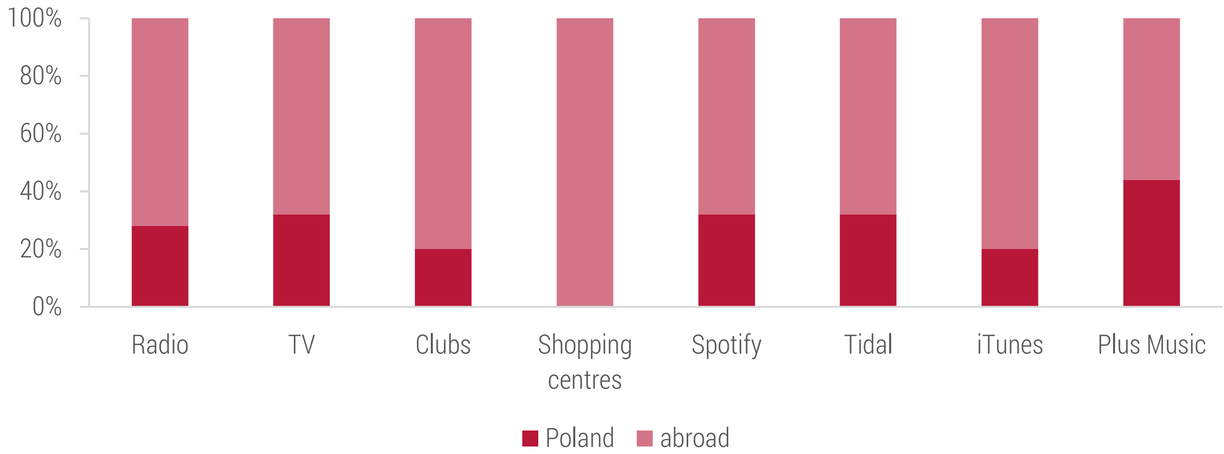


Source: own work based on ZPAV data

The authors have calculated the relative popularity of individual music genres for each music distribution channel and aggregated ranking. This allowed for a coherent scoring method, where a given genre scored higher on a given channel if it was more popular there compared to other channels. The figures presented below show the relative popularity of music genres in individual channels.

In all analysed music distribution channels, the TOP25 artist ranking is dominated by foreign artists.[12] Shopping centres and night clubs most often choose to play foreign music – the ranking of the most popular artists played in shopping centres[13] did not include a single Polish artist. Radio stations, television channels, but also streaming platform users most often reach for music created by foreign authors (Figure 27).

Figure 27. Polish and foreign artists in the TOP25 by music distribution channel in 2018 (%)



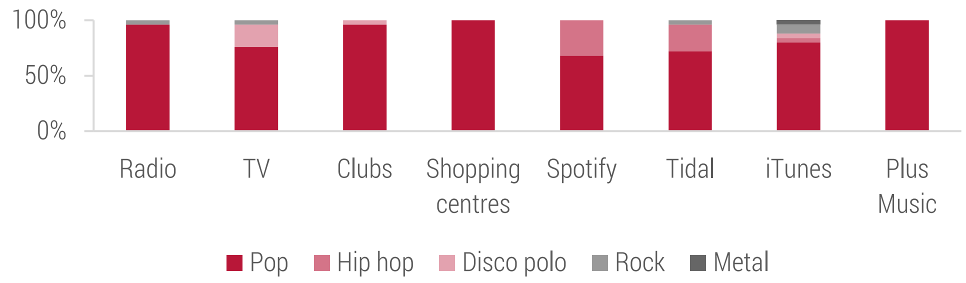
Source: own work based on collected data

[12] YouTube has been analysed separately under item c) of the present chapter.

[13] Data on shopping centres is taken from the latest available ranking published in 2014.

All TOP25 charts are dominated by pop music. In the case of television, the other notable genre is disco polo (Figure 18), which may be correlated with channels dedicated to this type of music (Disco Polo Music, Polo TV), music channels with disco polo programmes and TV shows presenting this genre.

Figure 28. The most popular music genres in the TOP25 by music distribution channel in 2018 (%)

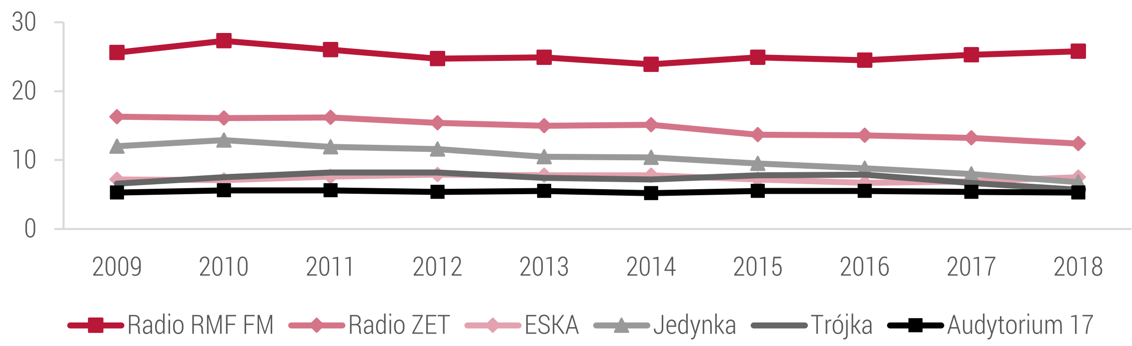


Source: own work based on collected data

Radio and television

The radio's average daily reach in 2018 in the 15-75 age group amounted to 72.4% (21.81 million people; increase by ca. 1 p.p. compared to the previous year). On a weekly basis, the radio reached 91.9% of Poles in 2018 (the corresponding value for 2017 was 91%). Last year the average daily time spent listening to the radio increased by 6 minutes – to 4 hours and 32 minutes. Poles most often listen to the radio in the car (41%), at home (38%) and at work (15%), with the longest time spent listening to the radio while working (almost 6.5 hours) (Wirtualnemedia, 2018a).

Figure 29. Market share of radio stations in 2009–18 (%)



Source: own work based on Wirtualnemedia.pl data

In 2018, channel one (Jedynka) and three (Trójka) of the Polish Radio recorded historically low audience rating levels (in the case of Jedynka, the downward trend has been present since 2010, Trójka has recorded losses in that respect since 2016). In the case of television, out of 18 music channels in Poland, two are dedicated to disco polo and a further four have programmes showcasing this music genre. According to Nielsen Audience Measurement data (Wirtualnemedia.pl, 2018c), all music channels in Poland in total represented a ca. 2% share of the audience, while the two disco polo channels accounted for ca. 1% of the audience.The French band Shanguy was the most popular on the radio and at night clubs, and was relatively often played on TV and downloaded (or streamed) from Plus Music.[14] However, the group is missing from all other TOP25 rankings in the remaining eight music distribution channels. The same may be said about Gromee, who was rated highly on the radio (2), television (1), at night clubs (4), but is absent from the rankings of other most popular artists. Seven artists appeared in the four rankings simultaneously (radio, TV, night clubs, Plus Music).

Table 12. The most popular artists on Polish radio and television in 2018

#TOP	Radio			Television		
	Artist	Genre	Country	Artist	Genre	Country
1	Shanguy	Pop	FR	Gromee	Pop	PL
2	Gromee	Pop	PL	Calvin Harris, Sam Smith	Pop	UK
3	Rita Ora	Pop	UK	Paweł Domagała	Pop	PL
4	Margaret	Pop	PL	Shanguy	Pop	FR
5	Alan Walker	Pop	NO	Extazy	Disco polo	PL
6	Ofenbach vs. Lack Of Afro	Pop	FR / UK	C-BooL	Pop	PL
7	Calvin Harris, Sam Smith	Pop	UK	Luis Fonsi & Demi Lovato	Pop	USA
8	Imagine Dragons	Rock	USA	Playboys	Disco polo	PL
9	Ed Sheeran	Pop	UK	The Prince Karma	Pop	nd.
10	Axwell, Ingrosso	Pop	SE	Rita Ora	Pop	UK
11	C-BooL	Pop	PL	K-391	Pop	NO
12	Dawid Podsiadło	Pop	PL	Alvaro Soler	Pop	ES
13	Selena Gomez x Marshmello	Pop	USA	Sławomir	Disco polo	PL
14	Ania Dąbrowska	Pop	PL	Power Play	Disco polo	PL
15	Lost Frequencies	Pop	BE	Lost Frequencies	Pop	BE
16	Brave	Pop	PL	Nicky Jam	Pop	USA
17	Maroon 5	Pop	USA	Liam Payne & Rita Ora	Pop	UK
18	Rudimental	Pop	UK	Imagine Dragons	Rock	USA
19	Clean Bandit	Pop	UK	Sean Paul & David Guetta	Pop	JM / FR
20	Alvaro Soler	Pop	ES	Camasutra	Disco polo	PL
21	Męskie Granie Orkiestra 2018	Pop	PL	Loud Luxury	Pop	CA
22	Filatov & Karas	Pop	RU	Clean Bandit	Pop	UK
23	Lost Frequencies & Zonderling	Pop	BE / NL	Allj, Feduk	Pop	RU
24	Jax Jones	Pop	UK	Jax Jones	Pop	UK
25	David Guetta & Sia	Pop	FR / AU	Panic! At The Disco	Pop	USA

Note: the music genres were assigned based on Spotify data

Source: own work based on collected data

[14] Detailed information on the most popular artists from this platform is enclosed in the appendix.

Regression model using data from Odsłuchane.eu

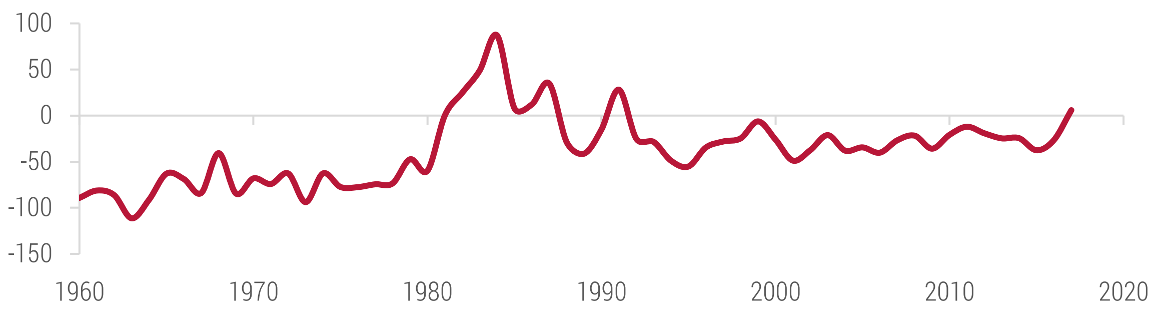
The authors have also relied on data from Odsluchane.eu to analyse what type of tracks are most often broadcast on the radio and television. Collected information allows for a separate analysis of nationwide, local and certain online stations (Newonce, Planeta FM, RMF Dance, RMF Muzyka Filmowa) as well as a few TV channels (4Fun.TV, 4Fun Dance, 4Fun Gold). Data on radio broadcasts has been aggregated with Spotify information on artists and tracks. It was possible to match information concerning ca. 85% out of almost 5 million identified track broadcasts. Next, broadcasts supplemented with information were aggregated to the unique track level, the total identified number of which amounted to over 92,000.

The authors were able to establish which tracks are played most frequently on individual Polish radio stations and TV channels. Radical differences between channels/stations have also been observed. In most of them, the most frequently played tracks include: songs by Polish artists, disco polo songs, most recent songs (released over the last two years) and songs from the 1980s.

Nationwide stations relatively often repeat classical pieces, but current hits are still clearly prevalent (including 2018 hits). Generally speaking, the older a given track, the less frequently it is played (with the exception of songs from the 1980s). 1980s songs are most often played on local radio stations, and music recorded over the last 30 years is repeated there with relatively similar frequency.

While the online stations and TV channels represented on Odsłuchane.eu are not representative of all stations/channels of this type, they still provide an insight into the specific nature of such platforms. The analysed online radio stations mostly play recent dance and film music. Songs by Polish artists appear much less frequently. On the other hand, the TV stations most frequently repeated disco polo and videos from the 1980s.

Figure 30. The frequency of repeating songs from individual years (compared to tracks released in 2018)



Source: own work based on Odsłuchane.eu data

The authors have observed that for all stations, the popularity of a given song on the radio demonstrates a positive correlation with its Spotify popularity. Despite the different nature of these music distribution channels (traditional and modern), Spotify users and radio stations select similar artists. The observed correlation is strongest for online radio stations.

If the values in the table are negative, this indicates a negative correlation, showing that given tracks are played less frequently than those regarded as the "baseline". Figures in the table indicate the scale of correlation, and asterisks the statistical validity. For instance, hip hop tracks are played much less frequently on nationwide radio stations than pop songs (-172.9***), and disco polo songs are played more frequently than pop songs in nationwide radio stations (83.1***). The lack of statistical validity indicates that while the depicted difference is visible compared to average values, owing to the sample size and noisy data it cannot be ruled out that the difference in the given dataset is accidental.

The distinction and the need to distinguish the second category (played tracks apart from all tracks in the sample) results from the dataset including tracks played only on online radio stations (but not on local or nationwide ones). This is why certain tracks are characterised by lack of broadcast – the "played tracks" value indicates the number of tracks with a number of broadcasts other than zero. The employed tobit model takes into account that not all played tracks appear in each of the analysed source types.

Table 13. Tobit regression results on the number of individual track broadcasts by type of station/channel

	Stations/channels				
	Nationwide	Local	Online	TV	Total
Spotify popularity	6.7***	4.0***	12.4***	9.0***	6.2***
Polish artist	156.5***	81.1***	-168.5***	189.4***	102.3***
Genre	Baseline: Pop				
Rock	-28.5***	-38.1***	-280.1***	-125.5***	-66.5***
Metal	-52.9***	-45.0***	-458.8***	-152.5***	-67.1***
Hip hop	-172.9***	-67.8***	-43.4**	-158.3***	-123.2***
Disco polo	83.1***	-3.0	-354.8**	151.5***	12.1*
Sung poetry	23.8**	-49.4***	-2055.2	-193.7***	-47.3***
Reggae	-10.4	8.9	-288.4***	-37.2	7.9
Classical	182.9***	-161.0***	271.8***	-308.9***	-17.9***
Blues or jazz	-12.2***	-46.2***	-115.3***	-186.0***	-56.3***
Electronic	-50.4***	3.1	256.7***	-29.0***	6.0
Other	38.3***	-16.7***	210.4***	40.1***	0.6
Release year	Baseline: 2018				
The 1960s	-83.3***	-29.6***	-119.5	-403.7***	-75.0***
The 1970s	-115.9***	-21.3***	-171.2**	-169.6***	-71.0***
The 1980s	-53.8***	37.1***	-162.2***	30.7***	7.9
The 1990s	-64.1***	12.3***	-55.0*	-9.6	-25.2***
The 2000s	-74.7***	5.8	43.3**	-82.8***	-32.5***
2010	-55.2***	7.4	175.6***	-113.2***	-20.9**
2011	-47.3***	13.4***	196.2***	-22.4	-12.1
2012	-59.9***	13.1***	214.9***	-47.9***	-19.3***
2013	-60.5***	1.3	264.8***	-64.8***	-24.7***
2014	-51.9***	3.0	242.8***	-61.0***	-24.5***
2015	-50.0***	-14.4***	251.8***	-64.8***	-37.7***

*Note: p-value: *** <0.01, ** <0.05, * <0.1.*
The results do not represent the share of individual track types in all broadcasts, but rather show what types of tracks are repeated most frequently.

Source: own work based on Odsłuchane.eu data

Table 13. Tobit regression results on the number of individual track broadcasts by type of station/channel (continued)

	Stations/channels				
	Nationwide	Local	Online	TV	Total
Release year	Baseline: 2018				
2016	-57.6***	-4.9	257.4***	-75.9***	-26.5***
2017	-32.8***	11.3	309.8***	-56.5***	5.9
All tracks in the sample	92,322	92,322	92,322	92,322	92,322
Played tracks	25,973	79,141	2,284	2,971	92,322

*Note: p-value: *** <0.01, ** <0.05, * <0.1.*
The results do not represent the share of individual track types in all broadcasts, but rather show what types of tracks are repeated most frequently.

Source: own work based on Odsłuchane.eu data

Streaming platforms

According to financial statements filed with the National Court Register in 2017, Spotify recorded PLN 2.1 million in sales revenues, PLN 2.43 million in operational costs and PLN 336.6 thousand in losses on sales. In Q3 2018, the company generated USD 1.35 billion in global revenues, i.e. 31% more than the year before. Proceeds from paid subscription increased by 31% to USD 1.21 billion, and proceeds from sales grew by 30% to USD 142 million. The number of active monthly users of the platform surged from 150 to 191 million, out of which the number of Premium users grew from 62 to 87 million and the number of Spotify Free users from 91 to 109 million.

As at the end of October 2018, 40% of Spotify's subscribers were based in Europe, 31% in North America, 20% in South and Central America, and 9% in other parts of the world. The company does not state how many subscribers it has in individual countries (Wirtualnemedia.pl, 2018b). In Poland, the monthly Spotify subscription fee costs PLN 19.99 for individual users and PLN 29.99 for a family package (which may be shared by up to six people).

Table 14. The most popular artists in Poland on Spotify in 2018[15]

#TOP	Artist	Genre	Average monthly plays (thousand)	Fans (thousand)	Country
1	TACONAFIDE	Hip hop	6607.9	445.4	PL
2	Taco Hemingway	Hip hop	3831.6	635.7	PL
3	Dawid Podsiadło	Pop	4230.9	523.4	PL
4	Otsochodzi	Hip hop	1906.8	254.3	PL
5	Bedoes	Hip hop	2083.5	383.0	PL
6	Young Igi	Hip hop	1969.0	247.8	PL
7	Imagine Dragons	Rock	1878.7	21682.2	USA
8	Post Malone	Hip hop	1629.5	17234.6	USA

Note: the music genres were assigned based on Spotify data; Source: own work based on collected data

[15] Placement in the table depends on the 2018 popularity published by Spotify; the number of plays and fans supplements the popularity ranking.

Table 14. The most popular artists in Poland on Spotify in 2018 (continued)

#TOP	Artist	Genre	Average monthly plays (thousand)	Fans (thousand)	Country
9	XXXTENTACION	Hip hop	1649.6	15097.7	USA
10	Quebonafide	Hip hop	1334.4	573.4	PL
11	Dua Lipa	Pop	1401.8	13235.1	UK
12	Ed Sheeran	Pop	1256.8	50525.2	UK
13	Reto	Hip hop	1425.6	341.6	PL
14	Szpaku	Hip hop	1549.2	206.1	PL
15	Ariana Grande	Pop	1530.1	35161.6	USA
16	Guzior	Hip hop	1187.0	117.7	PL
17	Calvin Harris	Pop	1461.9	18072.9	UK
18	David Guetta	Pop	1094.2	19773.2	FR
19	Marshmello	Pop	1035.9	16005.5	USA
20	White 2115	Hip hop	1194.0	400.0	PL
21	Drake	Hip hop	1133.8	30222.0	CA
22	Clean Bandit	Pop	1098.0	12611.6	UK
23	Camila Cabello	Pop	898.6	4375.9	USA
24	Ofenbach	Pop	801.3	13242.1	FR
25	PRO8L3M	Hip hop	788.6	1017.9	PL

Note: the music genres were assigned based on Spotify data

Source: own work based on collected data

An analysis of the most popular songs on Spotify backs the information contained in the top artist chart. Songs by the duo TACONAFIDE appear in the ranking four times. Notably, most of the songs (56%) were recorded by artists performing as a duo. A similar collaborative benefit, described further on in the chapter, was observed in the case of artists that are popular on YouTube.

Table 15. The most popular songs in Poland on Spotify in 2018

#TOP	Artist	Title	Genre	Country
1	TACONAFIDE	Tamagotchi	Hip hop	PL
2	Dawid Podsiadło	Małomiasteczkowy	Pop	PL
3	Męskie Granie Orkiestra 2018	Początek	Pop	PL
4	Dynoro, Gigi D'Agostino	In My Mind	Pop	USA
5	Calvin Harris, Dua Lipa	One Kiss	Pop	UK
6	Dennis Lloyd	Nevermind	Pop	IZ
7	Allj, Feduk	Rozovoye Vino	Pop	RU
8	Dua Lipa	Idgaf	Pop	UK
9	Clean Bandit, Demi Lovato	Solo	Pop	UK / USA

Note: the music genres were assigned based on Spotify data

Source: own work based on collected data

Table 15. The most popular songs in Poland on Spotify in 2018 (continued)

#TOP	Artist	Title	Genre	Country
10	5 Seconds of Summer	Youngblood	Pop	AU
11	Portugal. The Man	Feel It Still	Pop	USA
12	Otsochodzi, Taco Hemingway	Nowy Kolor	Hip hop	PL
13	Post Malone, 21 Savage	Rockstar	Hip hop	USA
14	Ed Sheeran	Shape Of You	Pop	UK
15	TACONAFIDE	Art-B	Hip hop	PL
16	Camila Cabello, Young Thug	Havana	Pop	USA
17	Taco Hemingway	Fiji	Hip hop	PL
18	Otsochodzi	Nie / Nie	Hip hop	PL
19	TACONAFIDE	Kryptowaluty	Hip hop	PL
20	Axwell, Ingrosso	More Than You Know	Pop	SE
21	Bedoes	05:05	Hip hop	PL
22	TACONAFIDE, Bedoes	8 Kobiet - Remix	Hip hop	PL
23	Ariana Grande	No Tears Left To Cry	Pop	USA
24	Marshmello, Anne-Marie	Friends	Pop	USA / UK
25	Tiesto, Dzeko, Preme, Post Malone	Jackie Chan	Pop	NL / USA

Note: the music genres were assigned based on Spotify data

Source: own work based on collected data

Establishing how many people use streaming services is only possible on the basis of media reports, and fully depends on information shared by individual platforms. Correspondingly, Apple Music (iTunes) informed it had 56 million subscribers worldwide in 2018 (Leswing, 2019), while Tidal was said to have 4 million users in 2016. What ought to be mentioned here, however, is that Tidal owners have previously been accused of manipulating data on user numbers and artificially inflating the number of plays tracks get on the platform (Ingham, 2019).

Table 16. The most popular artists in Poland on Tidal and Apple Music (iTunes) in 2018

	Tidal			Apple Music (iTunes)		
#TOP	Artist	Genre	Country	Artist	Genre	Country
1	TACONAFIDE	Hip hop	PL	Ed Sheeran	Pop	UK
2	Taco Hemingway	Hip hop	PL	TACONAFIDE	Hip hop	PL
3	Dawid Podsiadło	Pop	PL	Adele	Pop	UK
4	Ed Sheeran	Pop	UK	Rihanna	Pop	USA
5	Imagine Dragons	Rock	USA	Calvin Harris, Sam Smith	Pop	UK
6	Smolasty	Hip hop	PL	Dawid Podsiadło	Pop	PL
7	Calvin Harris, Sam Smith	Pop	UK	Clean Bandit	Pop	UK
8	Dua Lipa	Pop	UK	Justin Timberlake	Pop	USA
9	Quebonafide	Hip hop	PL	Maroon 5	Pop	USA

Note: the music genres were assigned based on Spotify data

Source: own work based on collected data

Table 16. The most popular artists in Poland on Tidal and Apple Music (iTunes) in 2018 (continued)

	Tidal			Apple Music (iTunes)		
#TOP	Artist	Genre	Country	Artist	Genre	Country
10	Margaret	Pop	PL	Avicii	Pop	SE
11	XXXTENTACION	Hip hop	USA	Sia	Pop	AU
12	Męskie Granie Orkiestra 2018	Pop	PL	Metallica	Metal	USA
13	Clean Bandit	Pop	UK	Ariana Grande	Pop	USA
14	Post Malone, 21 Savage	Hip hop	USA	Duke Dumont	Pop	UK
15	Jax Jones, Ina Wroldsen	Pop	UK / NO	Coldplay	Pop	UK
16	Dynoro, Gigi D'Agostino	Pop	LT / IT	P!nk	Pop	USA
17	Marshmello, Anne-Marie	Pop	USA / UK	Kings of Leon	Rock	USA
18	David Guetta, Sia	Pop	FR / AU	C-Bool	Pop	PL
19	Liam Payne, Rita Ora	Pop	UK	Lenny Kravitz	rock	USA
20	Paweł Domagała	Pop	PL	Sławomir	disco polo	PL
21	Camila Cabello, Young Thug	Pop	USA	Rita Ora	Pop	UK
22	Rita Ora	Pop	UK	Nicki Minaj	Pop	USA
23	Kygo, Selena Gomez	Pop	NO / USA	Calvin Harris	Pop	UK
24	Maroon 5, Cardi B	Pop	USA	Męskie Granie Orkiestra 2018	Pop	PL
25	Ariana Grande	Pop	USA	David Guetta & Sia	Pop	FR / AU

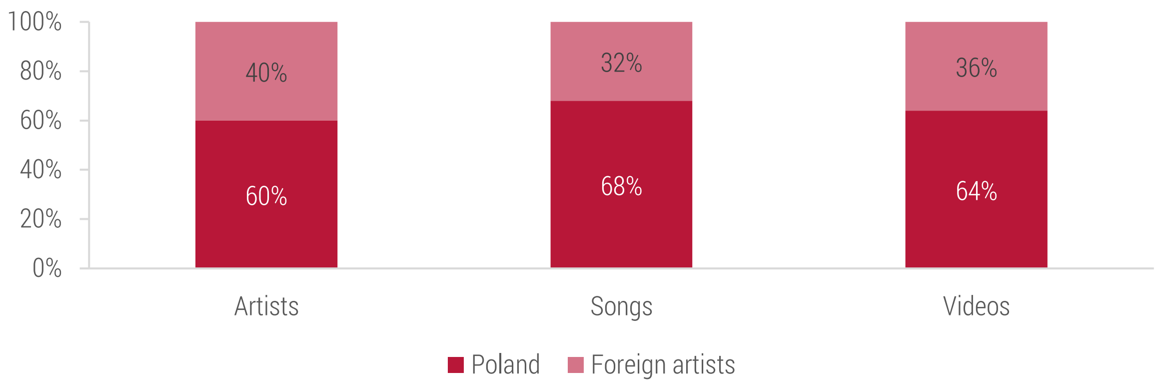
Note: the music genres were assigned based on Spotify data

Source: own work based on collected data

2.2. YouTube

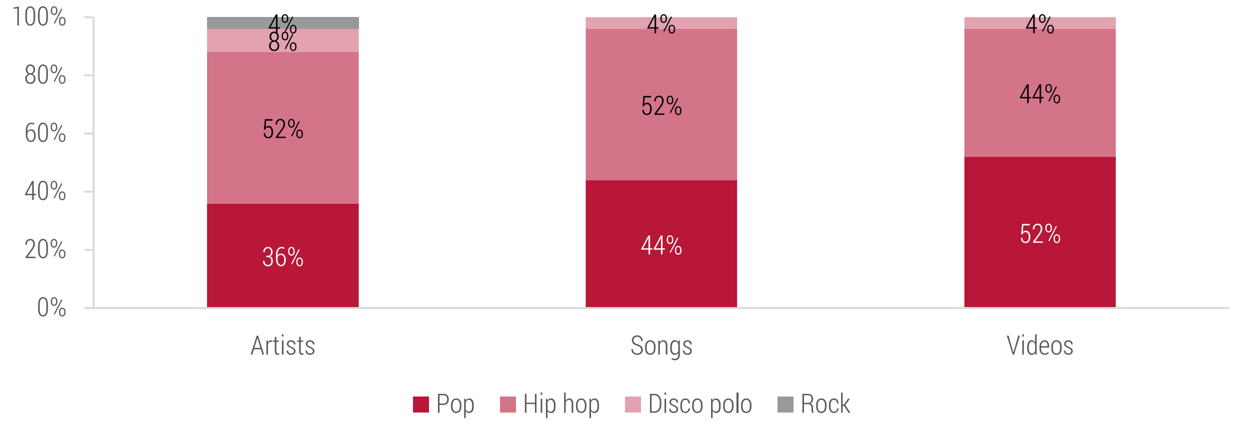
YouTube is analysed separately from other distribution channels for three important reasons. First, all three YouTube distribution channels are characterised by the domination of Polish artists (at the average rate of over 60%), which is different than other distribution channels. Second, pop music ranked first on only one of the three channels (Videos), with hip hop leading in the other two. This feature sets YouTube apart from the remaining distribution channels, where pop music is the most popular genre.

Figure 31. Polish and foreign artists in the TOP25 according to YouTube rankings in 2018 (%)



Source: own work based on collected data

Figure 32. The most popular music genres in Poland's TOP25 on YouTube in 2018 (%)



Source: own work based on collected data

It may be inferred that the collaborative nature of Polish hip hop could have a positive impact on both sales results and the number of views.[16] The most popular artists on YouTube charts, ReTo and Blacha, are rappers represented by the same record label: NewBadLabel. The subsequent six rappers on the charts are also released by three record labels (two each).

Table 17. Selected data on Polish hip hop artists[17]

Record label	Views on YouTube (million)	Sales certifications until 2018			Artist	YouTube (TOP25 rank)			
		Diamond	Platinum	Gold		Artists	Songs	Videos	Views (million)
NewBadLabel	225.4	0	1	1	ReTo	1	3	2	128.2
					Blacha	3	2	1	114
B.O.R. Records (B.O.R. Crew)	177.3	0	6	4	Paluch	4	11	12	133.1
					Szpaku	17	1	4	150.6
QueQuality	192	0	4	1	Quebonafide	6	42	33	90.7
					Guzior	11	5	3	75.6
SBM Label (SB Maffija)	225.4	0	1	3	Białas	13	152	80	67.7
					White 2115	23	6	5	60
Ganja Mafia Label	41.6	1	5	6	Kali	46	16	13	53.9
Antihype	56.2	0	0	2	Sarius	28	7	7	68.8

Note: views stated in the table concern the Artists category

Source: own work based on collected data

[16] Preliminary results obtained by McKenzie et al. (2019) based on data from Spotify USA rankings indicate that tracks featuring another artist fare much better on the charts than other tracks. This would confirm the intuitive belief that collaboration between artists may improve their results.

[17] Values for individual artists and record labels differ owing to the manner of reporting data by the platform; detailed information is included in the methodological appendix to the report.

Figures concerning the number of views cover only the year 2018. This means that the highest ranked Polish artists recorded more than 100 million views in a single year. The most popular genre, in terms of artists and channels alike, is Polish hip hop. In 2018, hip hop accounted for the vast majority of views (more than 70% on average) in each YouTube category.

Table 18. Ranking of the most popular artists and channels in Poland on YouTube in 2018[18]

#TOP	Artists				Channels			
	Artist	Genre	Views (million)	Country	Artist	Genre	Views (million)	Country
1	ReTo	Hip hop	128.2	PL	SBM Label	Hip hop	111.4	PL
2	Ed Sheeran	Pop	105.1	UK	NewBadLabel	Hip hop	89.6	PL
3	BLACHA	Hip hop	114.0	PL	QueQuality	Hip hop	88.8	PL
4	Paluch	Hip hop	133.1	PL	BORCREW OFFICIAL	Hip hop	89.7	PL
5	Alan Walker	Pop	95.0	NO	Disco Polo Lajf	Disco polo	54.5	PL
6	Quebonafide	Hip hop	90.7	PL	#GM2LTV	Hip hop	52.2	PL
7	David Guetta	Pop	76.7	FR	RENESANS	Hip hop	45.5	PL
8	Imagine Dragons	Rock	79.5	USA	Lemon Records	Disco polo	70.2	PL
9	Ariana Grande	Pop	73.1	USA	ANTIHYPE	Hip hop	38.5	PL
10	Kortez	Pop	81.4	PL	Young Igi	Hip hop	35.3	PL
11	Guzior	Hip hop	75.6	PL	Feduk	Pop	41.3	RU
12	Sylwia Grzeszczak	Pop	62.1	PL	AsfaltRecords	Hip hop	36.9	PL
13	Białas	Hip hop	67.7	PL	Smolasty	Hip hop	35.3	PL
14	Verba	Pop	57.9	PL	Łobuzy TV	Disco polo	33.8	PL
15	Feduk	Hip hop	77.0	RU	KaliGanjaMafia	Hip hop	34.4	PL
16	Akcent	Disco polo	54.4	PL	Ariana Grande	Pop	31.0	USA
17	Szpaku	Hip hop	150.6	PL	ProstoTV	Hip hop	32.6	PL
18	Lil Peep	Hip hop	53.1	USA	Maroon 5	Pop	30.7	USA
19	Pawel Domagała	Pop	73.4	PL	Kortez Oficjalny Kanał	Pop	40.8	PL
20	Sławomir	Disco polo	66.6	PL	David Guetta	Pop	28.5	FR
21	Smolasty	Hip hop	57.2	PL	Komodo	Pop	28.8	PL

Source: own work based on collected data

Note: the music genres were assigned based on Spotify data

[18] Placement in the ranking depends on the popularity on YouTube charts; the number of views is provided as auxiliary information.

Table 18. Ranking of the most popular artists and channels in Poland on YouTube in 2018 (continued)

#TOP	Artists				Channels			
	Artist	Genre	Artist	Genre	Artist	Genre	Artist	Genre
22	XXXTentacion	Hip hop	56.1	USA	Kubi Producent	Hip hop	27.6	PL
23	White 2115	Hip hop	60.0	PL	Alan Walker	Pop	26.6	NO
24	Maroon 5	Pop	48.9	USA	Rita Ora	Pop	25.9	UK
25	Lil Pump	Hip hop	52.5	USA	chillwagon	Hip hop	29.6	PL

Note: the music genres were assigned based on Spotify data

Source: own work based on collected data

The 25 most popular songs in Poland in 2018 recorded a total of 1.2 billion views. Polish hip hop accounted for 80% of them (over 900 million). A similar trend was observed in the ranking of videos, where 75% (around 750 million) of almost a billion total views concerned videos made by Polish artists. Polish hip hop ranked first in both the song and video chart.

Table 19. Ranking of the most popular songs in Poland on YouTube in 2018

#TOP	Songs				Videos			
	Artist	Genre	Views (million)	Country	Artist	Genre	Views (million)	Country
1	Szpaku	Hip hop	111.4	PL	BLACHA	Hip hop	96.1	PL
2	BLACHA	Hip hop	89.6	PL	ReTo	Hip hop	95.1	PL
3	ReTo	Hip hop	88.8	PL	Guzior	Hip hop	58.8	PL
4	TACONAFIDE	Hip hop	89.7	PL	Szpaku	Hip hop	63.5	PL
5	Guzior	Hip hop	54.5`	PL	White 2115	Hip hop	60.3	PL
6	White 2115	Hip hop	52.2	PL	TACONAFIDE	Hip hop	55.3	PL
7	Sarius	Hip hop	45.5	PL	Sarius	Hip hop	42.7	PL
8	Paweł Domagała	Pop	70.2	PL	Smolasty	Hip hop	38.0	PL
9	Smolasty	Hip hop	38.5	PL	TOP GIRLS	Disco polo	35.6	PL
10	Maroon 5	Pop	35.3	USA	Allj & Feduk	Pop	55.6	RU
11	Paluch	Hip hop	41.3	PL	Maroon 5	Pop	32.4	USA
12	Margaret	Pop	36.9	PL	KALI x PALUCH	Hip hop	33.8	PL
13	Top Girls	Disco polo	35.3	PL	Malik Montana x Dio Mudara	Hip hop	29.8	PL
14	Armin van Buuren	Pop	33.8	NL	K-391 & Alan Walker	Pop	25.0	NO

Note: the music genres were assigned based on Spotify data

Source: own work based on collected data

Table 19. Ranking of the most popular songs in Poland on YouTube in 2018 (continued)

Songs					Videos			
#TOP	Artist	Genre	Views (million)	Country	Artist	Genre	Views (million)	Country
15	Young Igi	Hip hop	34.4	PL	Bedoes & Kubi Producent	Hip hop	33.9	PL
16	Kali, Flvwlxss	Hip hop	31.0	PL	Alan Walker	Pop	24.1	NO
17	Dawid Podsiadło	Pop	32.6	PL	Kortez	Pop	23.0	PL
18	Ariana Grande	Pop	30.7	USA	Clean Bandit	Pop	28.6	UK
19	Feduk	Hip hop	40.8	RU	Dawid Podsiadło	Pop	27.0	PL
20	Ed Sheeran	Pop	28.5	UK	Margaret	Pop	27.2	PL
21	Taco Hemingway	Hip hop	28.8	PL	Ed Sheeran	Pop	20.2	UK
22	K-391	Pop	27.6	NO	Komodo	Pop	21.4	PL
23	Calvin Harris	Pop	26.6	UK	Ariana Grande	Pop	22.9	USA
24	Alan Walker	Pop	25.9	NO	BLR x Rave & Crave	Pop	18.1	UK
25	Męskie Granie Orkiestra 2018	Pop	29.6	PL	Rita Ora	Pop	20.9	UK

Note: the music genres were assigned based on Spotify data

Source: own work based on collected data

YouTube forms part of the music synchronisation market. In 2016–17, it paid more than USD 1 billion to phonographic companies around the world in exchange for rights to publish music on the platform. Seen from this perspective, YouTube's role in shaping the global music market is invaluable. In 2017, for instance, about a half of Americans listened to music on YouTube at least once a week – this is more than the number of users of every other streaming platform (Krueger, 2019). Unfortunately, only scant data on users and their preferences is available, which makes it difficult to make any estimates concerning Poland.

The song and video charts (Tables 20) complement the ranking described in Table 19. For instance, ReTo's popularity results most of all from his two songs: "Ua" and "Sorry Dolores" (67 million views in total). The vast majority of artists in the chart owe their popularity to single tracks (only three artists – ReTo, BLACHA and TACONAFIDE – appear in the ranking more than once).

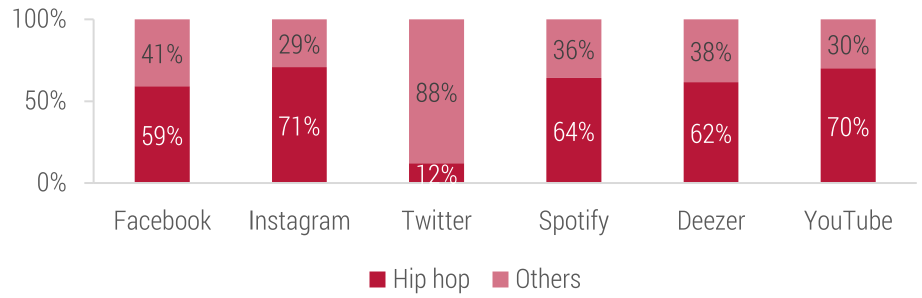
In recent years, YouTube has also attracted criticism owing to the relatively low royalties it offers to artists for playing their tracks. According to 2017 IFPI data, in 2015 Spotify paid record labels an average of USD 20 per each listener, while the corresponding YouTube amount was less than 1 dollar. This is one of the reasons why YouTube has recently become part of a debate concerning the new directive on copyright and related rights introduced in the European Union. One of the foundations of the legal act in question is making streaming platforms liable for content uploaded by their users. For YouTube, this means the platform will have to introduce restrictive solutions that enforce automated verification whether or not music in the service is played with the appropriate authorisation. Partly in response to the service being increasingly used as a music player, YouTube has recently introduced a subscription plan enabling, for instance, playing tracks on smartphones even if YouTube is minimised or the screen is locked.

2.3. Social media

The authors have created a list of 21 Polish artists who are relatively popular on all music distribution channels in Poland. The list, compiled in alphabetical order, encompasses only solo artists (duos and bands have been omitted).

- Hip hop artists have a larger following on all social media apart from Twitter. However, Twitter is used relatively rarely by Polish artists; only Dawid Podsiadło and Margaret may boast a significant fanbase here (over 25,000 and over 8,500 followers, respectively).

Figure 33. The most popular Polish artists on social media in 2018

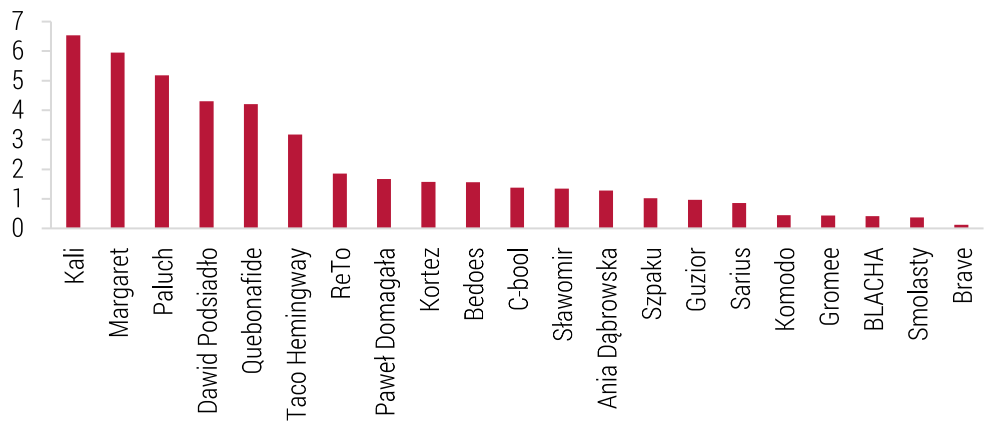


Note: in the case of artists publishing on the same YouTube channel, their fans were only counted once.

Source: own work

- Younger artists have more fans on Instagram, older musicians on Facebook.
- Margaret is the most popular artist on Instagram and ranks second in terms of the number of Facebook followers.
- In total, all artists have 5 million fans on Instagram and 4.5 million fans on Facebook.

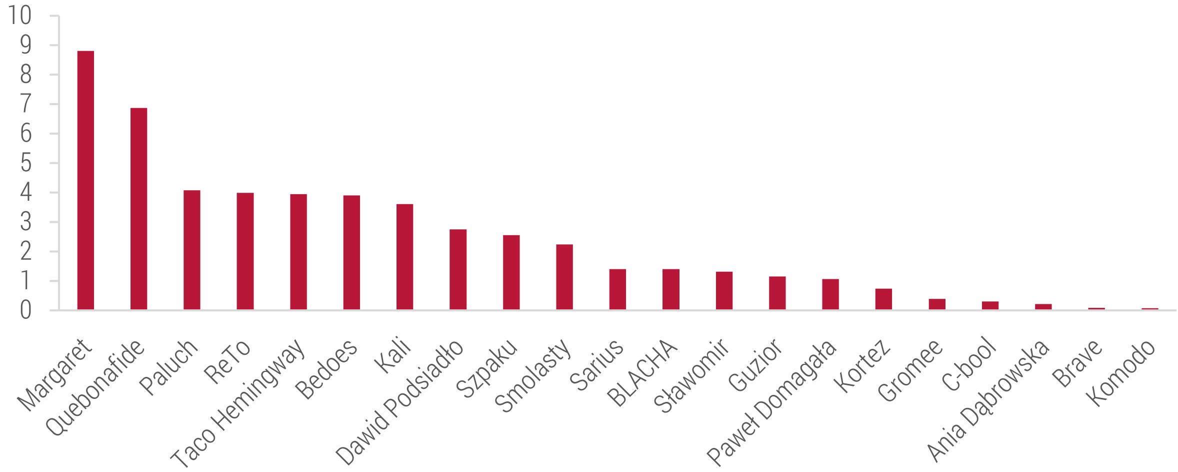
Figure 34. The number of fans on Facebook (in 100,000) in 2018



Source: own work based on collected data

Data as at 06 Aug 2019

Figure 35. The number of fans on Instagram (in 100,000) in 2018



Data as at 06 Aug 2019

Source: own work based on collected data

- There are six artists with more than 300,000 fans on Facebook and a further nine with a fanbase exceeding 100,000.
- In terms of Instagram, two artists are clearly more popular than others (Margaret and Quebonafide with 800,000 and 700,000 followers respectively). The profiles of subsequent artists are followed by no more than 400,000 fans.

3. Concert market

Methodological note

In this report, the authors have conducted the first comprehensive analysis of the Polish concert market to date. No similar analysis has been done so far for various reasons, for instance because data regarding concerts and musical events in Poland is not collected and publicised in a continuous, full and comprehensive manner at the national level. Therefore, the Polish concert market has not until now been subjected to a complete and comprehensive review, while the relevant maintained and available records are fragmentary. This means that there is no ready, available database that would enable a comprehensive analysis. The authors have based the analysis on data obtained from several complementary sources, including a dataset prepared specifically for the project (Table 21). The following study can serve as the first step in creating and improving the methodology of concert market research in Poland.

Table 20. Data included in the work

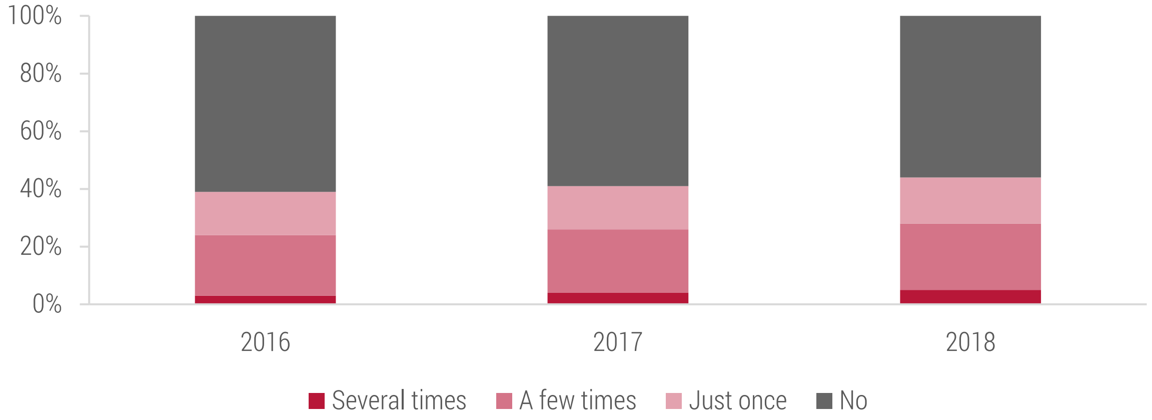
Source	Data range	Method of obtaining data	Nature of data
Coigdzie	Comprehensive	Data provided for the purposes of the project	Statistical data on individual concerts (including the date, location, performer, music genre, ticket prices). The database contained information about approximately 201,000 concerts from 2016-18. Extensive and comprehensive data on the Polish concert market was provided to the research team voluntarily and free of charge for the purposes of this study.
Koncertomania	Comprehensive	Data collected using automated online data collection tools	The data covers all concerts and music events catalogued on the Koncertomania website, which aggregates information about music events in Poland.
ZAiKS	Fragmentary	Data provided for the purposes of the project	Data on license agreements (and resulting proceeds) concluded by ZAiKS with concert organisers.
GUS, BDL	Fragmentary	Publicly available data and data provided for the purposes of the project	Data regularly reported by entities required to do so (in this case: organisers of mass-scale events; philharmonics, orchestras and choirs, as well as cultural centres). The data only includes information collected using the Statistics Poland [GUS] forms K-01, K-07, K-09. Also, the data is subject to statistical confidentiality.
Modeor Foundation	Fragmentary	Publicly available data	Data collected under a grant from the Ministry of Culture and National Heritage, relating to classical music concerts and containing a very detailed description of the activities of musical institutions organising classical music concerts (philharmonics, orchestras and choirs), including information on the number of concerts, their types.

Source: Own work

3.1. Concert attendance

Each year sees the percentage of Poles declaring they have attended a concert in the last 12 months grow – from 39% in 2016 to 44% in 2018. Most concert-goers are people who go to concerts a few times a year. The group of people who attend concerts more often than that is relatively small.

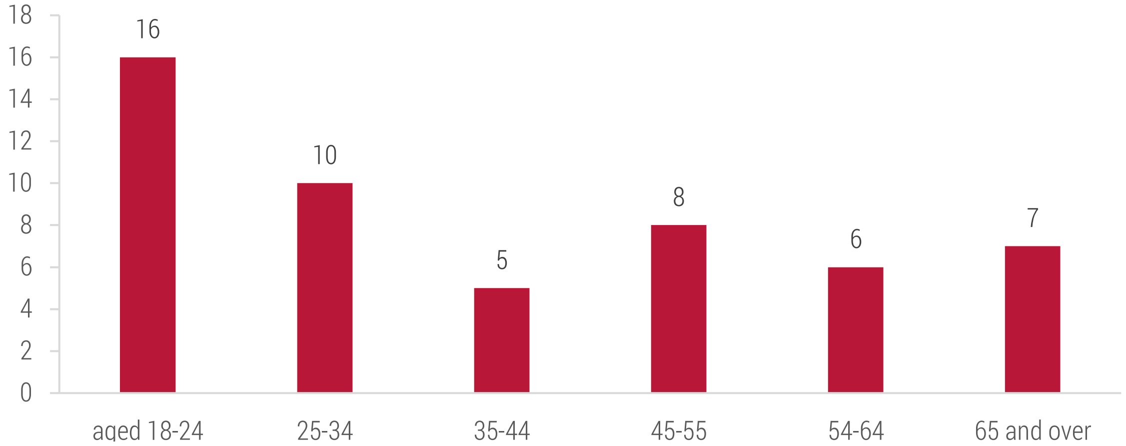
Figure 36. Concert attendance of Poles in 2016-18



Source: Own work based on "Doświadczenia i aktywność Polaków" [Experiences and activities of Poles] (CBOS, 2017, 2018, 2019).

Only 8% of respondents pointed to concerts as their main source of music.[19] This answer was most often given by young people. The share of attending concerts as the most common way of listening to music falls with age and reaches the lowest value in the 35-44 age group. After that a relative increase in the percentage can be observed in the oldest age groups.

Figure 37. Concerts as the most frequently chosen source for listening to music (%)



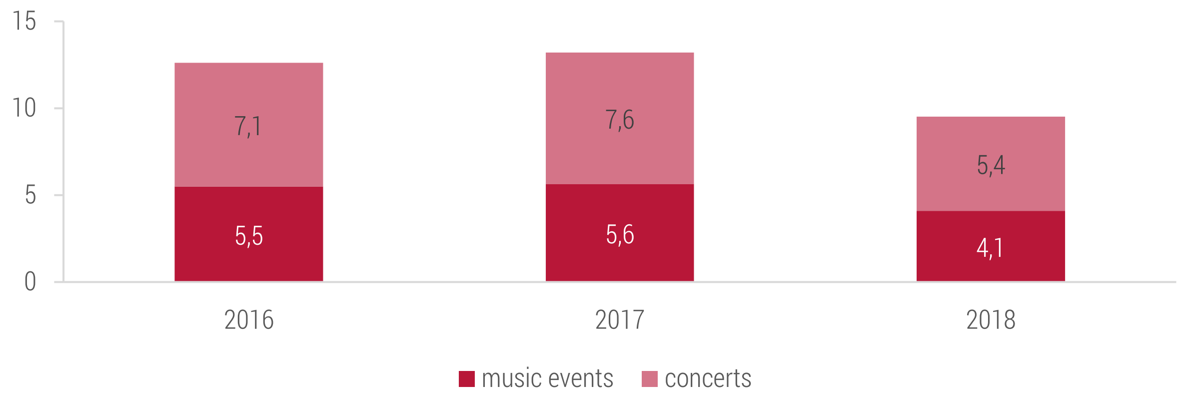
Source: Own work based on "Słuchanie muzyki" [Listening to music] (CBOS, 2018)

19 Respondents were asked about when they listen to music most often and the prevalent answers (three options could be chosen) were: at home (86%); when travelling to work or school (30%), during a long journey (20%) and at work (20%). Concerts overtook night clubs as the main place of listening to music (2% of indications).

3.2. Number of concerts in Poland

Based on data from the Coigdzie.pl® website, over 150,000 music events and 200,000 concerts took place in Poland in the 2016-18 period. Starting with 2016, a steady decline in events recorded on the website can be observed, which is a result of changes made to the Coigdzie.pl® website, not in the concert market itself (change by approx. 24 p.p. when comparing 2018 to 2016).

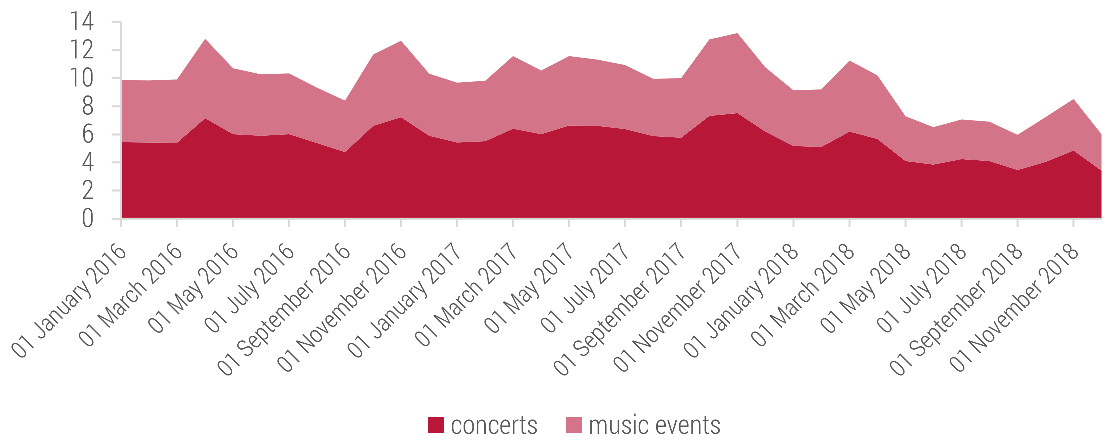
Figure 38. Number of music events and concerts in Poland[20] (in 10,000)



Source: Own work based on concert market data provided by Coigdzie.pl® - event database and repertoire.

In the 2016–18 period, the greatest number of concerts and music events was held in April and November. This may be stem from the fact that music festivals in Poland are organised mainly in the summer – most music festivals in 2018 were held in July.

Figure 39. Number of music events and concerts in Poland broken down by month (2016-18)

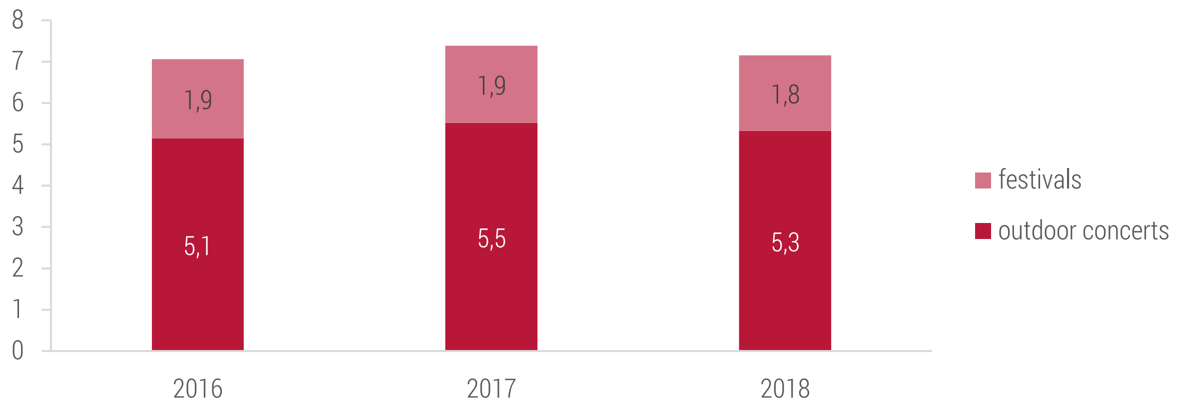


Source: Own work based on concert market data provided by Coigdzie.pl® - event database and repertoire.

[20] The distinction between music events and individual concerts in the concert market observed within this study applies only to lists prepared on the basis of data provided by Coigdzie.pl®. The following terminology has been used: “concert” – a single performance by one artist/band; “music event” – a continuous music event that may consist of several individual concerts of different artists considered as a whole.

The general fall in the number of concerts (although not so pronounced) is also reflected in the number of concerts reported to ZAiKS. Outdoor concerts constitute the vast majority of events recorded by ZAiKS (about 70%).

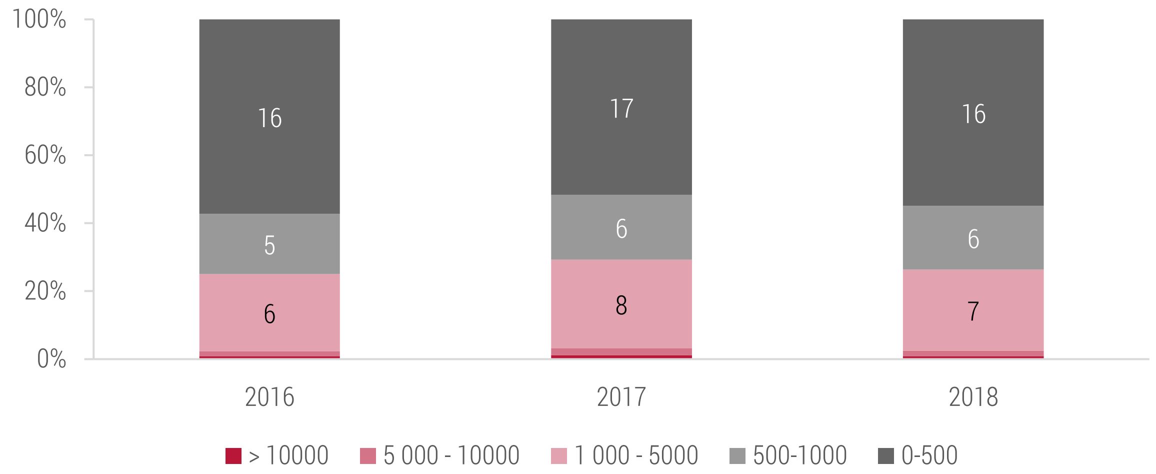
Figure 40. Number of stage concerts according to ZAiKS (in thousands) in 2016-18



Source: Own work based on ZAiKS data

More than half of the concerts taking place in 2016–18 are small concerts, with rights revenues not exceeding PLN 500.[21] Concerts with rights revenues exceeding PLN 10,000 are the least numerous – only 1% (less than 300 concerts).

Figure 41. Distribution of concerts by rights revenues in events registered by ZAiKS (%)



Source: Own work based on ZAiKS data

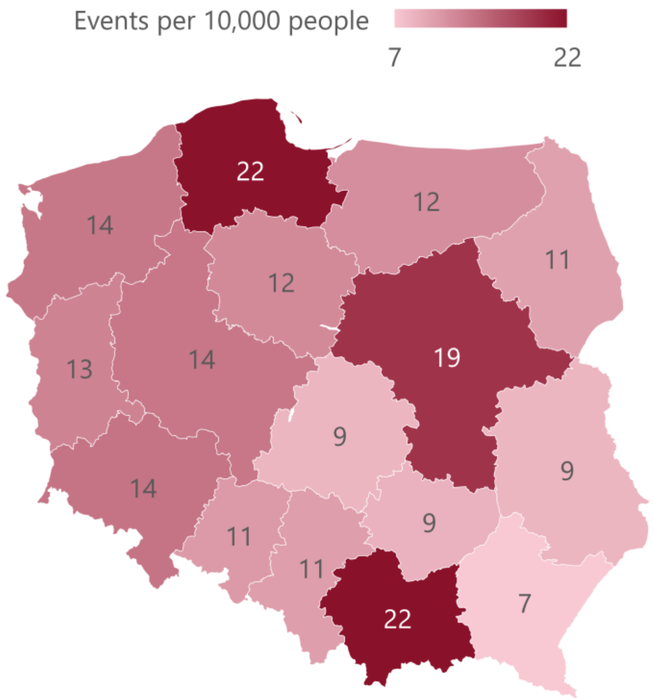
[21] Rights revenues are the only value aggregated by ZAiKS that makes it possible to indirectly establish the size of the music event. This type of revenue is determined based on the following criteria: number of event participants, revenue from ticket sales and tickets transferred to other entities, remuneration of all performers. Source: Table of rights revenue rates of the ZAiKS Authors' Association.

https://zaiks.org.pl/pliki/256/Tabela_za_publiczne_wykonania_utwor%C3%B3w_podczas_wyst%C4%99p%C3%B3w_estradowych%20_W-ES.pdf

In each analysed year, the greatest number of concerts took place in the Mazowieckie Voivodeship. In 2018, almost one fifth of the total number of concerts was organised there. For the most part, the structure of the concert market in the analysed period has remained unchanged (with the shares of individual voivodeships changing by 1-2 p.p.). The only significant change was the decreased share of the concert market in the Mazowieckie Voivodeship, which, after an initial increase from 24% in 2016 to 26% in 2017, dropped and accounted for 19% of the entire concert market in 2018.

After calculating a concerts held/number of inhabitants ratio, the geographical structure of the organised events changes, as the greatest number of concert organised per capita is in the Małopolskie and Pomorskie Voivodeships. The Mazowieckie Voivodeship drops to third place. This means that the relatively larger number of concerts does not necessarily go hand in hand with their high availability for voivodeship inhabitants.

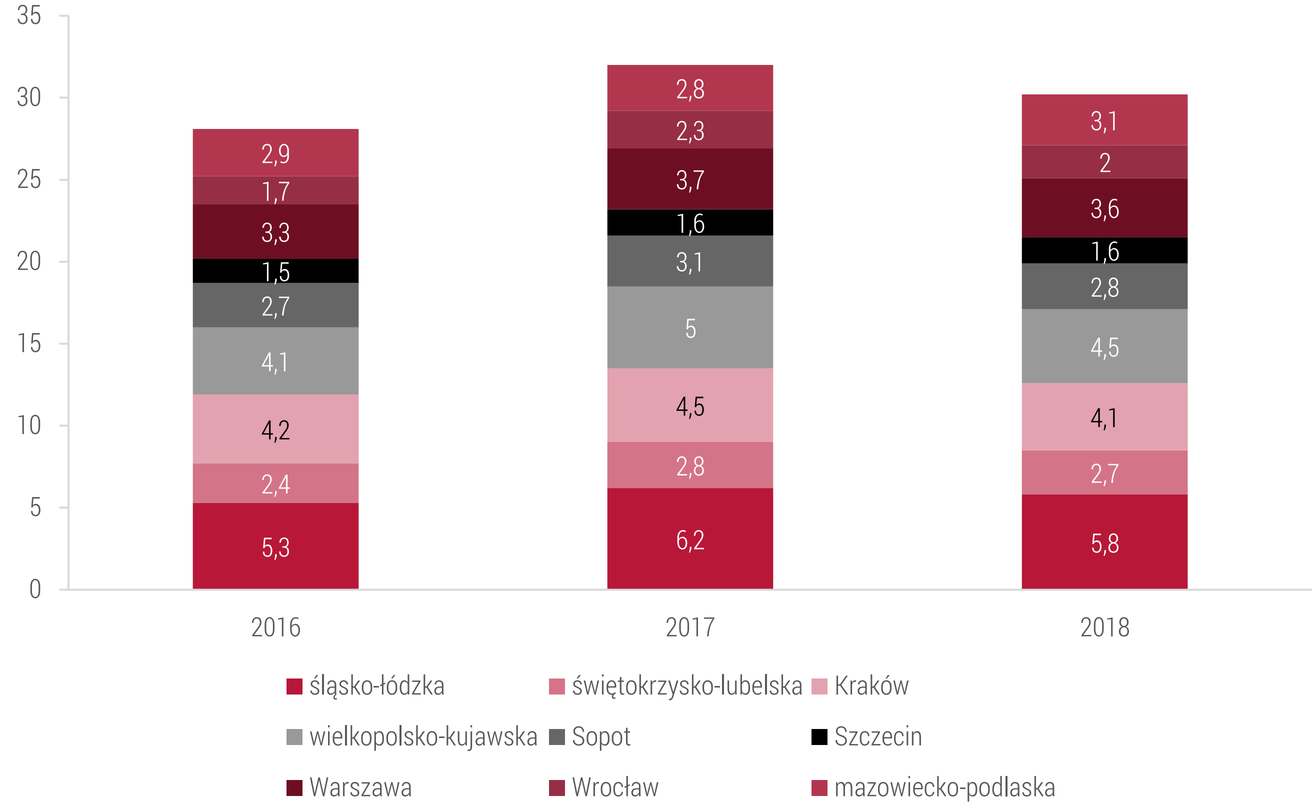
Figure 42. Events per 10,000 people in 2018



Source: Own work based on concert market data provided by Coigdzie.pl® - event database and repertoire.

The structure of concerts reported annually to ZAiKS demonstrates greater stability – changes in subsequent years do not exceed 1 p.p. From this perspective, the changes observed in the Coigdzie.pl® database for the Mazowieckie Voivodeship are absent. The regional ZAiKS authorities with the largest share in the concert market (measured by the number of reported concerts) are as follows: Łódź-Silesia, Greater Polakd-Kujawy, Kraków and Warsaw, which is in line with information from other sources.

Figure 43. Number of concerts reported to regional ZAiKS authorities[22] (in thousands)

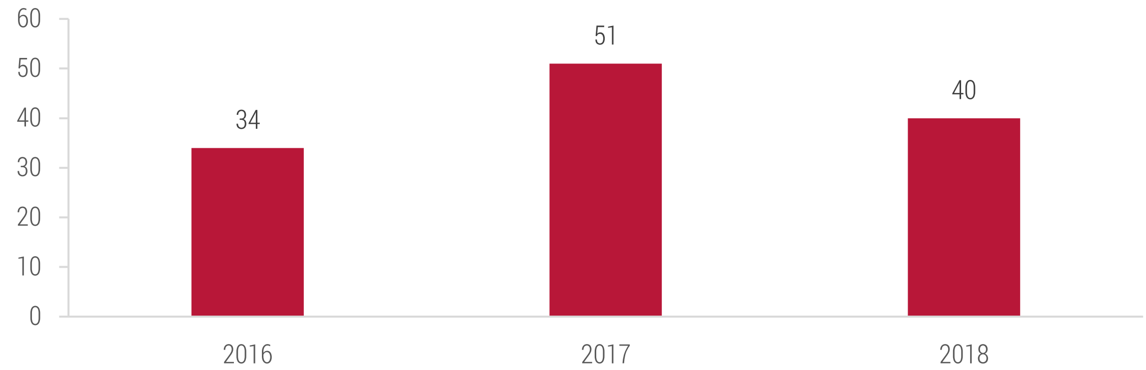


Source: Own work based on ZAiKS data.

3.3. Value of concerts in Poland

Data from ZAiKS represents the only nationwide financial data for the concert market. In the analysed period, ZAiKS saw revenues from licenses granted totalling almost PLN 125 million.

Figure 44. ZAiKS revenue – stage music (in PLN million)

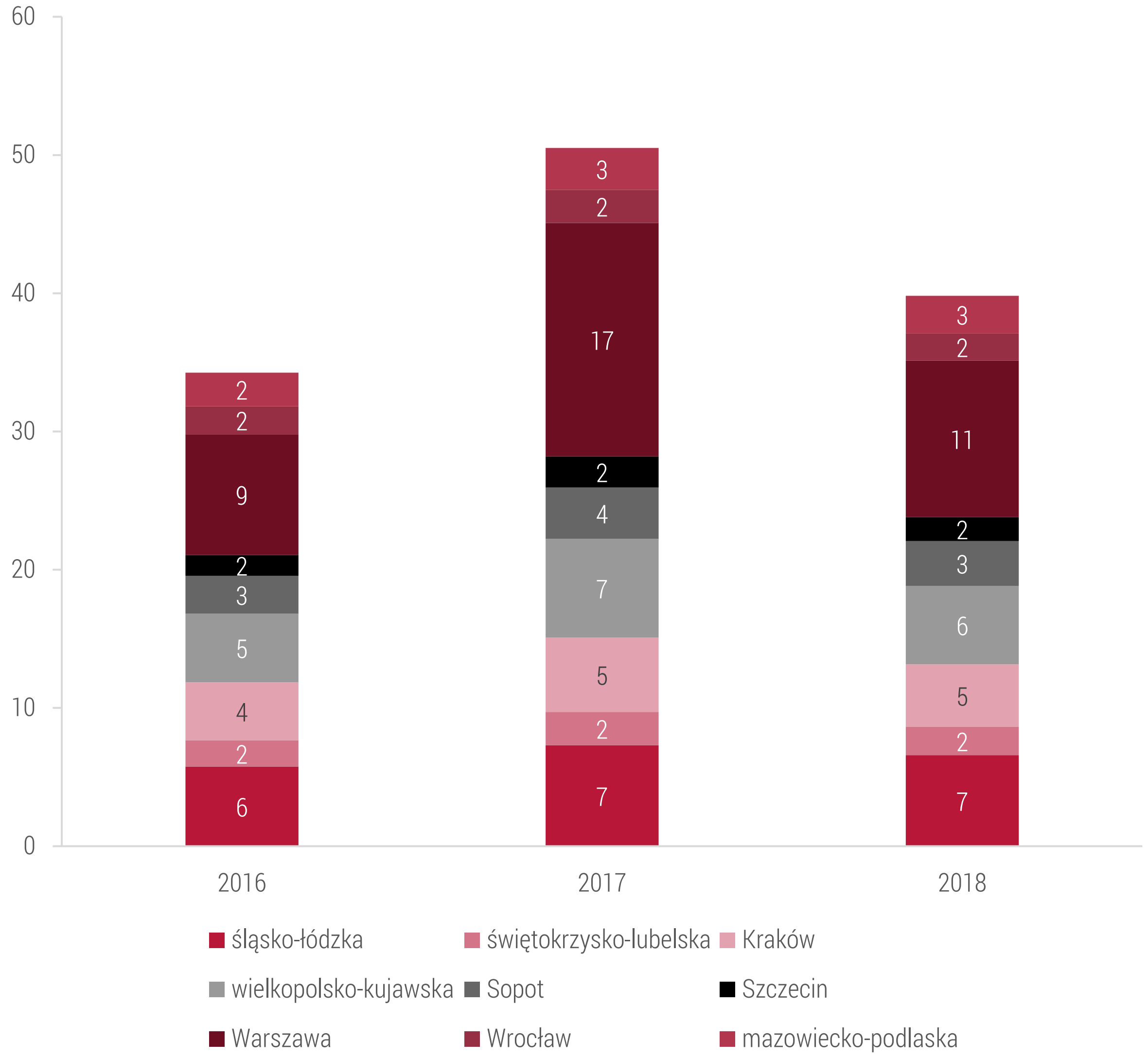


Source: Own work based on ZAiKS data.

[22] The field activities of ZAiKS are based on a division into 9 regional authorities and are not closely aligned with the territorial division of the country. A complete list is in appendix.

The Warsaw Regional Authority recorded the highest revenues (PLN 11 million in 2018), even though it came fourth in terms of the number of organised concerts. This means that mainly large music events are organised in Warsaw, which is further confirmed by the geographical analysis of events in terms of rights revenues. In 2018, almost 80 concerts with the highest level of rights revenues (over PLN 10,000) were organised in Warsaw, while the Świętokrzyskie-Lublin Regional Authority saw only three. The Świętokrzyskie-Lublin Regional Authority is also the smallest in terms of concert revenues.

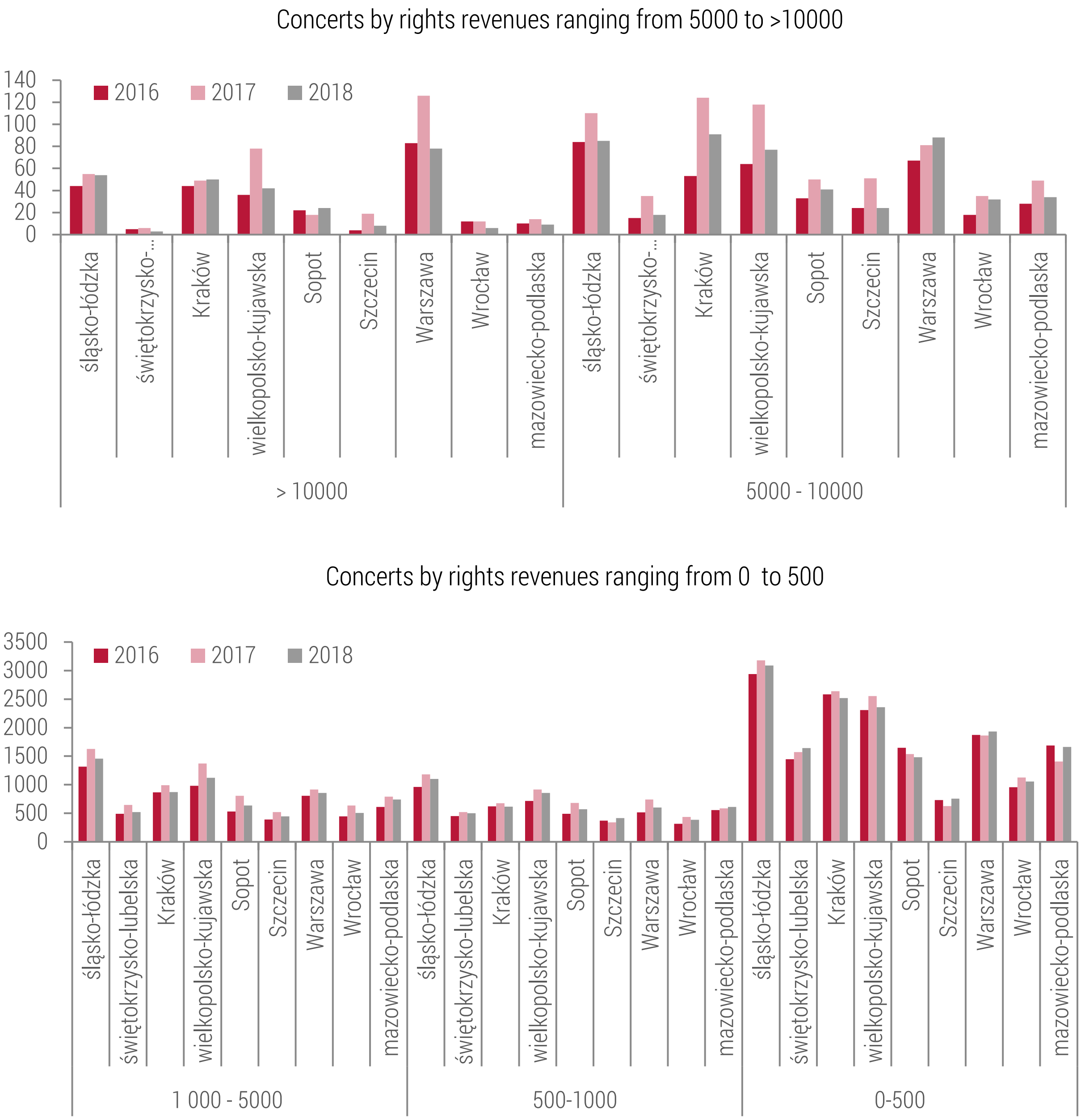
Figure 45. Concert revenues registered with Regional Authorities of ZAiKS in 2016-18 (in millions).



Source: Own work based on ZAiKS data

When broken down by individual Regional Authorities of ZAiKS, a relatively constant size structure of concerts (measured by rights revenues) can be observed. The largest concerts (with revenues exceeding PLN 10,000) are the exception, with proportionally more reported in Warsaw, while the smallest number in proportion to other concerts is in the Świętokrzyskie-Lublin, Szczecin and Wrocław Regional Authorities. However, the largest number of the smallest concerts (up to PLN 500) were conducted in the Silesia-Łódź ans Kraków Regional Authorities (more than 3,000 and 2,500 concerts, respectively). The Szczecin Regional Authority noted the smallest number in each revenue range.

Figure 46. Concert size structure by Regional Authority in 2018



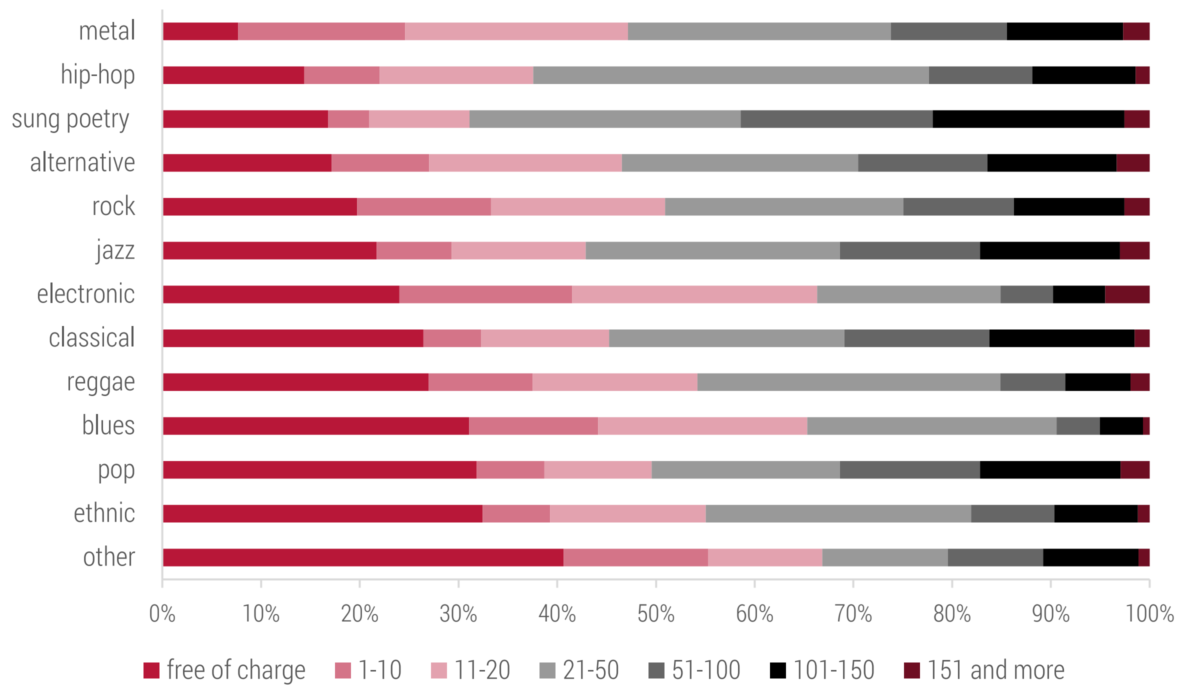
Source: Own work based on ZAiKS data

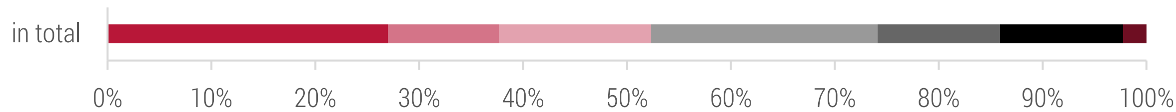
Difficulties in estimating the concert market value by means of existing data analysis, which are a result of the lack of access to the music industry's financial data, are discussed in the "methodological note". Financial data related to the concert market is mostly confidential and not made public in any way, even in summary form. In this situation, information on the ticket price structure seems particularly interesting. Almost a third of all concerts in Poland are non-ticketed events with free admission. Among the remaining ones, music events requiring no more than PLN 50 represent the majority. More expensive tickets, above PLN 150, account for a small percentage of tickets in all music genres.[23]

[23] Data from the Coigdzie.pl® website. The website aggregates ticket prices based on the lowest prices for a given concert.

- The majority of ethnic, pop and blues concerts are non-ticketed;
- Metal concerts are free of charge the least often;
- Tickets for sung poetry concerts usually cost more than PLN 50;
- Compared to other genres, tickets to electronic music concerts more frequently cost more than PLN 150.

Figure 47. Structure of ticket prices by genre (in 2016-18)





Note: The list uses the lowest normal ticket price.

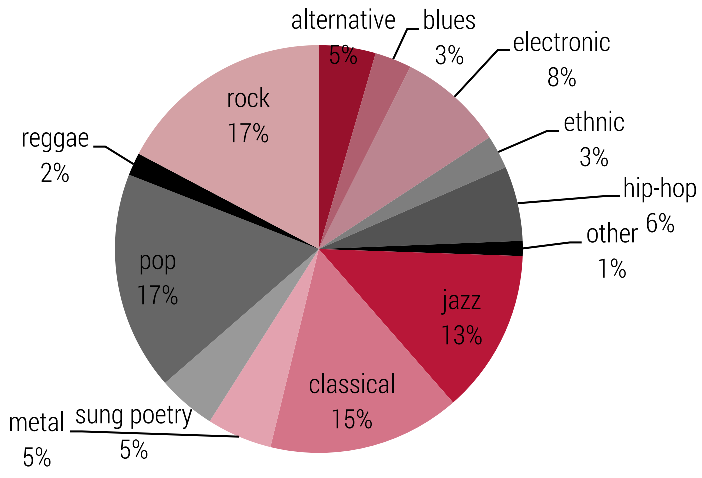
Source: Own work based on concert market data provided by Coigdzie.pl® - event database and repertoire.

3.4. Music genres

The concert market is the most diverse music distribution channel in Poland in terms of music genres. This is confirmed by data from the Coigdzie.pl® and Koncertomania.pl websites. Based on data from these two sources, the author were able to conclude that sung poetry (poetic song) and electronic music, i.e. genres less popular on radio, television, streaming websites, YouTube and in terms of physical sales, are decidedly more popular in the case of concerts. Nevertheless, the majority of concerts in Poland are pop,[24] rock, classical and jazz concerts, together accounting for 62% of the concert market.

[24] The Coigdzie.pl® database counts disco polo artists among other genres (usually pop), which renders a detailed analysis of the concert market in Poland difficult. Analysis of Koncertomania.pl data makes it possible to fill in information about disco polo concerts (page 43).

Figure 48. Structure of the concert market by music genres – summary for 2016-2018

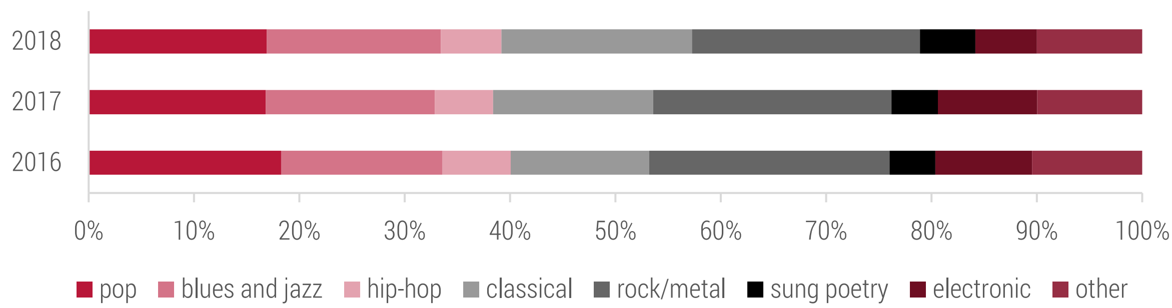


Note: The list has been prepared only on the basis of concerts that could be successfully assigned a genre (149,819 concerts, which accounted for 75% of all recorded events).

Source: Own work based on concert market data provided by Coigdzie.pl® - event database and repertoire

When analysing the popularity structure of individual music genres (measured by the annual number of concerts) on the Polish concert market over the analysed period, the greatest changes occurred in classical music concerts, whose share grew in subsequent years.

Figure 49. Structure of the concert market by music genres – breakdown into individual years



Note: The list has been prepared only on the basis of concerts that could be successfully assigned a genre (149,819 concerts, which accounted for 75% of all recorded events).

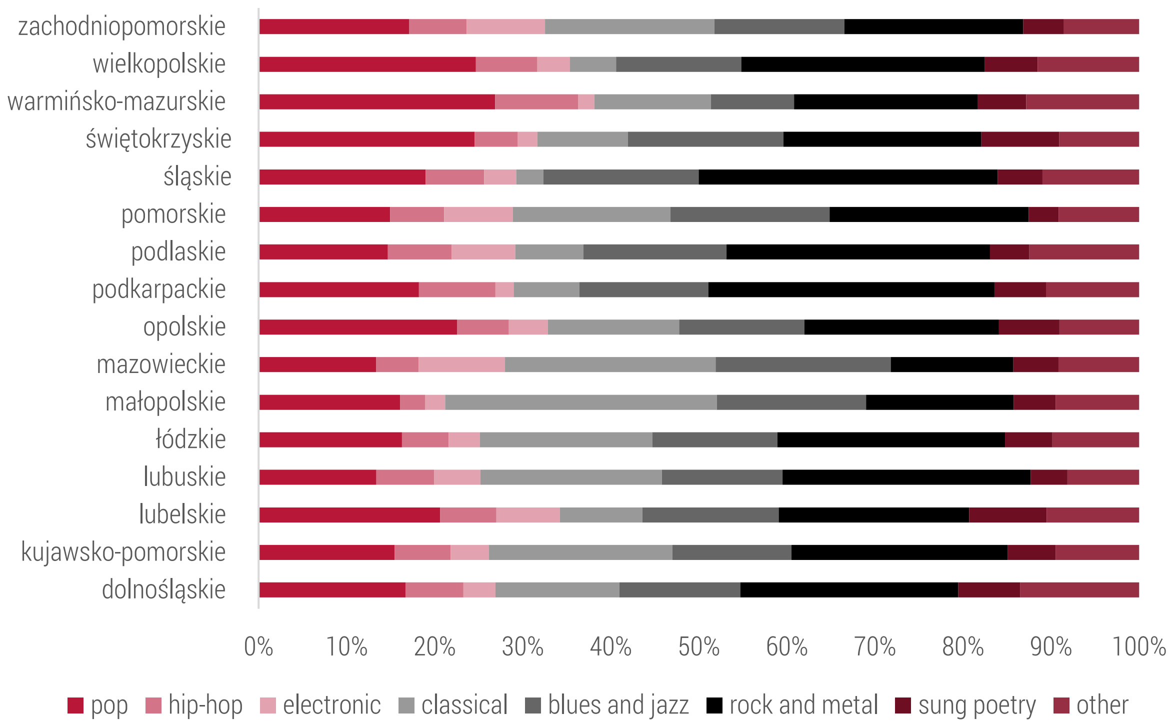
Source: Own work based on concert market data provided by Coigdzie.pl® - event database and repertoire

Differences in the popularity of various music genres in individual parts of the country and changes in this respect over subsequent years covered by the analysis can also be observed:

- The share of classical music concerts in all concerts organised in the Śląskie Voivodeship fell in 2018, despite an increase at the national level during the same period.
- There is a higher percentage of blues concerts in the Mazowieckie Voivodeship than in other voivodeships.

- In the Małopolskie Voivodeship, classical music concerts have a larger share than in the country as a whole, while it is lower than average in the Podkarpackie and Podlaskie Voivodeships, for example.
- In the Mazowieckie Voivodeship, electronic music is more popular (based on the number of concerts) than in other voivodeships, although this genre's share in all concerts held in the voivodeship has been decreasing over subsequent years.
- A significant number of concerts of other, generally less popular genres in the Mazowieckie Voivodeship leads to a decreasing share of the most popular genres, such as pop and rock, in the concert market.
- Differences are also palpable in the share of jazz concerts in different voivodeships, which are proportionately most popular in the Mazowieckie Voivodeship and least popular in Podlaskie.

Figure 50. Geographical structure of the concert market by music genres – in 2018.



Source: Own work based on concert market data provided by Coigdzie.pl® - event database and repertoire.

The most popular artists on the Polish concert market include representatives of the most popular music genres in the country, although sung poetry is overrepresented relative to its overall popularity as a genre. The following made the top ten in all three years: Cisza Jak Ta, Teresa Werner, Stare Dobre Małżeństwo, O.S.T.R. and Witold Wilczek. In addition to the concert market, some artists (Sławomir, Teresa Werner, Kortez, O.S.T.R.) are also listed on other charts (described in other sections of the report). The remaining artists in the table are only popular on the concert market.

The limitation of the Coigdzie.pl® database is that it lacks the disco polo genre. That is why some artists (Akcent, Sławomir) have been assigned other music genres (pop, rock). Based on the information in the database, we are also unable to determine the number of concert participants.

Table 21. List of the most popular artists in Poland in terms of the number of concerts registered in Coigdzie.pl® database in 2018[25]

# TOP	2016			2017			2018		
	Artist	Genre	No.	Artist	Genre	No.	Artist	Genre	No.
1	Akcent	Pop	132	Teresa Werner	Pop	144	Sławomir	Rock	99
2	Cisza Jak Ta	Sung poetry	108	Over The Under	Metal	110	Teresa Werner	Pop	97
3	Teresa Werner	Pop	98	Tede (TDF)	Hip hop	105	Maciej Maleńczuk	Rock	97
4	Piękni i Młodzi	Pop	97	Witold Wilczek	Classical	102	Kortez	Pop	91
5	Baciary	Pop	93	Cisza Jak Ta	Sung poetry	101	Farben Lehre	Rock	90
6	Tede (TDF)	Hip hop	92	Galitzyaner Klezmorim	Ethnic	100	Cisza Jak Ta	Sung poetry	88
7	Farben Lehre	Rock	89	Piękni i Młodzi	Pop	93	Witold Wilczek	Classical	82
8	Stare Dobre Małżeństwo	Sung poetry	88	Stare Dobre Małżeństwo	Sung poetry	90	Stare Dobre Małżeństwo	Sung poetry	82
9	O.S.T.R.	Hip hop	87	O.S.T.R.	Hip hop	84	O.S.T.R.	Hip hop	74
10	Witold Wilczek	Classical	87	Akcent	Pop	82	Michał Bajor	Sung poetry	72

Note: The "No." value is the number of concerts in the year registered in the database. The list excludes institutional performers (e.g. philharmonics, music colleges), which are discussed in the next table.

Source: Own work based on concert market data provided by Coigdzie.pl® - event database and repertoire.

Most concerts registered in the Coigdzie.pl® database concern institutional performers. These are predominantly institutions offering classical music: philharmonics, choirs, orchestras, music academies, etc. Even institutions from the bottom of the 2018 list (such as the Szczecin Philharmonic) played more concerts than Sławomir, who came top on the popular music ranking.

Table 22. Ranking of the most popular institutional performers in Poland in terms of the number of concerts played

# TOP	2016		2017		2018	
	Name	No.	Name	No.	Name	No.
1	Royal Chamber Orchestra	474	Royal Chamber Orchestra	455	Royal Chamber Orchestra	405
2	Orkiestra Zdrojowa (Spa Orchestra)	210	Time for Chopin	357	Orkiestra Zdrojowa (Spa Orchestra)	218

Note: The "No." value is the number of concerts in the year registered in the database.

Source: Own work based on concert market data provided by Coigdzie.pl® - event database and repertoire.

[25] Music genres were assigned as per information from the Coigdzie.pl® website.

Table 22. Ranking of the most popular institutional performers in Poland in terms of the number of concerts played (continued)

# TOP	2016		2017		2018	
	Name	No.	Name	No.	Name	No.
3	Music Academy in Łódź	209	Music Academy in Łódź	219	St Maurice Chamber Orchestra	172
4	Time for Chopin	156	Orkiestra Zdrojowa (Spa Orchestra)	205	Chopin Concerts	162
5	Smykofonia	144	Smykofonia	205	Polish Baltic Philharmonic	158
6	Polish Baltic Philharmonic	136	Polish Baltic Philharmonic	172	Music Academy in Łódź	154
7	National Philharmonic Orchestra	135	Szczecin Philharmonic	140	Time for Chopin	133
8	Music Academy in Gdańsk	129	Pomeranian Philharmonic	140	Pomeranian Philharmonic	128
9	Szczecin Philharmonic	127	Music Academy in Gdańsk	125	National Philharmonic Orchestra	113
10	Pomeranian Philharmonic	126	Polish Radio National Symphony Orchestra in Katowice (NOSPR)	119	Szczecin Philharmonic	110

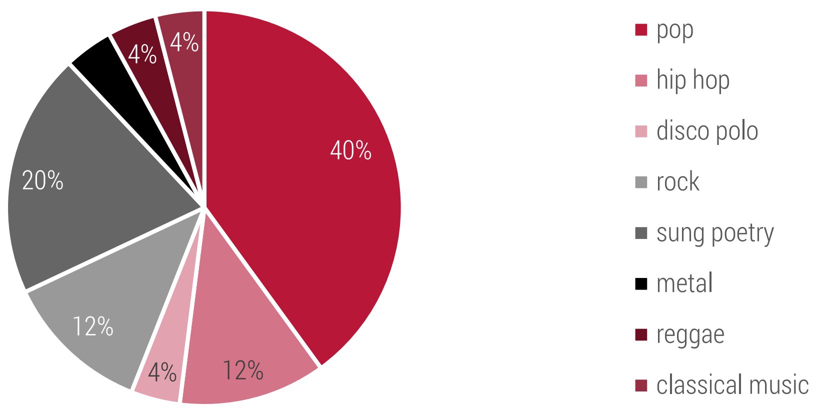
Note: The "No." value is the number of concerts in the year registered in the database.

Source: Own work based on concert market data provided by Coigdzie.pl® - event database and repertoire.

To supplement the Coigdzie.pl® database, the authors have decided to also rely on data from Koncertomania.pl. The latter database contains fewer records (ca. 27,000 events in 2018), but enables to separate disco polo from the wider pop genre, allowing for a more exact analysis of the concert market.

An analysis of Koncertomania.pl data has confirmed the authors' previous conclusions: that the concert market in Poland is most diverse in terms of the popularity of music genres compared to other rankings contained in the report. The list features as many as eight music genres, two out of which (sung poetry, classical music) do not appear in any previous rankings. What is more, sung poetry is the second most popular music genre (after pop music), and features on the most popular artist chart five times, i.e. more frequently than hip hop and rock.

Figure 51. TOP25 artists on the concert market by music genre in 2018 (%)



Source: own work based on Koncertomania.pl data

Like other sources concerning the concert market, the Koncertomania.pl database comes with its own set of limitations. It does not feature all events (as shown by discrepancies in the number of concerts recorded on Koncertomania.pl and Coigdzie.pl®), so some genres may be over- or underrepresented. The database enables to paint an approximate picture of the concert market in Poland by music genre, but should not be treated as an exhaustive source of knowledge on the subject.

Table 23. Ranking of the most popular artists in Poland in terms of the number of concerts registered in Koncertomania in 2018

#TOP	Artist	Genre	No. of concerts registered in the database
1	Kortez, Panieneczki	Pop	95
2	Teresa Werner, Rico Sanchez	Pop	94
3	Maciej Maleńczuk	Pop	88
4	Koncert Wiedeński	Classical	77
5	Stare Dobre Małżeństwo	Sung poetry	66
6	Cisza Jak Ta	Sung poetry	62
7	Sławomir	Disco polo	60
8	Kult, Ten Years After, Norman Beaker, Chris Farlowe	Rock	57
9	Raz Dwa Trzy	Sung poetry	56
10	Czesław Śpiewa	Pop	55
11	Mikromusic, Skubas, Sonbird	Pop	51

The music genres were assigned by Spotify

Source: own work based on Koncertomania.pl data

Table 23. Ranking of the most popular artists in Poland in terms of the number of concerts registered in Koncertomania in 2018 (continued)

#TOP	Artist	Genre	No. of concerts registered in the database
12	Sylwia Grzeszczak, MEZO	Pop	48
13	Krzysztof Zalewski, Paulina Przybysz, Natalia Przybysz	Pop	47
14 15	Michał Bajor	Sung poetry	46
	Lao Che, Transsexdisco	Reggae	
16	QUEBONAFIDE, Taconafide	Hip hop	45
17	O.S.T.R., Kuban, Sarius, Fresh N Dope	Hip hop	44
18	Dj Frodo, Smolasty	Hip hop	42
19	Cree, Sebastian Riedel	Rock	39
20 21	Ania Dąbrowska	Pop	38
	Hunter, Ziemia Zakazana	Metal	
22 23 24	Nocny Kochanek, Snowblind	Pop	36
	Piwnica Pod Baranami	Sung poetry	
	Michał Szpak	Pop	
25	Lady Pank	Rock	35

The music genres were assigned by Spotify

Source: own work based on Koncertomania.pl data

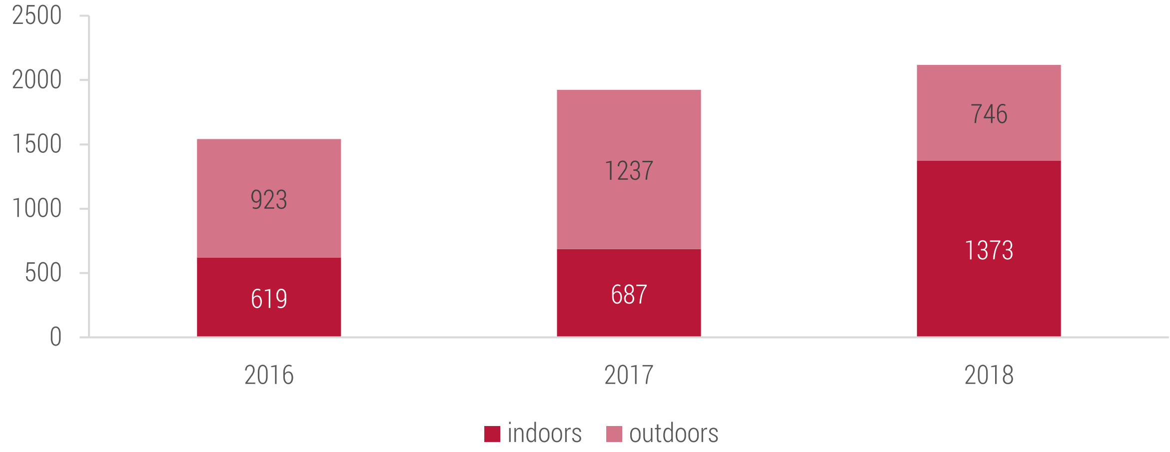
3.5. Mass-scale concerts and festivals

Mass-scale concerts[26] represent a specific type of concerts. The number of such cultural events in Poland is growing by the year. In the analysed period, an increase from 1,500 to more than 2,000 mass-scale concerts a year was observed. Most of them take place outdoors – around 60% in 2016 and around 65% in 2017 and 2018.[27]

[26] For concerts taking place at sports halls or in other buildings, the figures are: 500 participants for a safe event and 200 participants for a high risk event; for concerts taking place at stadiums or in other facilities (other than buildings), the figures are: 1,000 participants for a safe event and 300 participants for a high risk event (Act of 20 March 2009 on the security of mass-scale events, as amended).

[27] Unfortunately, data on mass-scale concerts is not systemically collected in a comprehensive manner. "Report on the organisation of mass-scale events" [form K-09] only provides information on concert location (outdoors / indoors), while the number of participants is recorded for all mass-scale arts and entertainment events organised by the given institution throughout the previous year. Without doubt, including more information in the form would help create a more detailed description of mass-scale concerts in Poland.

Figure 52. Mass-scale concerts in Poland in 2016-18

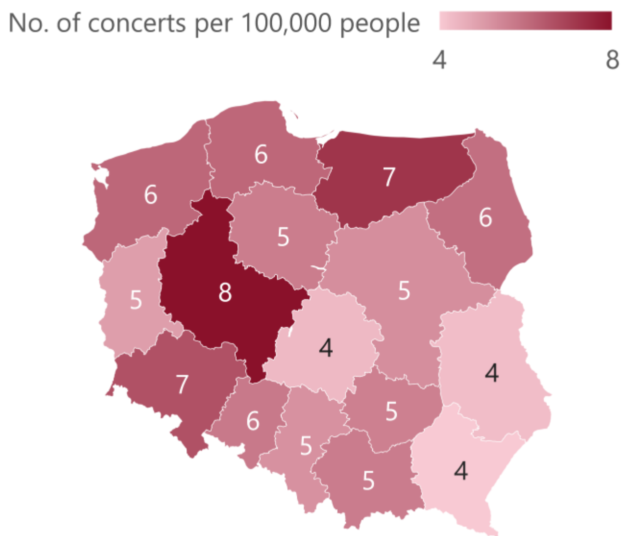


Source: own work based on GUS, BDL data

The spatial distribution of mass-scale concerts is diversified in terms of both time and space. The number of mass-scale concerts per individual voivodeship varies from 55 in Opolskie Voivodeship to 289 in Wielkopolskie Voivodeship. The greatest mass-scale concert to voivodeship population ratio was recorded in Wielkopolskie, Warmińsko-Mazurskie and Dolnośląskie Voivodeships.

Changes between 2018 and 2016 were most noticeable in Mazowieckie and Wielkopolskie Voivodeships, which organised 93 and 81 mass-scale concerts more, respectively.

Figure 53. Mass-scale concerts in 2018 per 100,000 people in 2018

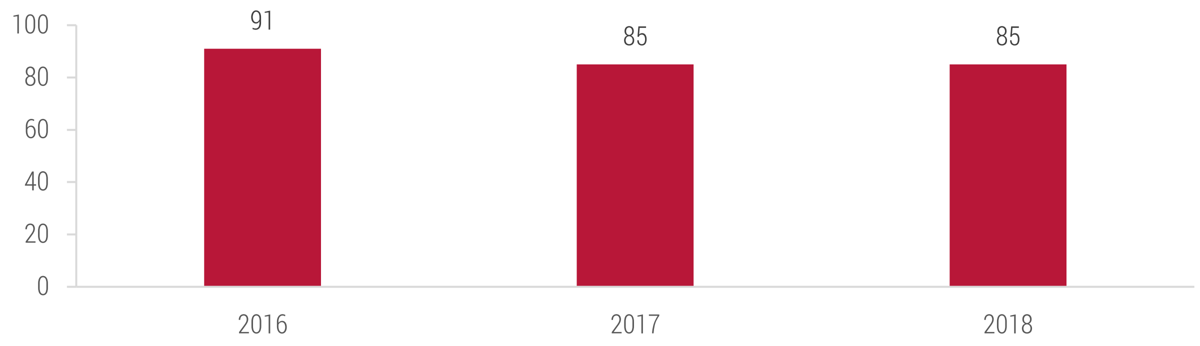


Source: own work based on GUS, BDL data

Music festivals

Festivals are possibly the most recognizable music events. Despite considerable media interest they enjoy and the existence of specialist websites and studies containing information on music festivals, it proved difficult to obtain full and complete data on this segment of the music market, and there is no single entity that would comprehensively aggregate and publish the relevant data. The authors have created a list of 95 unique music festivals taking place in Poland between 2016 and 2018.[28]

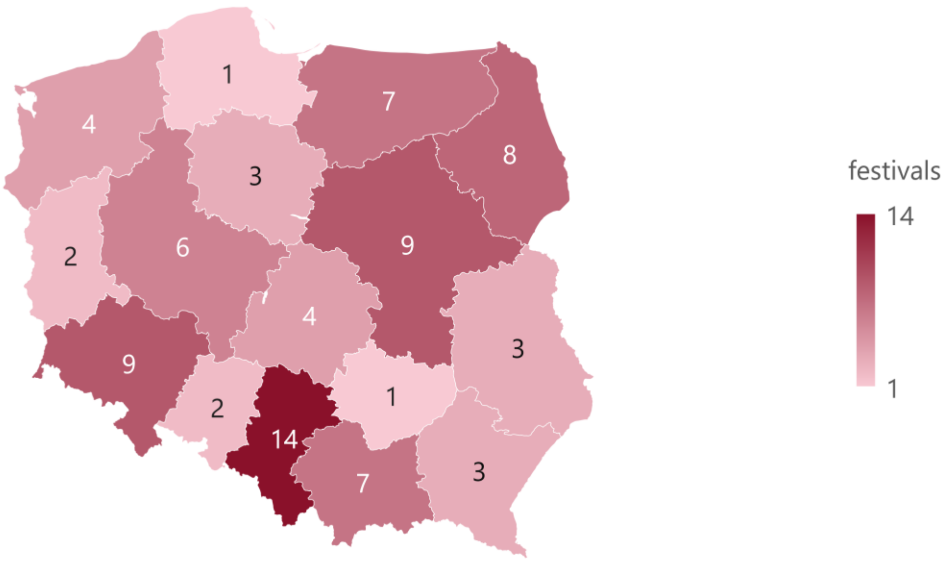
Figure 54. Number of music festivals in Poland in 2016-18



Source: own work

Around a half of all identified music festivals were organised in four voivodeships: Śląskie, Dolnośląskie, Mazowieckie and Podlaskie.

Figure 55. Number of music festivals – spatial distribution in 2018



Source: own work

Almost all identified music festivals took place outdoors (80%), with only 8.5% held in closed facilities, 4% in both types of locations, while for the remaining 8.5% it was not possible to provide an unambiguous answer.

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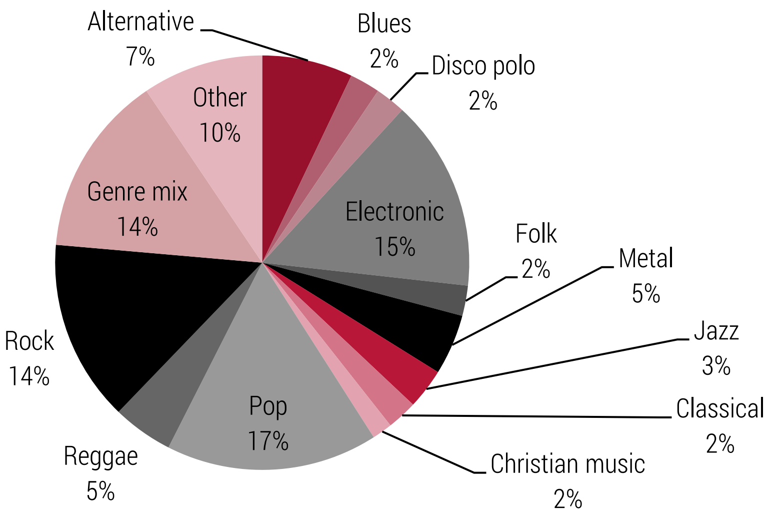
[28] The list of music festivals includes events that are very diverse in terms of their duration, nature and size (measured both by the number of participants and available budget). Desk research analysis and attempts to establish contact with organisers of individual events for the purpose of collecting data on music festivals have not yielded the required data to divide this market segment into subcategories. Individual events were included in the analysis on the basis of being labelled a "music festival" in the media.

These events were of a clearly seasonal nature, with July, August and June being the most "festival-friendly" months.

Festival stages were dominated by pop, rock and electronic music. For one third of the discussed music events, it was possible to indicate more than one dominant genre, whereas for 14% (genre mix), it proved difficult to provide an exhaustive list of music genres presented.

Figure 56. Music genres at festivals in 2016-2018

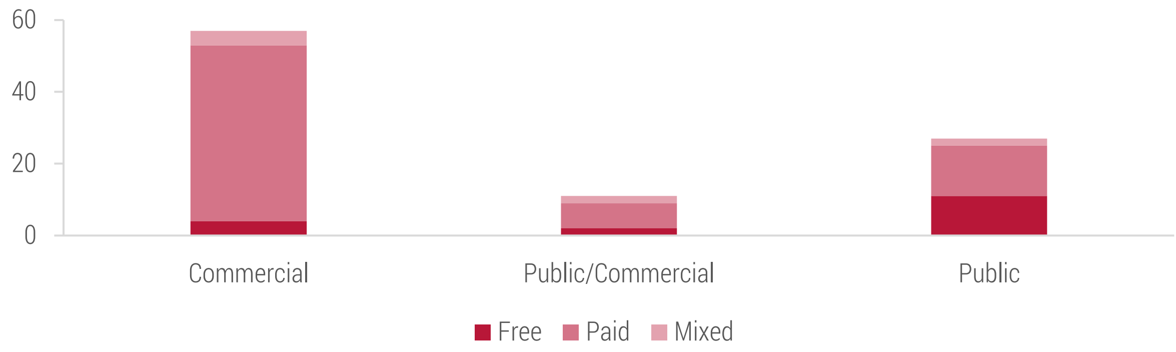


Note: The "Other" category features the following genres (each occurring once): Ambient, Country, Percussion music festival, Hard Rock, Folk, Club music, Wedding music, Sung poetry, Polish song, Punk, Rap, Oldies.

Source: own work

Commercial festivals with paid admission were clearly prevalent in the analysed period. Ticketed festivals (51%) are even dominant among music festivals organised by public entities.

Figure 57. Organisers[29] and ticketing of music festivals in Poland



Source: own work

[29] The category of "public organiser" encompasses all public institutions, such as local government units, municipal offices, public libraries, community centres and cultural centres. "Commercial organisers" include foundations, associations, non-governmental organisations, private entities, companies, arts agencies, PR agencies, clubs, etc.

Case Study 3. The largest Polish music festivals

The biggest music festival in the country is **Open'er**. According to information published on the festival's website, the 2018 edition saw a total of ca. 140,000 participants across four days (in 2017, this figure was 120,000). The Gdynia-based festival features both Polish artists and global stars (2018 headliners included Arctic Monkeys, Depeche Mode, Gorillaz and Bruno Mars).

According to press information, **Orange Warsaw Festival** 2018 attracted an audience of 60,000 over two days. The biggest stars of the 2018 edition included Florence & The Machine, Sam Smith and Dua Lipa.

If we believe estimates provided by the organisers, **Pol'and'Rock Festival** (previously Przystanek Woodstock) – an event with free admission – saw between 500,000 and 700,000 people in 2018. Although these figures are halved in police estimates, this is still the largest event of this type in Poland.

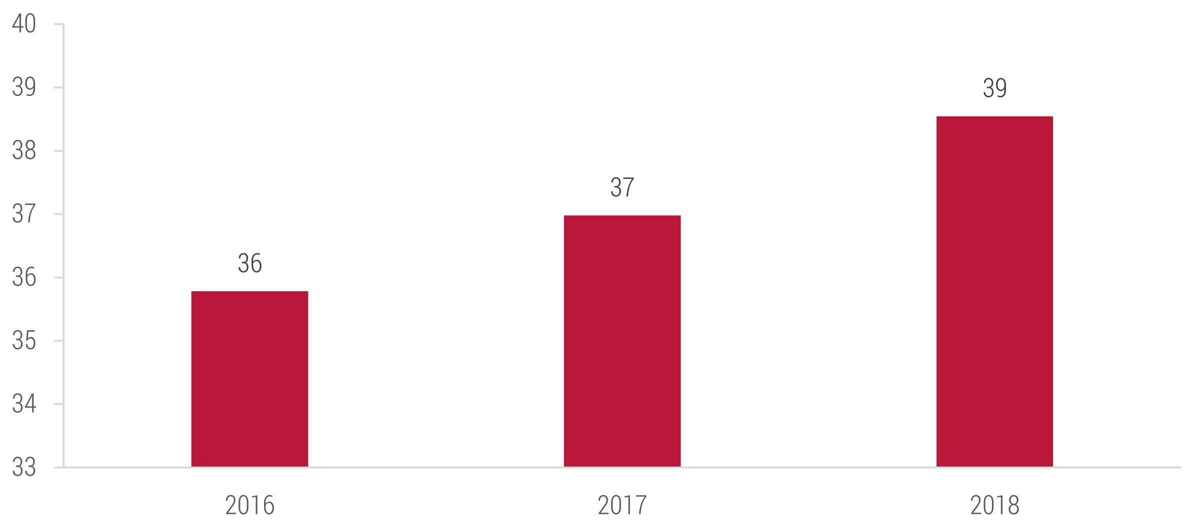
Other notable music festivals in Poland include OFF Festival in Katowice and Impact Festival in Kraków, among others.

3.6. Cultural centres and classical music concerts

Cultural centres

A substantial number of small-scale, dispersed concerts is organised by various community centres, cultural centres, clubs, youth clubs and similar establishments. Between 2016 and 2018, these entities organised more than 111,000 concerts in total.

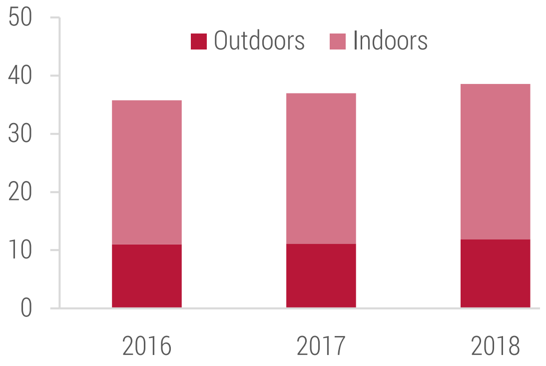
Figure 58. Cultural centres, community centres, clubs, youth clubs and varia – no. of concerts (in thousands) in 2016-18

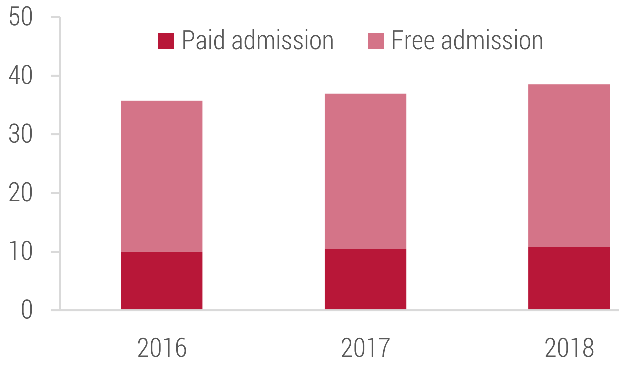


Source: own work based on GUS, BDL data

The number of concerts organised by cultural institutions seems to confirm the separate nature of available datasets, suggesting that some of these events were not reflected in other data sources employed in the present study. The structure of concerts has not changed over the years. The prevalent types are events taking place indoors, events organised independently by the given entity and events with free admission.

Figure 59. Cultural centres, community centres, clubs, youth clubs and varia – types of concerts (in thousands) in 2016-18



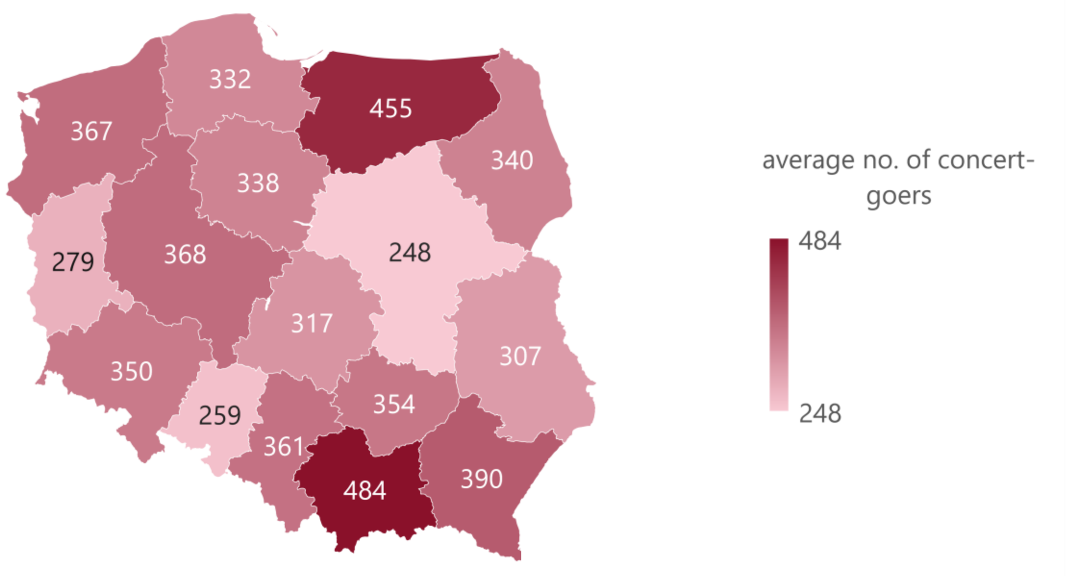


Source: own work based on GUS, BDL data

The concert/audience ratio in individual voivodeships demonstrates a similarly fixed nature, and has remained virtually unchanged over the years. Unlike similar data concerning classical music (presented further on in the study), the ratio of the number of concerts organised by cultural institutions to the number of concert-goers remains relatively proportionate across Poland, i.e. the number of concerts organised within individual voivodeships and their attendance is comparable to the total number of concerts and their participants in the whole of Poland. The only exceptions are Mazowieckie Voivodeship, where a greater number of concerts attracts proportionately lower audience numbers, and Małopolskie Voivodeship, where the opposite was true in 2018.

The nationwide average are 350 participants per event. Two voivodeships ranked well above this figure: Małopolskie, with the highest average number of concert-goers, and Warmińsko-Mazurskie.

Figure 60. Cultural centres, community centres, clubs, youth clubs and varia – average no. of concert-goers (in thousands)



Source: own work based on GUS, BDL data

Classical music

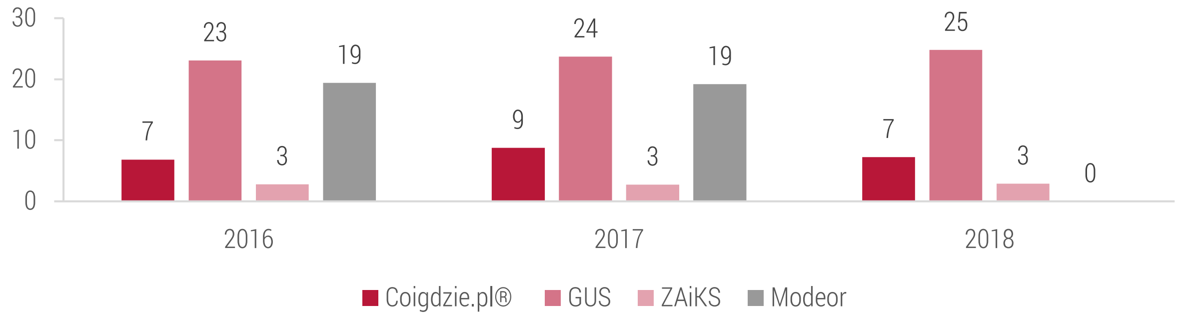
Owing to numerous deficiencies of existing data concerning the concert market, it seems valid to analyse more closely the one segment that clearly stands out in terms of current reporting standards. Classical music concerts undergo comprehensive reporting, and philharmonics, orchestras and choirs – institutions co-financed from public funds – have to account for their expenses in a detailed manner.

Apart from general data, the Polish Orchestra Models project (Polish: *Modele Orkiestr Polskich*, further: Modeor) also deserves a mention here. Modeor was launched to collect and analyse data on various aspects of the statutory activity and financing of Polish orchestras. The study encompasses philharmonic orchestras, institutional Polish orchestras and vocal-instrumental ensembles (except for operatic orchestras) which pursue ongoing concert activity. This is the only analytical and reporting initiative on the concert market. The analysis covers the 2011–17 period.

Nevertheless, detailed reporting available with respect to the classical concert market indicates further problems in creating its accurate description based on existing data. In analytical terms, this is a difficult situation, where data scopes are not overlapping, and once all relevant data for 2016-18 was collected and analysed, the emerging picture was that of a concert market where, at the same time:

- according to Statistics Poland (GUS), there were more than 23,000 classical music concerts in 2016-17, and 24,000 in 2018;
- fewer than 3,000 concerts were reported to ZAiKS each year;
- close to 7,000 classical music concerts were recorded on the Coigdzie.pl® website in 2016, with 9,000 recorded in 2017 and 7,000 in 2018;
- according to a report published by Modeor Foundation, in 2016–17, philharmonics organised around 3,000 concerts of their own ensembles and 16,000 other concerts (e.g. ones aimed at developing classical music listenership) on an annual basis.

Figure 61. Number of classical music concerts recorded in various sources (in thousands)[30]



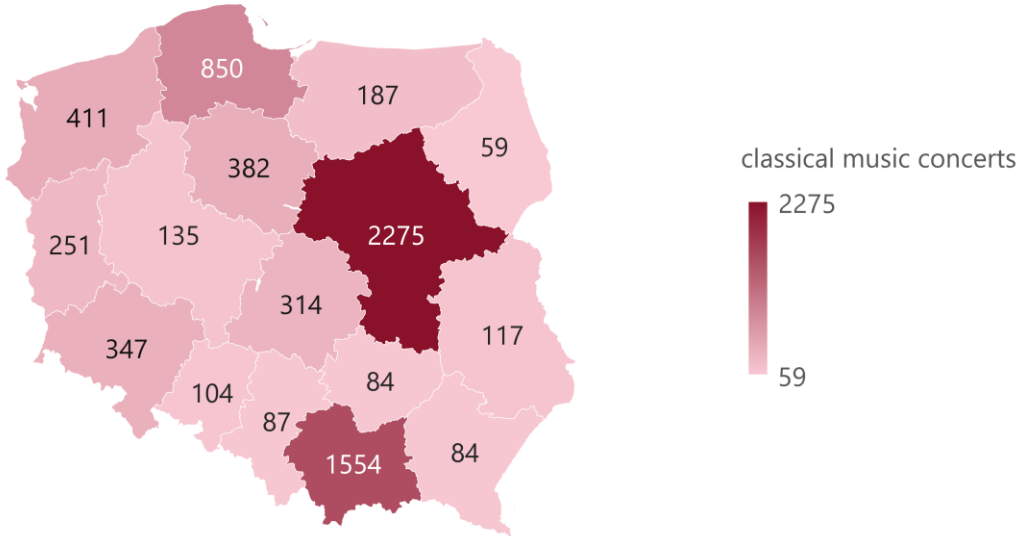
Note: in the case of Modeor Foundation's report, 0 means no available data for the year in question.
The provided values do not add up, and the existing discrepancies result from different methods used to collect and report data.

Source: own work

[30] The data shown is not comparable – it is presented together to better reflect the difficulties faced by researchers of the classical music concert market in Poland.

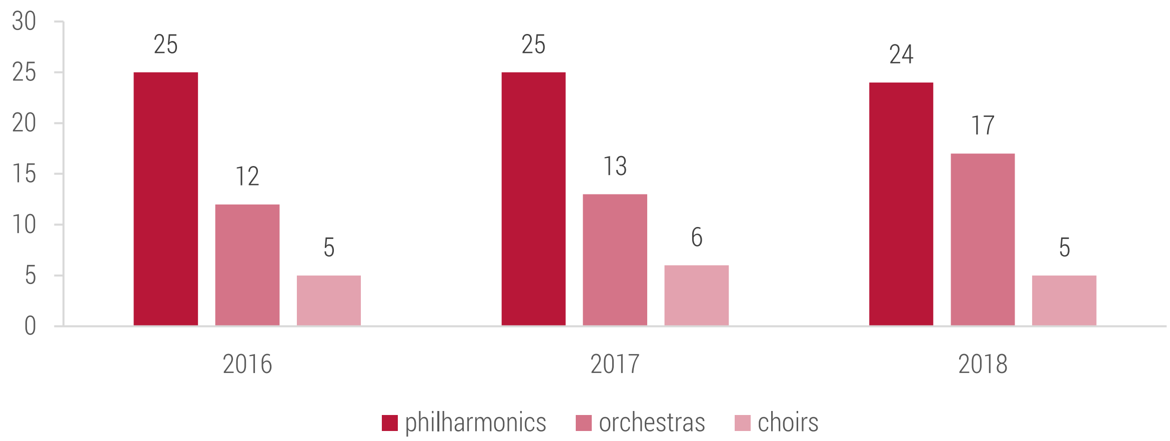
Only the Coigdzie.pl® database allows for an effective description of the spatial distribution of classical music concerts organised in Poland. Three voivodeships recorded a clearly better-than-average score in that respect: 65% of concerts was organised in Mazowieckie, Małopolskie and Pomorskie Voivodeships.

Figure 62. Spatial distribution of classical music concerts recorded on Coigdzie.pl® (2018)



According to Statistics Poland (GUS), between 42 and 46 entities offering classical music concerts operated in Poland between 2016 and 2018. Across that period, the number of orchestras increased and the number of philharmonics slightly dropped (the number of choirs remained unchanged).

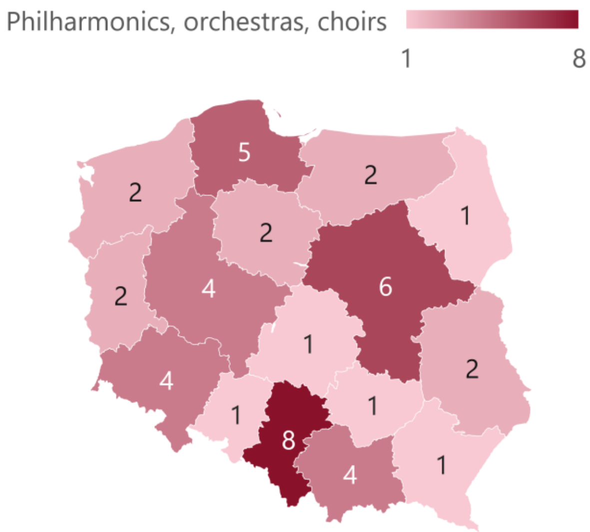
Figure 63. The number of philharmonics, orchestras and choirs in 2016-18



Source: own work based on GUS, BDL data

In the analysed period, the number of philharmonics, orchestras and choirs within a single voivodeship ranged between one and eight. In most voivodeships, these figures remained unchanged. The only exception was Śląskie Voivodeship (increase by three in 2018) and Wielkopolskie Voivodeship (increase by two in 2017 and then drop by one in 2018).

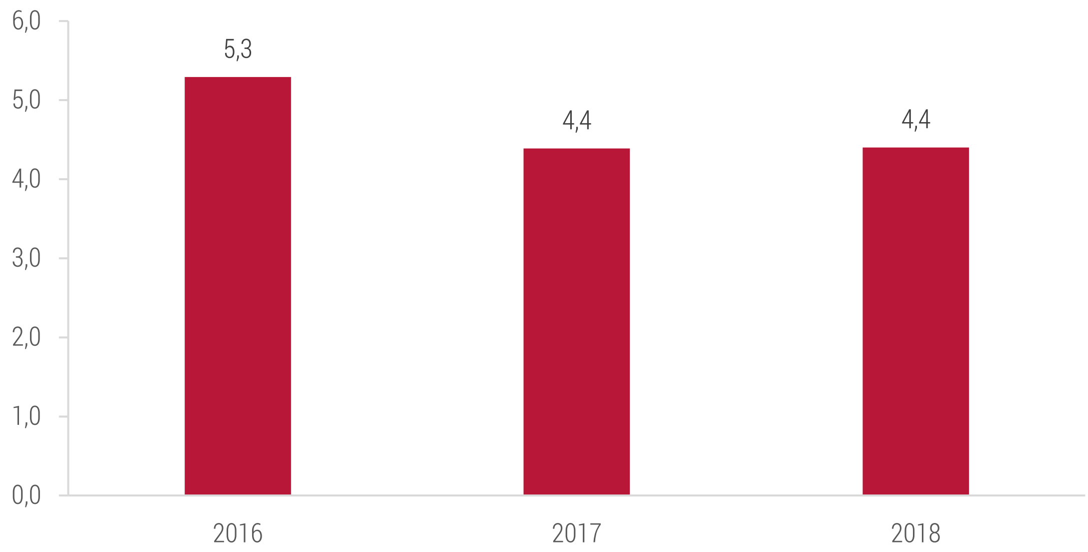
Figure 64. Philharmonics, orchestras, choirs – numbers per voivodeship in 2018



Source: own work based on GUS, BDL data

Between 2016 and 2018, the number of concerts organised by philharmonics, orchestras and choirs increased each year (from 23,000 in 2016 to almost 25,000 in 2018). A simultaneous drop in audience numbers was recorded across the same period: from more than 5 million to over 4 million participants. At the same time, fewer than 3,000 concerts a year were reported to ZAiKS.

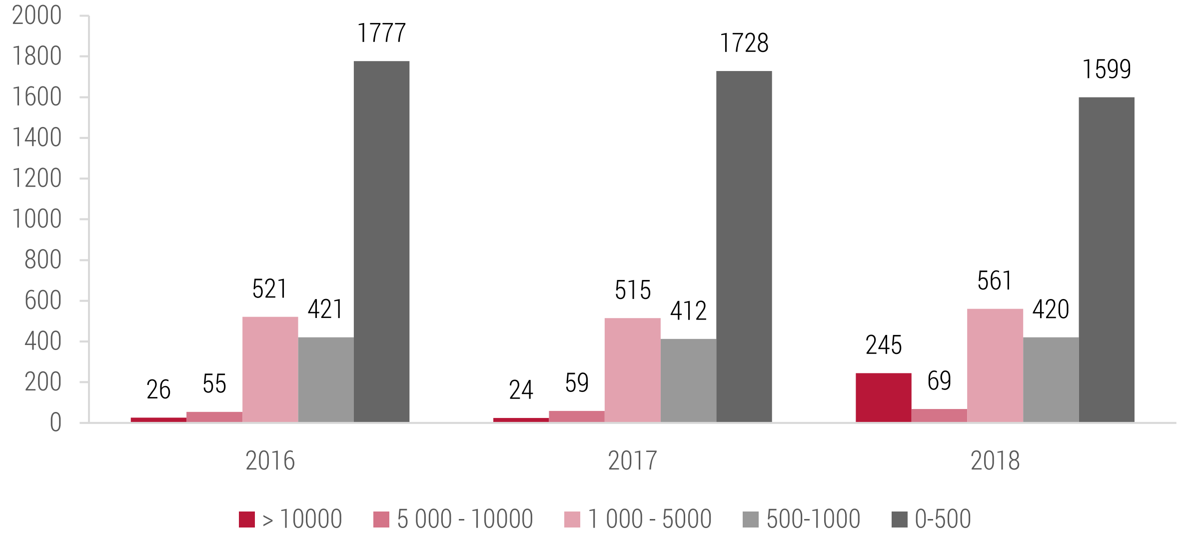
Figure 65. Attendance at classical music concerts (in million) in 2016-18



Source: own work based on GUS, BDL data

Falling attendance rates are coupled with a more than tenfold increase in the number of classical music concerts in the highest rights' revenues bracket (up to 245 concerts in 2018). According to information obtained from ZAiKS, the increase recorded between 2017 and 2018 results first and foremost from concerts organised to commemorate the centenary of Poland's regained independence.

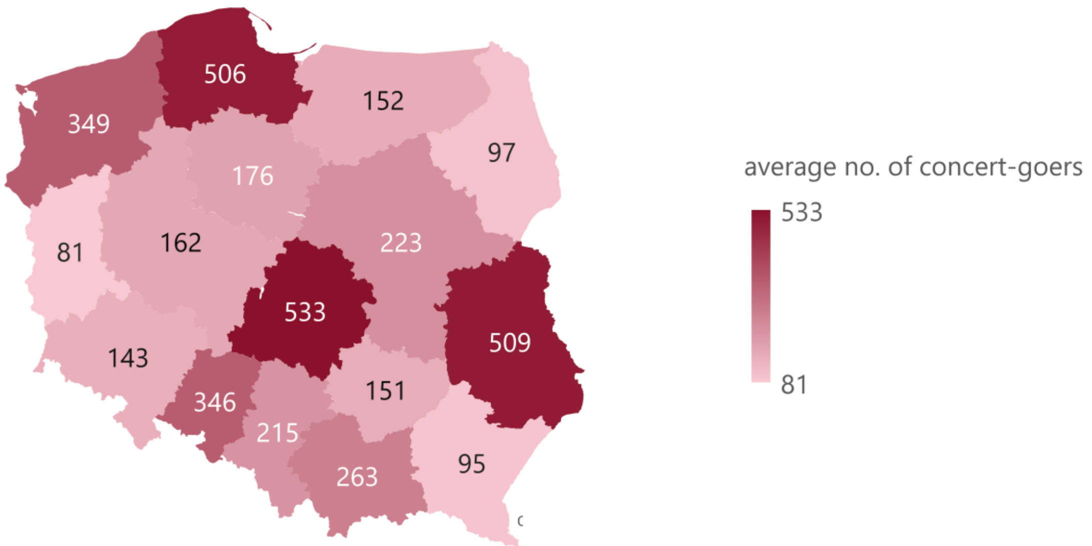
Figure 66. Remuneration structure for classical music concerts reported to ZAiKS



Source: own work based on ZAiKS data.

The structure of concerts and concert-goers has not undergone any significant changes in the analysed period. Only in Małopolskie Voivodeship did philharmonics, orchestras and choirs attract far larger audiences in 2016 than in other years, despite a permanent number of organised music events. Some voivodeships attract more concert-goers in spite of the proportionately lower number of concerts (e.g. Małopolskie), others record greater fragmentation of the concert scene (e.g. Lubuskie). On the other hand, in terms of the average attendance of classical music concerts, Łódzkie, Pomorskie and Lubelskie Voivodeships clearly stand out.

Figure 67. Average audience size per voivodeship in 2018

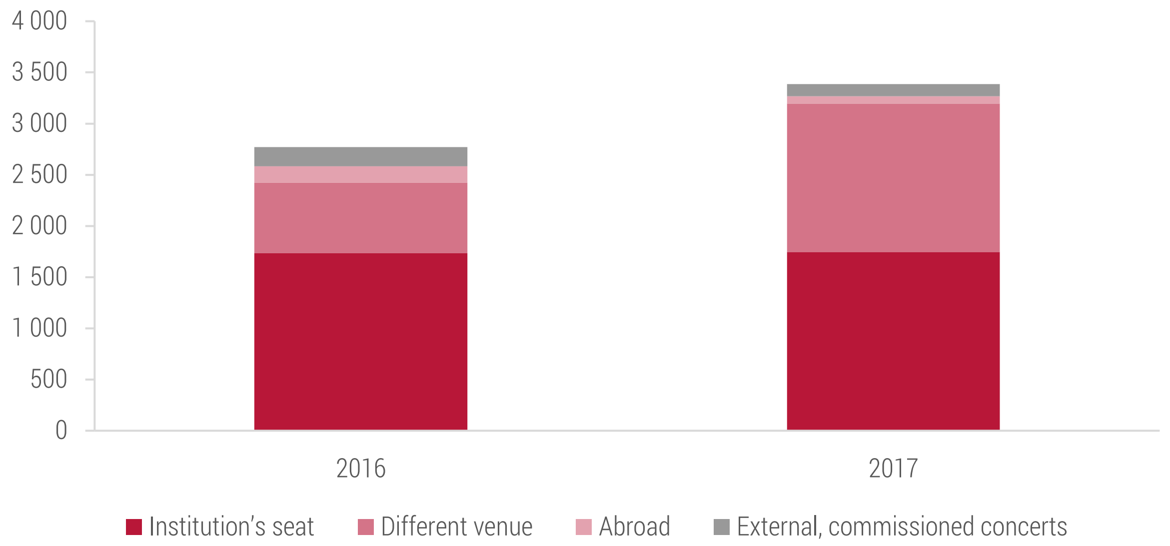


Note: Data was aggregated in voivodeships as per the concert location.

Source: own work based on GUS, BDL data

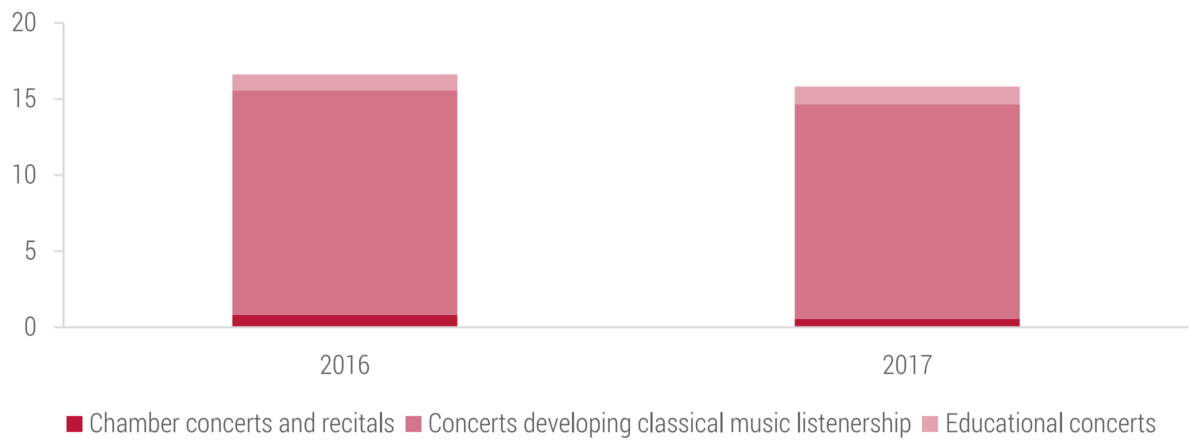
In addition, the main activity of philharmonics may be divided into their own concerts, either taking place in Poland (at the institution's seat or in a different venue) and abroad, as well as external concerts, organised on commission. Furthermore, all institutions analysed by Modeor Foundation also organise additional concerts (educational ones or ones aimed at developing listenership). Detailed figures concerning individual concerts are presented below.

Figure 68. Structure of concerts organised by philharmonics in 2016-17



Source: own work based on data made available by Modeor Foundation ((http://www.modeor.pl, retrieved: 16-27 Sept 2019)

Figure 69. Other concerts (in thousands)



Source: own work based on data made available by Modeor Foundation ((http://www.modeor.pl, retrieved: 16-27 Sept 2019)

The authors have been unable to find coherent data on the value of the classical concert market. According to Statistics Poland (GUS), ticket sales for concerts organised by philharmonics, orchestras and choirs are growing by the year, reaching almost PLN 50 million in 2018. At the same time, ticket revenues recorded by Modeor Foundation in 2016 and 2017 represented a permanent part of the institution's revenues from ordinary activities, accounting for 52% of the total value in both analysed years. Over the same period, ZAiKS recorded PLN 2.5 million a year in 2016-17 and PLN 2.8 million in 2018 in revenues.

4. Export of Polish music

Gałuszka (2016) recommended analysing Polish music exports on the basis of three aspects:

1. revenues generated by the phonographic industry selling its products outside Poland,
2. revenues received by Polish artists because the works to which they have economic rights were used outside Poland (music publishing revenues or revenues received from foreign CMOs),
3. profits gained by Polish performers and entities representing them for live performances outside the country.

Unfortunately, there is no available data concerning the first and third aspect. Therefore, the estimated value of Polish exports can only be based on figures reported by Polish CMOs. What should be emphasised here is that they do not represent the total value of all Polish music exports.

The vast majority of funds received by Polish CMOs, 95%, is transferred to ZAiKS. In 2018, the total funds received amounted to ca. PLN 6 million. Nordic countries are commonly regarded as European leaders in the export of music – suffice it to say that in 2018 Swedish CMOs received almost PLN 120 million in revenues. The above-mentioned examples – Finland (described in Case Study 4) and Sweden – may be regarded as both the path to follow and the goal to pursue by Polish music exports. Not only institutional support (of the Ministry of Culture and National Heritage or the Music Export Poland foundation), but also the help of artists who already enjoy international success (Behemoth in the USA, Margaret in Scandinavia, etc.) are recommended as options to consider.

Case Study 4. The success of Nordic music exports

Finnish music has been gaining popularity on international markets since 2000. The total market value of the country's music exports increased from EUR 28.9 million in 2005 to EUR 58.9 million in 2017. However, the above values represent the industry's own estimates. Amounts received by Finnish CMOs from their foreign counterparts allow for a better comparison – in 2018, this revenue amounted to EUR 5.7 million, while in 2005, the corresponding amount was EUR 2.7 million.

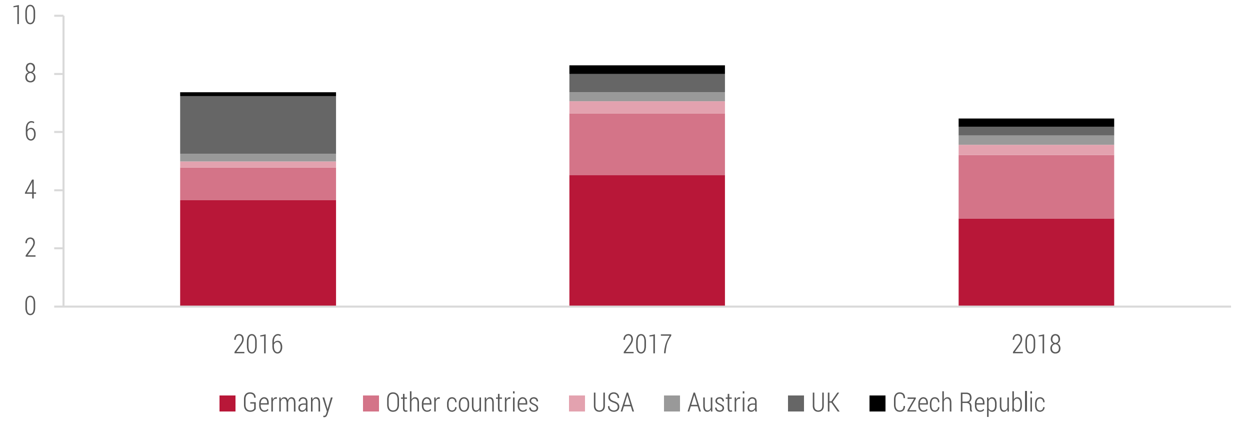
In 2000, Bomfunk MC, Darude and HIM simultaneously conquered the charts around the world. In a sense, that was the moment when the export of Finnish music began for real. Following that breakthrough year, the promotion of Finnish music now rests on two pillars. On the one hand, popular stars are supported by their record companies and do not need help from state institutions. On the other hand, lesser known and emerging artists receive the patronage of state administration, which often involves cooperation between state institutions and Finnish record companies. Researchers analysing the success of Finnish music exports also point to the important role of Finnish stars, who promote lesser known fellow artists internationally.

Source: https://musicfinland.com/en/news/finnish-music-sector-and-export-continue-to-grow-steadily

Mäkelä, J. (2008). The state of rock: a history of Finland's cultural policy and music export. Popular Music, 27(02). doi:10.1017/s0261143008004054

Broken down by country, the highest revenues received by Polish CMOs come from Germany (PLN 3 million in 2018).[31] In recent years, they constituted half (and in 2017 even 55%) of all the revenues received by organisations representing Polish artists.

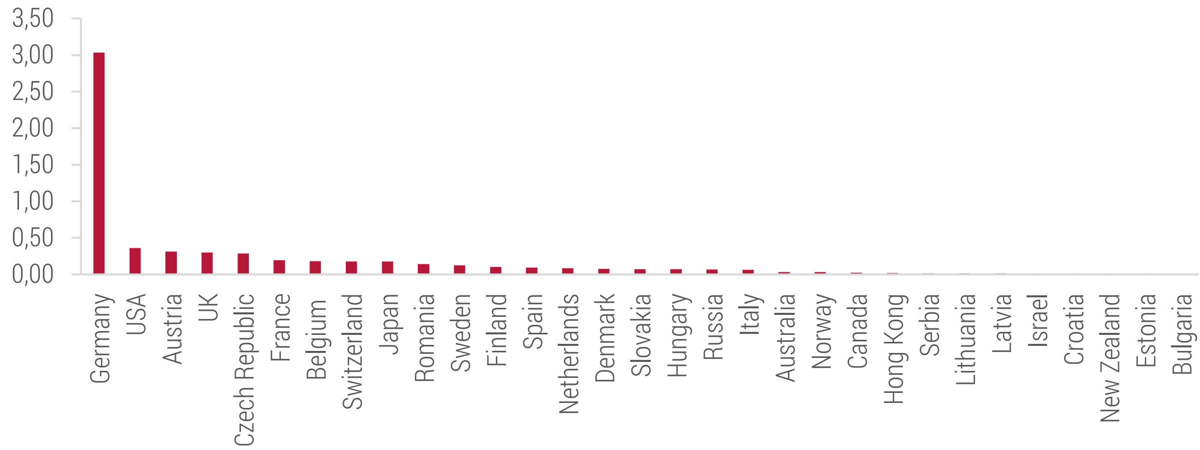
Figure 70. Revenues received by Polish CMOs from their foreign counterparts in 2015–18 (in PLN million)[32]



Source: own work based on ZPAV data (2018)

Based on information on revenues received from foreign CMOs, it can be inferred that Polish music is mostly popular in Europe. Revenues from North America and Asia constitute but a small percentage of the total sum. When it comes to non-European countries, Polish CMOs receive the highest amounts from the USA and Japan (6% and 3% of the total amount recorded in 2018, respectively). Other Asian, South American and African countries as well as Australia are of marginal importance for Polish music exports.

Figure 71. Revenues received by Polish CMOs from their foreign counterparts in 2018 (in PLN million)



Source: own work based on ZPAV data (2018)

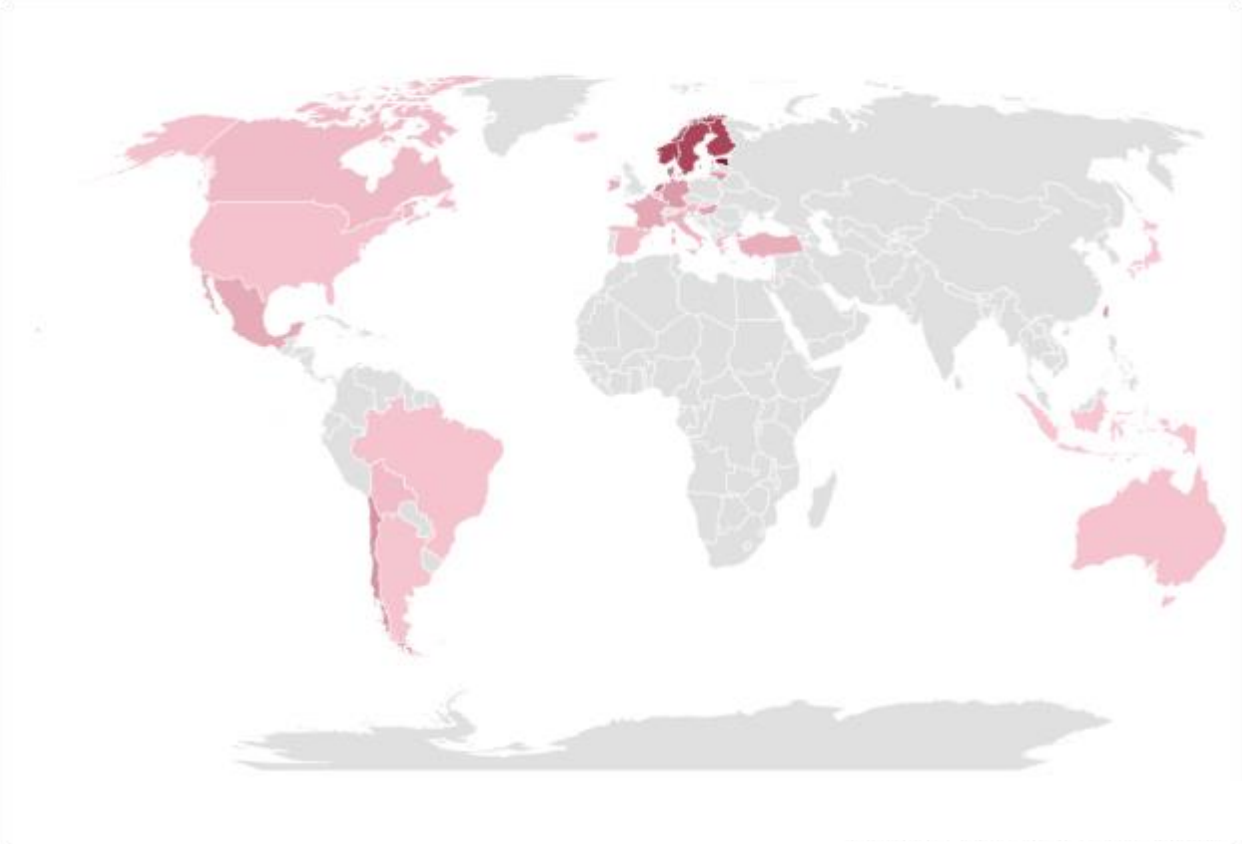
[31] The figures received from ZAiKS differ from the ones reported in the organisation's financial statements, which may result from reporting errors. Nevertheless, better quality data was not available.

[32] It is not possible to allocate specific amounts to individual artists on the basis of obtained data, which is why it cannot be said for certain which artists bring the highest amount of revenues from each country.

Polish artists in foreign Spotify rankings

Apart from examining the financial statements of Polish CMOs, the authors have also analysed Spotify data, which indirectly indicates which Polish artists are popular in which country (Figure 43). Foreign listeners who enjoy Polish music can be found primarily in other European countries (Estonia, the Netherlands and Nordic countries).

Figure 72. The popularity of Polish artists in other countries according to Spotify (2018)



Note: Lighter colours indicate smaller popularity and darker colours indicate greater popularity. Countries with no information on listeners of Polish artists are depicted in grey. The popularity of Polish artists is depicted on the basis of five cities in which given artists are popular according to Spotify. The values are adjusted to reflect the population of individual countries (the popularity of Polish artists on Spotify per million inhabitants of a given country).[33]

Source: own work based on Spotify data.

[33] Two countries with small populations, but relatively high streaming numbers for Polish artists are not included on the map: Iceland and Malta. Interestingly, Polish artists appear relatively often on their local charts (e.g., in 2018, Polish artists appeared 139 times on the weekly charts of the top 200 artists in Malta). Still, the popularity of Polish artists among Spotify users in these countries may be misleading. In the case of Iceland, it may be associated with a high percentage of Poles living there (according to official Statice.ie data for 2017, Poles represented 4% of Iceland's population; unofficial data suggests a share as high as 11%). The popularity of Polish artists in Malta (Taco Hemingway and Bedoes are among the most popular musicians in the country according to Spotify) may result from the fact a Polish auction site sells access to premium Spotify accounts registered outside Poland. Such accounts are often registered in Malta, which – given the country's relatively small population – may be enough to affect the domestic charts.

Information obtained from Spotify made it possible to identify three Polish artists who are most popular abroad. These are Margaret (popular primarily in Sweden, but also in other Nordic countries), Ewa Farna (Czech Republic and Slovakia) and Gromee[34] (Estonia and Nordic countries). Margaret and Gromee are popular both in Poland and abroad. Margaret is relatively popular in all music distribution channels in Poland, while Gromee's tracks are some of the most frequently broadcast on radio and TV.

Table 24. Spotify's most popular Polish artists abroad by music distribution channel in Poland (2018)

#TOP	Name	OLiS album charts	Vinyl	Radio	TV	Spotify	iTunes	Tidal	Plus Music	Night clubs
1	Margaret	192	>160	4	28	98	31	10	6	>300
2	Ewa Farna	>335	>160	140	>70	>410	739	>66	124	>300

Source: own work based on collected data

Table 25. Spotify's most popular Polish artists abroad on YouTube (2018)

#TOP	Name	YouTube (Artists)	YouTube (Songs)	YouTube (Videos)
1	Margaret	40	12	>340
2	Ewa Farna	>264	>331	>340

Source: own work based on YouTube data

Polish artists in the Eurovision

The authors have assumed that representing Poland in the Eurovision Song Contest may also affect the popularity of Polish artists abroad. This effect seems to have taken place in the case of Gromee, who has found an audience outside Poland. However, similar levels of popularity abroad have not been observed for artists representing Poland in 2016 and 2017. The authors have also verified whether the Polish Eurovision contestants were able to maintain their domestic popularity for a longer period of time, with positive results recorded for Gromee and Michał Szpak (who appears on the OLiS Official Retail Sales Chart for both CDs and vinyl).

Table 26. The popularity of Polish 2016–18 Eurovision contestants by music distribution channel in 2018

Year	Name	OLiS album charts	Vinyl	Radio	TV	Spotify	iTunes	Tidal	Plus Music	Night clubs
2016	Michał Szpak	29	78	234	>69	>410	>882	>66	>153	>300
2017	Kasia Moś	>335	>160	>433	>69	>410	>882	>66	>153	>300
2018	Gromee	134	>160	2	1	52	114	57	1	4

Source: own work based on collected data

[34] Gromee, who represented Poland at the 2018 Eurovision Song Contest, is described in detail in Tables 27 and 28.

Table 27. The popularity of Polish 2016–18 Eurovision contestants on YouTube in 2018

Year	Name	YouTube (Artists)	YouTube (Songs)	YouTube (Videos)
2016	Michał Szpak	>264	>331	>340
2017	Kasia Moś	>264	>331	>340
2018	Gromee	81	31	>340

Source: own work based on YouTube data

Polish artists mostly popular abroad

There are some Polish artists who have achieved international success, but remain considerably less popular in Poland. For this reason, they were not included in the previous chapters, which presented data concerning music that dominates the domestic charts. Many such acts are alternative rock and metal bands. The nature of their music and social media activity suggests that Polish listeners are not their intended target audience. Another such example are composers, whose work (including film scores) often finds listeners all over the globe, as a result of which the total number of their listeners outside Poland may exceed the size of their Polish audience.

The report uses data obtained from Last.fm to describe such Polish artists in more detail. The Last.fm figures are not representative of any music distribution channel, but they make it possible to indicate the relative level of popularity of musicians tagged as Polish artists. Significantly, Last.fm data allows to identify artists with relatively large audiences across the world, regardless of how individual listeners play their music. Table 29 presents Last.fm's list of the most popular Polish artists who owe their popularity to foreign listeners.[35]

Table 28. Polish artists with a large following outside Poland, according to the ranking of Polish artists on Last.fm

#TOP	#TOP among Polish artists	Artist	Listeners on Last.fm[36]	Twitter	Facebook	Genre
1	1	Frédéric Chopin	1,267,081	-	-	Classical
2	2	Behemoth	410,486	357,200	1,408,777	Metal
3	3	Riverside	359,557	8,465	139,182	Metal
4	5	Skalpel	331,694	501	29,416	Jazz / hip hop
5	8	Zbigniew Preisner	279,403	-	27,905	Classical
6	9	Vader	275,358	27,400	445,195	Metal
7	13	Pati Yang	241,666	-	-	Electronic

[35] The contribution of foreign listeners is estimated on the basis of the language of song lyrics (or lack thereof in the case of classical music), comments left on the artists' profiles (whether they are in English or not), and the language used on the artists' social media.

[36] The number of listeners on Last.fm indicates all listeners, both Polish and foreign.

Table 28. Polish artists with a large following outside Poland, according to the ranking of Polish artists on Last.fm (continued)

#TOP	#TOP among Polish artists	Artist	Listeners on Last.fm[37]	Twitter	Facebook	Genre
8	26	Decapitated	184,139	94,900	649,959	Metal
9	30	She	169,640	10,500	38,510	Electronic
10	31	Arthur Rubinstein	163,141	-	-	Classical
11	33	Henryk Górecki	156,153	-	-	Classical
12	40	East Clubbers	141,365	226	27,843	Electronic
13	44	Jan A.P. Kaczmarek	133,264	-	25,963	Classical
14	45	Wojciech Kilar	133,171	-	-	Classical
15	47	Novika	132,771	624	34,676	Electronic
16	49	Flykkiller*	131,231	-	-	Electronic
17	57	Lunatic Soul*	121,270	3,255	27,161	Other
18	58	Abel Korzeniowski	116,909	3,537	34,744	Classical
19	70	Krzysztof Penderecki	106,408	-	-	Classical
20	84	Tides From Nebula	88,857	1,745	39,891	Other / Metal

*Note: * Flykkiller is a duo co-created by Pati Yang; Lunatic Soul is a solo project of Riverside's singer/bass player. In the latter case, the number of Twitter followers refers to the artist's account (@Marivsz_Riv).*

Artists listed in Table 30 can be easily divided into three groups, which together cover almost all of them. None of the musicians represent the genre colloquially referred to as pop music. Many are composers – from Frédéric Chopin to more contemporary artists, including film music composers. Frédéric Chopin has a significantly higher number of unique listeners on Last.fm than any other Polish artist, which proves the strength of Polish classical and film music on the international market. The second large group consists of metal and progressive rock bands, with acts such as Behemoth, Riverside, Vader and Decapitated at the helm. These bands are also very popular on social media, attracting hundreds of thousands of followers.

The most popular foreign musicians in Polish charts

The authors have analysed the list of top 10 artists from the 2018 IFPI report, and determined their position in the top artist charts in Poland. This may be treated as a reflection of their *imported* popularity. The data presented in Table 33 indicates that Ed Sheeran is the most recognisable artist out of the 10 most popular foreign musicians in Poland, and he places relatively high in all the rankings. Foreign hip hop artists from the top 10 (Drake, Post Malone and Eminem) are much less popular than Polish representatives of the genre.

[37] The number of listeners on Last.fm indicates all listeners, both Polish and foreign.

Table 29. The most popular foreign artists on Polish charts

#TOP	Name	OLiS album charts	Vinyl	Radio	TV	Spotify	iTunes	Tidal	Plus Music	Night clubs
1	Drake	277	>160	>433	>69	21	132	49	>153	>300
2	BTS	224	>160	>433	>69	159	58	>66	>153	>300
3	Ed Sheeran	6	99	9	39	12	1	4	31	8
4	Post Malone	>335	>160	119	>69	8	93	14	>153	>300
5	Eminem	62	>160	120	>69	54	66	>66	132	>300
6	Queen	16	28	188	>69	72	136	>66	>153	>300
7	Imagine Dragons	11	>160	8	18	7	27	5	134	>300
8	Ariana Grande	78	>160	49	48	15	13	25	144	>300
9	Lady Gaga	>335	>160	392	>69	118	86	>66	>153	>300
10	Bruno Mars	>335	>160	250	>69	167	183	>66	>153	138

Source: own work based on collected data

Apart from Bruno Mars, all other most popular foreign artists rank in the top 10 of the YouTube charts (Table 30). Ed Sheeran is the most popular artist on YouTube. While Polish hip hop artists are some of the most popular artists on YouTube, their foreign counterparts do not enjoy the same level of popularity (with the sole exception of Eminem, who is still much less popular than Polish rappers).

Table 30. The most popular foreign artists on Polish YouTube charts

#TOP	Name	YouTube (Artists)	YouTube (Songs)	YouTube (Videos)
1	Drake	208	161	192
2	BTS	130	180	186
3	Ed Sheeran	2	20	21
4	Post Malone	167	230	201
5	Eminem	39	116	112
6	Queen	81	232	248
7	Imagine Dragons	8	74	79

Source: own work based on YouTube data

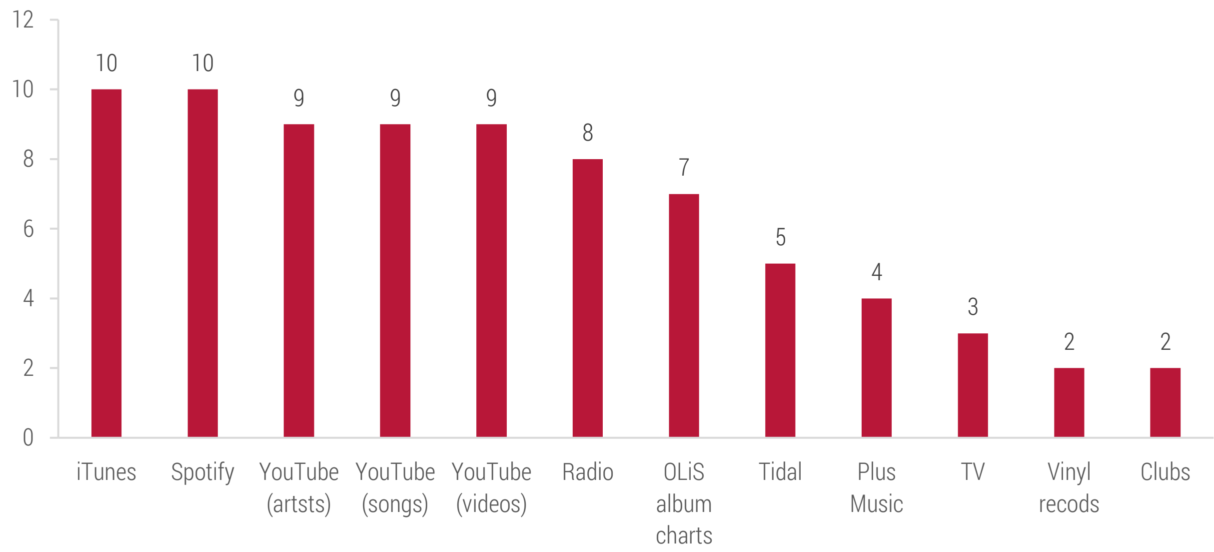
Table 30. The most popular foreign artists on Polish YouTube charts (continued)

#TOP	Name	YouTube (Artists)	YouTube (Songs)	YouTube (Videos)
8	Ariana Grande	9	18	23
9	Lady Gaga	84	77	71
10	Bruno Mars	>264	>331	>340

Source: own work based on YouTube data

The highest convergence was observed between the top artist charts of the main digital distribution channels. The artists featured in the top 10 global artist chart also appeared in the Polish iTunes and Spotify rankings. Nine of them were also ranked on the YouTube top artist chart, eight of them were among the artists most often played on Polish radio stations, and seven were among the artists with the largest physical sales. No more than five appeared only on Tidal or Plus Music charts, as well as on the charts concerning TV, vinyl and night clubs.

Figure 73. Convergence between top artist charts



Source: own work based on collected data

5. Musical preferences of Poles

This chapter aims to characterise the musical preferences of Poles and trace their social and cultural contexts. Such research has been performed in Poland since the 1960s (Socha, 2011, p. 12). Its intensity increased in the 1970s and 1980s, due to growing interest in youth culture and a desire to learn and understand how young Poles participated in cultural life. After 1989, a decreased interest in music research can be observed (Wyrzykowska, 2017, pp. 14-15).

For Poles, music is an important element of everyday life. CBOS research shows that 65% of adult Poles listen to it every day. Listening to music from the radio (68%) is by far the most popular, with music from television (39%) and free online sources (30%) being less prevalent. Moreover, a correlation can be observed between the increasing age of respondents and the decreasing percentage declaring they listen to music every day (77% in the 18-24 age group, 70% in the 35-44 age group and 50% in the 65 and older group) (CBOS, 2018a, pp. 1-2).

This chapter consists of 6 parts:

1. a definition of musical preferences and discussion of their relationship with music taste and primary social correlates;
2. a description of the studies we used to analyse the musical preferences of Poles;
3. an outline of Poles' musical preferences;
4. a list of Poles' favourite artists;
5. an analysis of the social diversification of Poles' musical preferences;
6. the musical preferences of young people.

The analyses presented below show that Poles regard listening to music as an important part of everyday life. Spending time with music is particularly important for young Poles. As many as 99% of teenagers (12-17 years old) say they listen to it.

Poles mostly enjoy pop (29%), disco polo (20%) and rock (17%). Classical music (12%), electronic music (7%), oldies (6%), jazz (5%) and rap/hip hop (5%) are less popular (CBOS, 2018a, pp. 8-9).

Pop music is more often listened to by women, people aged 25-34, those with higher education, and residents of medium-sized and large cities. We observe a positive correlation between an increased preference for pop and rock music. In addition, respondents who declare that they like pop, indicate they like disco polo slightly more often than others.

Appreciation shown for disco polo by the media, including public media, has to an extent led to the belief that disco polo is very popular at the moment. However, an analysis of CBOS research from 1996 and 2018 shows that the preference for this genre is currently at a similar level as it was in the 1990s. Men and women like disco polo to a comparable degree. The strongest preference for this genre is among people aged 45-54, residents of rural areas and those with vocational education. As the positive attitude towards disco polo grows, preference for classical music and rock falls. A weak positive correlation between preference for disco polo and pop is also visible.

Men like rock more often than women. This music genre is most popular among people aged 18-44, residents of large cities and those with higher education. Analyses have shown that the more one likes rock, the more they like classical music. Meanwhile, the level of preference for rock does not significantly influence interest in pop music.

There is a stronger correlation between liking rock and one's opinion on disco polo – an increased preference for rock means a decrease in sympathy for disco polo.

Classical music is more often indicated as the favourite music genre by women, people aged 65 and older, residents of large cities and those with higher education. It is noticeable that preference for classical music is mostly positively correlated with positive feelings towards rock, very weakly correlated with liking pop music and negatively correlated with liking disco polo.

5.1. Musical preferences and their social context

The term "musical preferences" is sometimes used (especially in media discourse) interchangeably with the term "music taste", but these are not synonymous. Musical preferences simply mean "liking music" – specific artists or music genres (Lamont, Greasley, 2009, 160). Music taste is a more complex term. The French sociologist Pierre Bourdieu defined it as "displaying preference". In his approach, music taste not only allows the preferences of a particular person to be defined, but also makes it possible to assess the preferences of other people or groups (Bourdieu, 2005, p. 220). Another French researcher, Antoine Hennion, considers taste to be a form of human action: "(...) it is neither an attribute nor a property (of a person or thing), but a form of action. You have to do something to listen to music, to drink wine, to appreciate a given object. (...) Taste as an action is embedded in a broader context, it is not predetermined: it is directed towards contact (...) to the place and moment of an unexpected flow of sensations" (Hennion, 2007, p. 101). Trying to form a cohesive take on these two visions, it can be noted that music taste is "(...) a dynamic set of musical preferences, a network of various combinations and connections of musical preferences, which is shaped depending on a broader social context and the individual's life experiences (biographical dimension) (Wyrzykowska, 2017 , p. 111).

Are musical preferences (and consequently the music taste shaped on their basis) constant? Literature on the subject fails to give a definitive answer to this question. Undoubtedly, short- and long-term preferences do exist. The former relate to everyday music practices, music listened to on a particular day (by accident or fully consciously). Conversely, long-term preferences are those associated with important life events (e.g., marriage, birth of a child, etc.) and related to strong emotional experiences (Lamont, Webb, 2010, pp. 224-33).

One can also distinguish fixed and situation-based preferences. The first of the aforementioned are those that a person indicates as their primary (i.e. music genres and particular performers one points to when someone asks directly about their musical preferences). In turn, situation-based preferences are "music specific to a given activity or situation, not that indicated by an individual as their favourite" (Wyrzykowska, 2017, p. 170). This is mainly music that facilitates certain specific activities (for example, driving or cleaning one's house), to which, apart from these particular instances, the person does not listen to at all. A survey conducted among Warsaw youth showed that disco polo music, for example, plays this type of role – it is present at various social events (home parties, weddings), even though most respondents declare they do not like this type of music and do not listen to it themselves. Nevertheless, they tolerate its presence at social gatherings and are able to have fun when listening to it (Wyrzykowska, 2017, pp. 170-71).

A clear link can be observed between the musical preferences of any individual and the broader social context. However, there is no agreement among social researchers with regard to the influence social conditions (for example, social background, gender, age, occupation) have versus individual factors on the musical preferences of an individual. This means that emotional, cognitive factors, as well as social factors always need to be given consideration (Konecni, 1982, pp. 497-502).

What influences the differentiation of musical preferences? Music psychology research shows that personality traits and temperament are of paramount importance in terms of individual factors. For example, one study examining the relationship between musical preferences and selected personality traits has shown that people who reported cheerful songs with a fairly conventional structure (i.e. film music, religious, pop, country) as their favourite music, proved to be rather conservative, guarded and extroverted. Meanwhile, respondents who preferred more reflective and complex music (classical, jazz, blues, folk and ethnic music) demonstrated a rich imagination and described themselves as tolerant and intelligent (Rentfrow, Gosling, 2003, pp. 1238-42).

5.2. Methodological note

In this document we refer primarily to quantitative research performed in Poland in the 2016-19 period. Music is not a common topic of social research in Poland, which means there are relatively few empirical studies on musical preferences from the discussed period.

Table 31. Nature of quantitative research used

Name of the study	Scope of the study	Sample size	Method
Listening to music	nationwide	952	CAPI
The popularity of disco polo music	nationwide	952	CAPI
Cultural hierarchy. New distinctions and responsibilities in culture versus social stratification	nationwide	1000	CATI
Musical distinctions. Music taste and social stratification versus the processes shaping Poles' lifestyles	nationwide	2007	CAPI
The music taste of Polish teenagers	nationwide	2069	CAWI

Source: Own work.

At this point, some restrictions in interpretation resulting from the joint presentation of the above-mentioned studies need to be mentioned. First of all, each of them was conducted using a different research method, which renders comparisons more difficult (the same caveat also applies to comparisons with past test results).

Secondly, each study used different questions and answer variants to determine the musical preferences of Poles. For example, in the CBOS music listening study respondents were asked an open question ("What type of music, what genre do you like best?") and then their responses were categorised (CBOS, 2018a, pp. 7-8). Meanwhile, the "Cultural hierarchy" [Polish: *Kulturalna hierarchia*] project also used an open question, but asked about specific artists: "Please enter the name or nickname of your favourite musician/band" (Bachórz et al., 2016, p. 149). The "Musical distinctions" [Polish: *Dystynkcje muzyczne*] study also featured an open question about favourite artists ("Please state what music you like best. Please provide the names of your favourite artists, bands, composers"), but respondents were also asked to rate their fondness or dislike for particular genres ("To what extent do you like the types, genres listed below?"). The different question type and forms (closed or open) means that explicit differences may appear between individual studies in the results for the same or similar music categories.

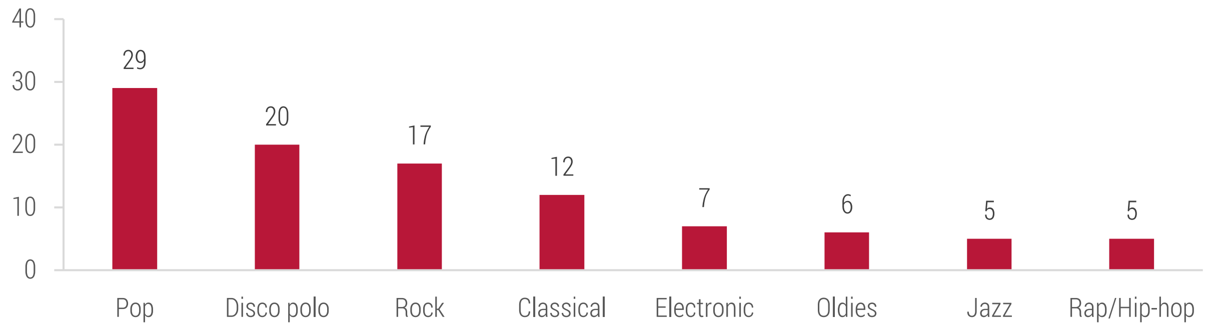
Thirdly, each quantitative study of musical preferences is encumbered with the problem of categorising individual music genres, i.e. to what extent the survey categories correspond to the respondents' perception. This problem applies mostly to broad musical genres (niche music categories are more unambiguous). The "pop/pop music" category probably engenders the biggest interpretative difficulties, because it encompasses a great variety of artists. It includes, for example, ABBA, Irena Santor, Maryla Rodowicz, as well as Madonna, Lady Gaga, Doda and Justyna Steczkowska. Therefore, in these cases it seems necessary to make intra-genre distinctions and create additional sub-categories. Unfortunately, such an approach has been rare in Polish music research in recent years.

Despite the aforementioned limitations, it is worth presenting a summary of the above studies, as this illustrates the dominant tendencies and regularities in shaping the musical preferences of Poles.

5.3. An outline of Poles' musical preferences

The most liked genres are pop (29%) and disco polo (20%). Rock is slightly less popular than disco polo (17%). Classical music received 12% of all indications. Subsequent places in the ranking went to: electronic music (7%), oldies (6%), jazz and rap/hip hop (both genres obtaining 5% of all indications each) (CBOS, 2018a, pp. 8-9). A similar preference distribution was shown in the research conducted in 2008, with pop first (37%), followed by disco polo (29%) and rock (27%). Classical music took 6th place in the ranking with 15% (overtaken by film music and relaxing music) (TNS OBOP, 2008, p. 2).

Figure 74. Musical preferences of Poles (%)



Note: Pop – pop music, entertainment, well-known songs, hits; Rock – rock, hard rock, metal, heavy metal, alternative rock, indie rock, punk, punk rock; Electronic – club music, dance music, techno, house, dance, disco music, electronic music (general); Oldies – old songs, golden oldies, music from one's youth, music from the 1960s/70s/80s/90s.

Source: Own work based on CBOS 2018a, pp. 8-9.

For each of the analysed genres, the largest groups of recipients simply "like" them, while resolute fans (answer "I really like") are less numerous. Pop stands out among all the genres, receiving a total of 72% positive indications (i.e. sum of "I really like" and "I like" responses). The second and third places belong to (similarly to the CBOS study) disco polo (51% of positive responses) and rock (42%), respectively.

Classical music took a strong 4th place in the cited CBOS study. In the "Musical Distinctions" study, folk/traditional music achieved a much higher result (10% of "I really like" and 31% of "I really like"). Furthermore, electronic music had a comparable result to classical music (approximately 24% of positive responses), while country and reggae a slightly lower one (both with about 23% of all positive responses).

Table 32. Like/dislike for selected musical genres (%)

Music genre	I really like	I like	I neither like nor dislike	I dislike	I really dislike
Pop	22	50	14	8	3
Disco polo	18	33	18	19	10
Rock	12	30	21	22	13
Classical music	5	19	21	31	22

Note: The percentages do not add up to 100. The summary omits categories "I don't know such music", "It's hard to say" and "Refusal to answer", as such answers accounted for approximately 1%.

Source: own work based on the "Musical distinctions" survey database.

In the "Musical Distinctions" study respondents also had the opportunity to discuss music genres they do not like. Pop received the smallest number of negative answers ("I dislike" and "I really dislike") with a total of 11% of all the answers. Negative opinions for disco polo amounted to 29% and for rock to 35%. The result obtained by classical music is interesting when compared to the other genres, as it received 53% of all indications (of which 22% were "I really dislike"). Therefore, there is merit in investigating in more detail the relationships between likes and dislikes for the four most popular musical genres from the CBOS study (classical, rock, pop, disco polo). First, let us examine to what extent liking classical music correlates with liking the other three musical genres. Liking classical music is more strongly correlated with a fondness for rock and very poorly with pop. The smallest percentage of those declaring a preference for classical music simultaneously likes disco polo.

Table 33. Liking classical music versus attitude towards rock, pop and disco polo (%)

	Classical music						
		I really dislike	I dislike	I neither like nor dislike	I like	I really like	Total
Rock	I really dislike	36.2	6.4	9.3	7.0	8.0	13.9
	I dislike	8.8	37.2	19.4	17.8	22.0	22.4
	I neither like nor dislike	19.1	21.4	28.9	15.9	16.0	21.1
	I like	26.5	27.6	30.9	40.5	32.0	30.8
	I really like	9.4	7.5	11.5	18.8	22.0	11.8
	Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: own work based on the "Musical distinctions" survey database.

Table 33. Liking classical music versus attitude towards rock, pop and disco polo (%) (continued)

	Classical music						
		I really dislike	I dislike	I neither like nor dislike	I like	I really like	Total
Pop	I really dislike	8.5	1.1	1.7	0.8	4.0	3.0
	I dislike	3.9	12.8	4.8	7.8	15.8	8.3
	I neither like nor dislike	11.4	14.3	21.0	12.2	13.9	14.6
	I like	42.6	53.6	51.9	56.7	49.5	51.2
	I really like	33.6	18.2	20.7	22.5	16.8	23
	Total	100.0	100.0	100.0	100.0	100.0	100.0
Disco polo	I really dislike	15.4	4.9	7.4	11.4	31.0	10.4
	I dislike	12.8	21.1	16.5	21.7	31.0	18.9
	I neither like nor dislike	16.5	14.4	27.3	21.4	14.0	19.0
	I like	29.1	39.1	33.7	34.6	18.0	33.8
	I really like	26.1	20.5	15.1	10.9	6.0	17.9
	Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: own work based on the "Musical distinctions" survey database.

In the case of rock, it is clear that liking rock is often associated with liking classical music. The percentages of people who like or really like classical music are higher among respondents who declare a preference for rock. The preference for rock does not significantly differentiate one's attitude towards pop music. There is a stronger correlation between liking rock and opinions on disco polo – along with an increased percentage of persons declaring they like rock, the preference for disco polo decreases. About 1/5 of those who declare they like rock very much have a positive attitude towards disco polo.

Table 34. Liking rock versus attitude towards classical music, pop and disco polo (%)

	Rock						
		I really dislike	I dislike	I neither like nor dislike	I like	I really like	Total
Classical music	I really dislike	57.9	8.9	20.0	19.1	17.7	22.2
	I dislike	14.4	51.9	32.1	28.4	19.9	31.5

Source: own work based on the "Musical distinctions" survey database.

Table 34. Liking rock versus attitude towards classical music, pop and disco polo (%) (continued)

		Rock					
		I really dislike	I dislike	I neither like nor dislike	I like	I really like	Total
	I neither like nor dislike	14.8	18.7	29.2	21.3	20.8	21.4
	I like	10.0	15.5	14.7	25.9	31.6	19.7
	I really like	3.0	5.0	3.9	5.3	10.0	5.2
	Total	100.0	100.0	100.0	100.0	100.0	100.0
Pop	I really dislike	16.2	1.4	0.5	0.2	1.7	2.9
	I dislike	4.4	20.3	3.9	5.1	5.6	8.2
	I neither like nor dislike	15.1	15.5	23.7	6.5	18.8	14.8
	I like	37.6	48.7	52.5	60.9	43.2	51.1
	I really like	26.6	14.1	19.4	27.3	30.8	23.0
	Total	100.0	100.0	100.0	100.0	100.0	100.0
Disco polo	I really dislike	15.6	5.7	6.7	10.1	21.6	10.5
	I dislike	6.7	16.8	15.4	24.5	31.0	19.2
	I neither like nor dislike	15.6	15.6	21.2	19.5	23.3	18.9
	I like	31.1	41.3	36.6	33.6	16.4	33.6
	I really like	31.1	20.6	20.0	12.4	7.8	17.9
	Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: own work based on the "Musical distinctions" survey database.

The correlation between preference for pop music and classical music is not very strong. It can only be observed that people who really dislike pop relatively rarely like classical music, but this conclusion needs to be treated with caution due to the small size of this subset.

Table 35. Liking pop versus attitude towards classical music, rock and disco polo (%)

		Pop					
		I really dislike	I dislike	I neither like nor dislike	I like	I really like	Total
Classical music	I really dislike	63.8	10.9	17.5	18.5	32.5	22.3
	I dislike	12.1	48.5	30.1	33.0	25.2	31.5
	I neither like nor dislike	12.1	12.1	30.5	21.8	19.2	21.4
	I like	5.2	18.8	16.8	21.8	19.2	19.7
	I really like	6.9	9.7	5.1	5.0	3.8	5.2
	Total	100.0	100.0	100.0	100.0	100.0	100.0
Rock	I really dislike	77.2	7.5	14.1	10.1	15.9	13.8
	I dislike	10.5	55.3	23.4	21.3	13.7	22.3
	I neither like nor dislike	3.5	9.9	33.7	21.5	17.7	21.0
	I like	1.8	19.3	13.7	37.0	36.9	31.1
	I really like	7.0	8.1	15.1	10.0	15.9	11.9
	Total	100.0	100.0	100.0	100.0	100.0	100.0
Disco polo	I really dislike	25.9	12.2	15.8	7.8	10.0	10.4
	I dislike	8.6	42.1	19.6	17.5	16.2	19.3
	I neither like nor dislike	8.6	13.4	25.1	16.5	23.0	18.8
	I like	27.6	19.5	22.7	41.8	28.1	33.6
	I really like	29.3	12.8	16.8	16.4	22.8	18.0
	Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: own work based on the "Musical distinctions" survey database.

A positive correlation is visible between an increased preference for pop and an increased preference for rock. In addition, respondents declaring to like pop, indicate they like disco polo slightly more frequently than others.

The table illustrates the correlation between a preference for disco polo and a like/dislike of the three other genres.

Table 36. Liking disco polo versus attitude towards classical music, rock and pop (%)

		Disco polo					
		I really dislike	I dislike	I neither like nor dislike	I like	I really like	Total
Classical music	I really dislike	33.2	14.9	19.4	19.3	32.3	22.2
	I dislike	14.6	35.6	23.9	36.3	35.7	31.5
	I neither like nor dislike	15.1	18.4	30.6	21.4	18.1	21.3
	I like	21.5	22.9	22.3	20.2	12.2	19.8
	I really like	15.6	8.2	3.8	2.7	1.7	5.1
	Total	100.0	100.0	100.0	100.0	100.0	100.0
Rock	I really dislike	20.4	4.8	11.3	12.7	23.9	13.8
	I dislike	12.1	19.7	18.6	27.6	25.9	22.5
	I neither like nor dislike	13.6	17.0	23.7	23.1	23.6	21.1
	I like	29.6	39.4	31.8	30.8	21.4	30.8
	I really like	24.3	19.1	14.6	5.8	5.1	11.8
	Total	100.0	100.0	100.0	100.0	100.0	100.0
Pop	I really dislike	7.3	1.3	1.3	2.4	4.8	2.9
	I dislike	9.8	18.1	5.9	4.8	5.9	8.3
	I neither like nor dislike	22.4	15.0	19.7	9.9	13.8	14.7
	I like	38.5	46.5	45.0	63.7	46.6	51.2
	I really like	22.0	19.2	28.0	19.1	28.9	22.9
	Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: own work based on the "Musical distinctions" survey database.

As the positive attitude towards disco polo grows, the preference for classical music and rock falls. However, a weak positive correlation can be observed between the degree to which one likes disco polo and their preference for pop – those who like disco polo are slightly more likely than other respondents to like pop music.

5.4. Preference and recognition of individual artists

In the "Cultural hierarchy" [Polish: *Kulturalna hierachia*] study, the authors decided to investigate whether Poles prefer local or foreign artists. Their analyses have led them to conclude that "The Polish music taste (...) is very traditional. We listen almost exclusively to popular music, mostly Polish artists and bands, often those formed many years ago." (Bachórz et al, 2016, p. 48). This is an interesting observation considering the results of the 2008TNS OBOP survey, which showed that 59% of respondents listened to both Polish and foreign music. Only Polish music was listened to by 31% of respondents, while 10% declared to enjoy only foreign music (TNS OBOP, 2008, p. 2).

At this juncture, it is worth examining to what extent Poles know (or at least have heard) selected Polish and foreign composers and artists. In the "Musical Distinctions" [Polish: *Dystynkcje muzyczne*] study respondents were asked whether they know and like 35 artists (the list included a complete cross-section of artists – from classical music composers to contemporary popular artists) – 16 foreign and 19 Polish. It turns out that the respondents know local artists better, regardless of the era represented by the said artists (with the exception of Kapela ze Wsi Warszawa, which 24% of respondents declared to know).

Table 37. Recognition of selected artists, bands, composers (%) - select examples

Artist	Yes	No
Johann Sebastian Bach	75	25
Wolfgang Amadeus Mozart	74	26
Richard Wagner	46	54
Mieczysław Fogg	66	34
Zbigniew Wodecki	93	7
Marek Grechuta	82	18
Maryla Rodowicz	95	5
Lady Pank	86	14
Bayer Full	68	32
Doda	86	14
Piotr Rubik	76	24
Sławomir	84	16
Kapela ze Wsi Warszawa	24	76
Louis Armstrong	58	42
The Beatles	84	16
ABBA	58	42
Boney M.	72	28
Metallica	61	39
Eminem	55	45
Rihanna	65	35
Adele	64	34
Ed Sheeran	51	49

Source: own work based on the "Musical distinctions" survey database.

Among foreign performers, composers of classical music (Bach and Mozart, both of whom received over 70% positive responses, while Wagner got 46%) and artists with a long-established position in the music world (The Beatles, Metallica, Rihanna) see the highest level of recognition. The high result obtained by Bach and Mozart may stem from, among other factors, their presence in the universal music education curriculum, as well as in pop culture (biographical films, music used in advertisements, etc.). Richard Wagner is a composer with a much smaller presence in Polish cultural discourse, which translates into his results in the survey (46%).

5.5. Musical preferences versus social stratification

Capturing the nature of Poles' musical preferences requires one to look through a paradigm of socio-demographic variables that can differentiate the range of preferred content. The table presents the percentage distributions of

Poles' musical preferences divided by gender. The following summary shows that it is difficult to explicitly divide music genres into either female or male.

Table 38. Musical preferences versus gender (%)

Musical genre	Women	Men
Pop	31	23
Disco polo	20	19
Rock	14	19
Classical	13	9
Electronic	3	10
Jazz	5	4
Hip-hop/Rap	2	7
Oldies	7	5

Source: Own work based on CBOS 2018a, p. 9.

The noticeably greater interest in pop music (31%) among women is definitely noteworthy. In turn, genres such as rock, electronic music and hip hop/rap have more fans among men, but in the case of electronic music and hip hop/rap, the number of indications for the entire sample is relatively low, so it is difficult to formulate definite conclusions on preference for these two genres among women and men (CBOS, 2018a, p. 9). Some of the above regularities can also be seen in the results of previous studies. Similarly to the discussed CBOS survey, the Statistics Poland (GUS) survey from 2009 showed a greater interest in classical music among women and in hip hop/rap among men. Unfortunately, nothing can be said about pop, rock or disco polo based on the GUS report – the first two were combined into one and disco polo is not featured at all (GUS, 2012, p. 298).

Table 39. Musical preferences versus age group (%)

Age group	Pop	Disco polo	Rock	Classical	Electronic	Jazz	Hip hop/rap	Oldies
18 – 24 years old	25	13	23	5	13	6	17	0
25 – 34	37	17	25	6	14	6	13	2
35 – 44	30	21	24	8	8	4	3	0
45 – 54	26	24	20	12	6	3	0	4
55 – 64	26	21	8	12	2	6	1	12
65 years and older	19	18	3	19	1	1	0	13

Source: Own work based on CBOS 2018a, p.9.

The above summary shows a negative correlation between an interest in rock, electronic music, hip hop/rap and the age of respondents. Meanwhile, in the case of classical and oldies music, one can observe a rise in the number of indications as the age of respondents increases. The 25-34 group clearly stands out among pop music fans (CBOS, 2018a, p. 9).

In the case of the four most popular music genres, i.e. pop, disco polo, rock and classical music, education presents itself as a factor significantly differentiating preferences. Among the respondents who stated that pop is their favourite music genre, most are people with secondary (30%) and higher education (42%).

Table 40. Musical preferences versus education (%)

Education	Pop	Disco polo	Rock	Classical	Electronic	Jazz	Hip hop/rap	Oldies
Primary / middle school	15	30	7	5	5	0	4	9
Vocational	18	32	7	4	2	0	2	5
Secondary	30	16	19	13	11	4	6	6
Higher	42	4	29	20	7	11	5	4

Source: Own work based on CBOS 2018a, p. 9.

An increase in education level corresponds to a higher percentage of indications of rock and classical music. In turn, disco polo is indicated as the favourite genre mainly by people with primary/middle school (30%) and vocational (32%) education (CBOS, 2018a, p. 9). Disco polo was most often chosen by inhabitants of villages and small towns, and least often by those from large cities.

Table 41. Musical preferences versus the respondent's place of residence (%)

Place of residence	Pop	Disco polo	Rock	Classical music	Electronic music	Jazz	Hip-hop/rap	Retro
Countryside	24	27	13	4	7	1	4	6
Small city	27	20	21	14	6	3	8	2
Medium-sized city I	29	12	16	15	7	5	5	6
Medium-sized city II	32	19	13	14	5	9	4	7
Large city	30	6	32	26	9	10	1	8

Note: Small city: up to 19,999 inhabitants; Medium-sized city I: 20,000 – 99,999; Medium-sized city II: 100,000 – 499,000; Large city: 500,000 and more.

Source: Own work based on CBOS 2018a, p. 9.

The inhabitants of large cities dominate among rock and classical music lovers. In the case of pop music, the respondents' place of residence is not that significant (when compared to other genres) (CBOS, 2018a, p. 9).

In 2018, CBOS also prepared a separate report on disco polo. In some ways it is a continuation of the research performed in 1996 regarding Poles' attitudes towards this genre.[38] Over the 22 years separating the two studies, the opinion on disco polo has remained practically unchanged (CBOS, 1996, p. 2; CBOS, 2018b, p. 2).

If the sum of positive responses (i.e. "I really like" and "I rather like") is considered, disco polo received less than 50% of positive responses only in three categories: management and specialists with higher education (31%), administrative and office employees (41%), and pupils and students (45%). Exactly 50% of positive declarations were recorded among those qualified as medium-level staff and technicians.

[38] It has to be noted that certain methodological limitations apply to both studies. Answers to the question "Do you like disco polo?" do not feature a neutral response (e.g.. "I neither like nor dislike"). There is also no "I don't know such music". Aside from positive variants ("I really like" and "I rather like") and negative variants ("I rather dislike" and "I really dislike") the respondents had the option to answer "Difficult to say", but only 3% of the respondents chose it. No neutral variant can influence the obtained results. It cannot be ruled out that those with a neutral attitude towards disco polo chose "I rather like".

Table 42. Preference for disco polo and division by social and professional group (%)

Social and professional group	I really like	I rather like	I rather don't like	I really dislike	Difficult to say
Management, specialists with higher education	10	21	32	33	3
Medium-level staff, technicians	9	41	33	8	9
Administrative and office employees	5	36	28	27	4
Services employees	20	49	20	11	-
Skilled workers	27	52	9	8	4
Unskilled workers	34	35	17	13	-
Farmers	27	63	7	3	-
Self-employed	14	46	21	14	6
Unemployed	46	41	11	2	-
Retired	26	39	21	10	4
Pensioners	46	35	12	5	2
Pupils and students	5	40	38	14	3
Housewives and others	40	34	15	9	2

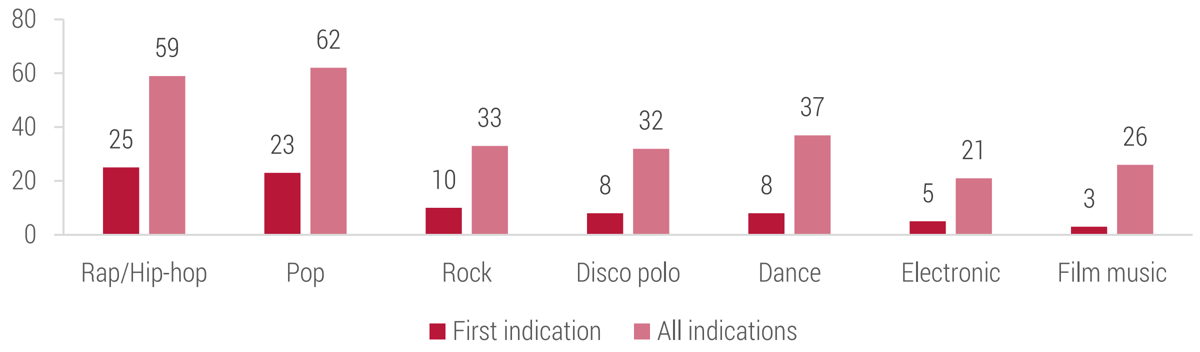
Source: Own work based on CBOS 2018b, p. 8.

The highest percentage of positive choices for disco polo was obtained among farmers (90%), the unemployed (87%) and pensioners (81%).

5.6. Musical preferences of young people

When analysing musical preferences, the music interests of young people merit a more detailed investigation. The importance stems from the importance of music plays in this period of life (see, for example, Kłosiński, 1984, Wyrzykowska, 2017). This is confirmed by the results of the National Centre for Culture Poland (NCK) – as many as 99% of the surveyed teenagers (12-17 years old) listen to music. The ranking of the most popular genres was prepared based on genres indicated first (Figure 3).

Figure 75. Musical preferences of teenagers



Source: own work based on NCK, 2019, online.

Young people most often declare they listen to rap / hip hop (25%). Pop music received slightly fewer answers (23%). Rock (10%), disco polo (8%) and dance (8%) came next. However, if all responses are considered, pop takes first place (62%). Rap/hip hop music is second (59%). Dance music occupies the last place on the podium (37%) (NCK, 2019, online). The top ten ranking of favourite artists includes six Polish and four foreign artists (Table 14).

Table 43. Recognition of selected artists, bands, composers (%) - selected examples

LN	Artist's name	Number of responses
1	Paluch	80
2	Rihanna	76
3	Szpaku	70
4	Arianna Grande	68
5	Eminem	67
6	Quebonafide	63
7	Boys	61
8	Taco Hemingway	60
9	David Guetta	59
10	Bedoes	56

Note: Respondents indicated their favourite artists in the genre they most often listened to.

Source: own work based on "What are the music tastes of Polish teenagers?" [Polish: Jakie są gusta muzyczne polskich nastolatków?*], NCK, 2019, online.*

The Polish rapper Paluch came first. Behind him were the American singer Rihanna and another rapper from Poland – Szpaku. The last three places are taken by the Polish rapper Taco Hemingway, the French DJ and producer David Guetta, and another Polish rapper – Bedoes (NCK, 2019, online).

Among teenagers listening to rap/hip hop, the four rappers in the table above are the most popular artists. Meanwhile, those listening to pop usually indicate foreign artists as their favourites. The top five are: Rihanna, Arianna Grande, David Guetta, Michael Jackson and Ed Sheeran. People listening to rock most often mentioned Queen and Metallica. The author of the NCK report noted, however, that a biographical film about Queen was playing in cinemas at the time of the study, which could, to some extent at least, lead to a higher number of responses (NCK, 2019, online).

NCK research shows that girls and boys listen to similar music, but differ in terms of the type of music enjoyed most often. Boys more often selected rap (boys – 30%, girls – 20%) and electronic music (boys – 7%, girls – 3%) as their number one. In turn, girls were more likely to indicate pop (girls – 29%, boys – 18%) and dance (girls – 11%, boys – 6%) (NCK, 2019, online).

Table 44.Musical preferences of girls and boys (%)

Music genre	First answer - girl	First answer - boy
rap, hip hop	20	29

pop	29	18
rock	10	10
disco polo	8	9
dance	10	6
electronic	3	7
film music	4	3

Source: own work based on "What are the music tastes of Polish teenagers?", NCK, 2019, online.

In addition, the study showed a weak influence of the type and size of the place of residence on the respondents' selection of music genres. For example, contrary to common perceptions (cf. Mirowska 2013), the popularity of rap is comparable in large and medium-sized cities (59%) and the countryside and small cities (60%). Also, the interest in disco polo is not much higher in the countryside and cities with up to 20,000 inhabitants (36%) than in cities with more than 20,000 inhabitants (28%) (NCK, 2019, online).

Furthermore, researchers from the National Centre for Culture observed a correlation between the musical preferences of the studied youth and their parents' level of education. In the entire surveyed group, 35% of the respondents declared their mother had higher education and 25% that their father did. The highest percentage of parents with higher education was noted among young people listening to rock.

Table 45. Music genres teenagers listen to versus higher education of their parents (%)

Listened-to music genres	Higher education	
	mother	father
rock	45	35
electronic music	37	28
pop	36	26
dance	31	24
rap, hip-hop	30	22
disco polo	23	14

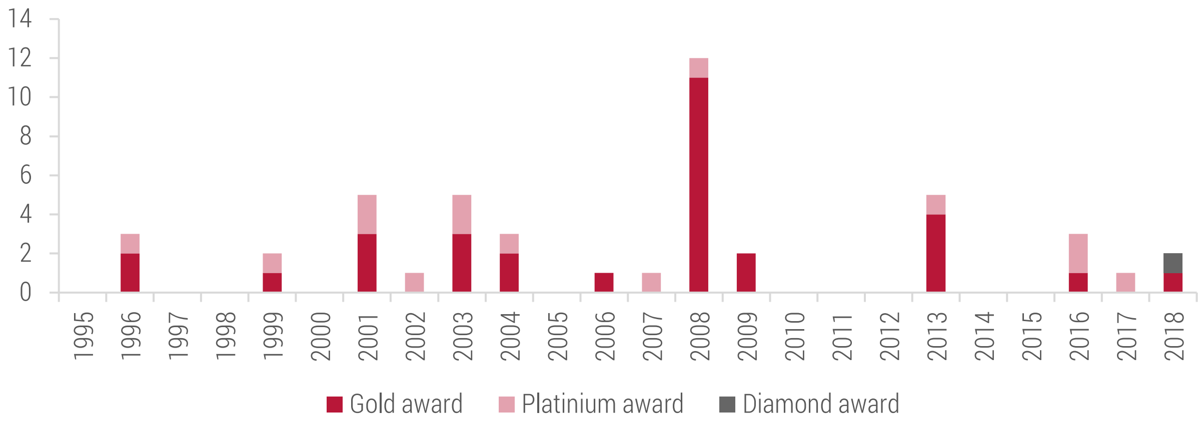
Source: own work based on "What are the music tastes of Polish teenagers?", NCK, 2019, online.

The education of parents of those listening to electronic and pop music is comparable. The lowest percentage of parents with higher education (23% of mothers and 14% of fathers) was noted among respondents listening to disco polo (NCK, 2019, online).

5.7. Music preferences, phonographic market and musicians' popularity

The characteristics of Poles' musical preferences coincide with the conclusions of the phonographic market analysis. Artists performing popular music and hip hop are among the most popular in terms of sold albums. Pop and hip hop are also the most frequently indicated genres in preference research. Pop music records reach a wide spectrum of audience, hip hop artist rather sell their music to younger listeners. Poles are more eager to buy and listen to CDs of Polish musicians (Tables 5, 7, 9 in Chapter 1), which is also reflected in the cited preference research (e.g. TNS OBOP, 2008, p. 2). Preferring disco polo does not translate into the sales of physical records (Figure 76), but it can affect the popularity of artists on TV and YouTube.

Figure 76. Certifications granted to Polish rappers for the number of records sold in 1995-2018



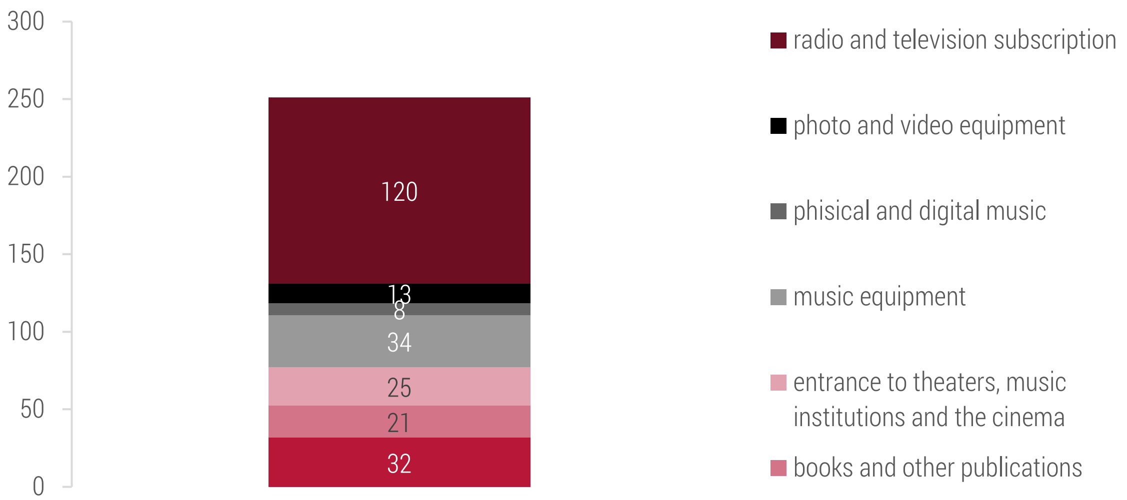
Note: figure depicts only physical recordings certificates.

Source: own work based on ZPAV data

The last available study conducted on a representative group of respondents, about the consumption of cultural goods, was developed by the Statistics Poland in 2014:

- In 2014, the average Pole spent 7.68 PLN per year on audio and video records,
- 51% of households collects records,
- 25% of households bought at least one record in 2014 (0.7% vinyl, 24.5% at least one music CD or DVD).

Figure 77. Poles culture spending in 2014



Notes: doesn't account for school textbooks and other books. Television without charges for other services in the telecommunications package.

Source: Population participation in culture in 2014 (GUS).

6. Institutional support for the Polish music market

The purpose of the chapter was to examine institutional support for the Polish music market using the desk research method. The intended effect was to identify entities supporting the music industry and the forms of assistance assured. With the said research defined it was possible to delineate the field of analysis, which consisted of the activities of the state (Ministry of Culture and National Heritage [MKiDN], institutes), the market (media), non-governmental entities (associations, foundations, associations managing copyrights) and the two main support vectors – direct (programmes, scholarships, competitions, awards) and indirect (promotion, dissemination).

1. The activities of state and industry institutions are the first area of music market support. Among public institutions, the main entities include the Ministry of Culture and National Heritage [MKiDN], the institutions it supervises that deal with music, e.g. the Institute of Music and Dance, the Polish Music Publishing House, the Fryderyk Chopin Institute, the Adam Mickiewicz Institute, as well as municipal and voivodeship-level governments.
2. Institutions from the non-governmental sector mainly include associations and foundations, e.g. the Meakultura Foundation, the Association of Polish Music Artists, the Polish Music Foundation, the Independent Polish Recording Association [Polish: *Stowarzyszenie Niezależna Fonografia Polska*], as well as trade unions and collective management organisations (e.g. ZAIKS, ZPAV, STOART, SAWP).
3. Another group are various co-operation networks, which most often unite smaller entities from the non-governmental sector, e.g. the Music Export Poland Foundation, the Alliance of Independent Music Producers and the Polish Music Council. It can be said that the activities of these entities are directly focused on supporting artists and developing the music market in Poland and abroad. The analysis of this area consisted mainly of recognising the number and nature of instruments supporting the music market, the artists and their beneficiaries.

Another area in which support for the music market in Poland can be noted are the media, in particular those dealing with music (television, radio, magazines and publications). Their primary focus is on disseminating and propagating songs and musical knowledge, as well as promoting the artists themselves. However, contemporary media activities are very commercial in their nature, which does not always translate into substantive support. The analysis mainly consisted of determining the number, type of media, their coverage, as well as an attempt to examine the music journalists community in Poland.

The third area that can be considered as a form of support for the music market are various industry events, such as fairs, conferences, competitions and music awards. These are very diverse in nature - ranging from scientific to business, although the former are the majority, especially in the competitions and conferences categories. The analysis mainly consisted in determining the number and the nature of events in each category.

It was based on existing data in the form of information on the websites of the analysed entities, as well as public statistical data. The said data comprised primary and secondary information (analyses, summaries, databases). The analysis was quantitative and qualitative. The quality, availability and timeliness of the data showed great variability, which influenced the analytical possibilities in individual areas. Despite advanced digitisation, digital archiving and computerisation possibilities, which allow information about activities to be documented and publicised, it was impossible to access a lot of the data. The nature of the data itself (so-called existing data, not researcher-provoked) also imposed limitations, as the analysis process could not extend beyond what the analysed entity was willing to share. For the purpose of reliability and accuracy of future analyses, it would be beneficial to include other methods, enabling researchers to obtain knowledge at a deeper level.

6.1. Activities of state, local government and industry institutions

Activities of state and local government institutions

Analysis in this scope has been divided into two sections. The first, nationwide, covers the activities of the Ministry of Culture and National Heritage and public entities under the Ministry's auspices, such as the Institute of Music and Dance, the Adam Mickiewicz Institute, the Fryderyk Chopin Institute and the National Audiovisual Institute. The second, at the local government level, pertains to the activities of local government authorities at the voivodeship level (marshal offices) and at the city level (municipal offices of voivodeship capitals).

Public support mechanisms are clearly and strictly defined (mainly scholarships, awards, competitions), which stems from the laws governing public entities. Rarely are they constructed solely with representatives of the music industry in mind. Support mechanisms for music market representatives (other than artists) are also difficult to find. These mechanisms are divided into those **supporting the artists themselves** and **institutional entities** that are not a direct participant in the music market (associations, foundations, cultural institutions, etc.). Programmes conducted by the Adam Mickiewicz Institute are an exception, as managers or music producers can be their beneficiaries. The state and its bodies support the music market through various incentives for creators (scholarships), and subsequently reward those who achieve success, often also commercial. In addition, the state organises programmes and competitions for entities from the music industry. However, instruments that would help enliven the music market itself are lacking.

The following nationwide forms of support were identified: state support programmes, state scholarships and grants, state awards and decorations. It should be noted at the outset that support in any form is only sporadically addressed only to artists/entities active in the music industry. The vast majority of programmes, scholarships and awards are dedicated to culture as a whole, construed as per the Act of 25 October 1991 on the organisation and conduct of cultural activities (Journal of Laws of 2018, item 1983, and of 2019, item 115) as artistic activities and dissemination of culture. Most of the available support forms do, however, include a "music" category, which allows them to be considered as assistance to the music industry. In total, 24 programmes were identified in 2019. These comprise programmes headed by the Minister (4), programmes implemented by individual institutions (18), and programmes implemented from European funds (2).

Table 46. Operator and number of state support programmes

LN	Operator	Name	Number
1.	Ministry of Culture and National Heritage	*EEA Financial Mechanism 2014-2021*	1
2.	Institute of Music and Dance	*Krytyka muzyczna 2.0* *Białe plamy – muzyka i taniec* *Dyrygent – rezydent* *Scena dla Muzyki Polskiej* *filharmonia/ostrożnie, wciąga!!!* *Jazzowy debiut fonograficzny* *Szkoła mistrzów budowy instrumentów ludowych* *Muzyka* (programme of the MKiDN) *Muzyczny Ślad* (programme of the MKiDN) *Moniuszko 2019 – promesa* (programme of the MKiDN) *Zamówienia kompozytorskie* (programme of the MKiDN)	11 (including 4 programmes of the MKiDN)
3.	Adam Mickiewicz Institute	*Polska 100* *Open Poland* *I CULTURE Orchestra* *Azja* *Don't Panic! We're from Poland* *Polska Music* *Kultura Polska na Świecie* *Open Call na Womex 2019* *Open Call na Classical: Next 2019* *Zagraj to!* *Kreatywna Europa 2014-2020*	11
4.	Fryderyk Chopin Institute	*Młode Talenty*	1

Source: own work

The beneficiaries of these programmes are individuals (artists, pupils, students, managers, scientists), institutional entities (non-governmental organisations, cultural institutions, local government bodies) and entrepreneurs. Unfortunately, it has not been possible to obtain detailed information on the beneficiaries of every programme, because they are not always stated clearly in the descriptions. Thanks to the conducted quantitative analysis, it is possible to determine that the main beneficiaries of the programmes are cultural institutions, artists and bands, as well as non-governmental organisations, even though institutional entities have an advantage over non-associated artists. This demonstrates that support given in the form of programmes is mainly dedicated to entities in the music market domain.

Table 47. Types of beneficiaries of state support programmes

LN	Type of beneficiary	Number of programmes
1	Cultural institutions	11
2	Artists/bands	8
3	Non-governmental organisations	7
4	Promoters, managers, publishers	6
5	Entrepreneurs	5
6	Churches, religious associations	5
7	Higher education, schools	4
8	Other	4
9	Promoters, scientists	3
10	Local government bodies	3
11	Natural persons	1

Note: The sum of all the programmes in the table is greater than 24 (the number of identified programmes), as most of them are dedicated to several categories of beneficiaries.

Source: own work

Both financial and promotional support is provided under the programmes. There are six Adam Mickiewicz Institute programmes, three Institute of Music and Dance programmes and one Fryderyk Chopin Institute programme just for music industry representatives (artists, promoters, publishers, managers). The *Creative Europe 2014-2020* programme is a unique case. It featured two priorities dedicated to the audiovisual industry and music artists (*European platforms*, *European networks*), but the last calls for proposals were in 2016 and 2017. Their current status is unknown.

The Ministry of Culture and National Heritage's programme *Development of creative* can also be said to offer support to the music industry. Applicants may include entities from the music and audiovisual sector (although only those that are local government cultural institutions, non-governmental organisations, economic operators). Subsidies can be obtained for educational activities, building cooperation networks, research projects, supporting exports, product prototyping and development, as well as creating artistically innovative music videos.

Scholarships and grants are another way of providing support to artists, especially younger (up to 35 years old). The Ministry of Culture and National Heritage is the sole administrator of the funds. Four types of scholarships available to representatives of the music community have been identified (*Creative scholarships and scholarships for promoting culture*, *Scholarships for art school students*, *Scholarships of the Minister of Culture and National Heritage for students of art universities*, *Foreign scholarships*). It should be underlined that these scholarships are not dedicated only to musicians, but to representatives of all artistic categories. The scholarships are financial in nature and can be used for various purposes, usually stipulated in their terms and conditions. And so, *Creative scholarships* are awarded to natural persons who present their own creative project for the implementation of their undertaking, *Scholarships for art school students* are awarded to art school students for artistic achievements (good academic performance + winning national or international competitions), *Scholarships for students of art universities* are for students with significant scientific or artistic achievements related to their studies, while *Foreign scholarships* can be used, for example, for artistic internships abroad. In the case of scholarships for pupils and students, the school or university acts as the intermediary body disbursing the scholarship. The amounts usually depend on the budget of the Ministry of Culture and National Heritage, while the duration varies from three months to a year. Another form of support provided by the Ministry is social aid for artists and creators finding themselves in a difficult financial situation. The aid is one-off in nature and transferred directly to the beneficiary.

Awards and decorations are the last type of support. The Ministry of Culture and National Heritage has six instruments at its disposal. These are three dedicated awards (*Annual Award of the Minister of Culture and National Heritage*, *Annual Award of the Minister of Culture and National Heritage for Patrons of Culture*, *The Oskar Kolberg Prize "For services to folk culture"*) and occasional awards. The Minister also awards the *Medal for Merit to Culture – Gloria Artis* and the *Decoration of Honour "Meritorious for Polish Culture"*. The awards are both symbolic (statuettes, diplomas) and financial. As is the case with programmes and scholarships, these are not mechanisms addressed only to music industry representatives, but to the art community as a whole. They are given to natural persons or groups of natural persons, who rendered a particular contribution to the development, dissemination and protection of culture. Under the Act of 25 October 1991 on the organisation and conduct of cultural activities (Journal of Laws of 2018, item 1983, and of 2019, item 115) the Minister of Culture and National Heritage awards the "Merit to Culture Gloria Artis" medal at the request of ministers or heads of state offices, rectors of universities, voivodeship marshals, voivodes, statutory leadership of national social organisations or associations conducting statutory cultural activities, or heads of diplomatic or consular missions of the Republic of Poland. It is awarded to persons of particular distinction in the field of artistic creativity, cultural activities or protection of national culture and heritage. The "Meritorious for Polish Culture" decoration is awarded to people who distinguish themselves in creating, disseminating and protecting culture. The decoration is awarded by the Minister of Culture and National Heritage. The awards and decorations are an important means of confirmation and recognition of artistic activities, while assuring financial support for the beneficiaries at the same time.

The activities of the National Audiovisual Institute operating under the Ministry of Culture and National Heritage, which is mainly tasked with digitising cultural events of various types, can also be considered as a particular type of support. The Ninateka includes documentary and feature films, reportages, animated films, experimental films, recordings of theatre and opera performances, recordings of concerts, reports documenting cultural and social life, as well as radio programmes.[39] NInA also acts as the publisher of an online magazine dedicated to culture *dwutygodnik.com*.

The Polish Music Publishing House [PWM] operates based on similar principles. It specialises in publishing sheet music and books pertaining to classical, jazz and film music. The publications are dedicated to children, recognised artists, orchestras, lecturers and music lovers. This institution also operates a media centre, which makes events, interviews, music, magazines, materials available to the media and provides links to composer websites. It publishes three magazines (*Kwarta*, *Quarta*, *Scala*), acts as a patron and promoter of contemporary music – since 2002 it has been organising the Tadeusz Ochlewski Composition Competition for composers under 30 years old. It also represents many major foreign publishers in Poland, including Schott Music, Boosey & Hawkes, Edition Peters, Universal Edition Wien, Music Sales.[40]

Local government bodies also provide support for artists and creators, including musicians. This analysis focuses on regional and municipal local government, limited to voivodeship capitals. In numbers, 16 marshal offices and 18

[39] https://www.nina.gov.pl/ [retrieved on 20/08/2019]

[40] https://pwm.com.pl/pl/stronaglowna/ [retrieved on 20/08/2019]

city offices were analysed (Kujawsko-Pomorskie and Lubuskie Voivodeships both have two capitals). An analysis of the websites of marshal offices and press information has allowed 15 different scholarships to be identified. The greatest number of scholarships is awarded in the Podlaskie and Zachodniopomorskie Voivodeships (two scholarships each), with one type of artistic scholarship usually established in other voivodeships. They are mostly intended for pupils and students of art schools or persons involved in artistic creation, dissemination of culture or protection of cultural heritage. In most cases, local authorities have also specified a purpose for the scholarship funds.

Table 48. Type of beneficiaries and purpose of regional scholarships

	Category	Number of scholarships
Type of beneficiary	Persons involved in artistic creation, dissemination of culture and protection of cultural heritage	11
	Pupils and students	7
	Talented persons in a difficult financial situation	1
Purpose	For an art project	10
	For artistic development (studies, courses, purchase of an instrument)	3
	For own purposes	4

Note: The sum of scholarships in the table will be different from the sum of scholarships awarded by marshal offices, as some of them are dedicated to several types of beneficiaries simultaneously and therefore for different purposes.

Source: own work

The second instrument used to provide support to the artistic (including music) community are awards. A total of 17 were found at the voivodeship level. The greatest number of awards are given in the following voivodeships: Małopolskie (three types), Łódzkie, Śląskie and Świętokrzyskie (two types each). Awards are most often given for outstanding artistic achievements and artistic activities aimed at disseminating culture in a given region or promoting the said region. The potential recipients are natural and legal persons, individuals and bands, both young and experienced. Awards, those of a financial nature in particular, are without doubt an important source of support for artists and their activities.

Table 49. Type and number of regional award beneficiaries

LN	Type of beneficiary	Number of awards
1	Natural person	12
2	Legal person/institution	7
3	Pupils, students, persons under 35 years of age	4
4	Bands/groups	4

Note: The sum of the prizes is not equal to the sum of all awards identified at the voivodeship level, as an award can be given in a number of categories and to several types of beneficiaries.

Source: own work

At this juncture, another, less formal, music market support system should be mentioned, one implemented by the Małopolskie Voivodeship. It is the JAZZ-IT-UP Project – a jazz calendar for Lesser Poland (www.jazzitup.pl). The project is implemented by the Małopolskie Voivodeship, in cooperation with cultural centres, clubs, festivals and jazz centres from Kraków and the Lesser Poland region, and includes a list of jazz concerts in clubs, at festivals and music stages in Kraków, Tarnów, Wadowice, Lusławice, Czchów and Jaworki.[41] It pertains to one music genre, but shows how public institutions can provide informational support to the music market in a particular region or city. Other voivodeships and cities also have websites or magazines/guides in the form of event calendars that aim to promote specific cultural events, including musical ones.

At the city level, four forms of support have been distinguished: awards (24), scholarships (19), programmes (4) and grants (1). The city of Gdańsk is the undisputed leader, generously rewarding artists with five different awards, three scholarships and through one implemented programme. Only two cities have established awards dedicated *strictly* to musicians - in Wrocław the *Wrocław Music Award* and in Olsztyn the *Feliks Nowowiejski Mayor's Award in Musical Arts*. In Gdańsk, Łódź and Katowice, programmes have been launched that provide artists with premises for conducting arts activities from city resources. The authorities in Kraków implement a similar programme, but dedicated exclusively to visual artists. The awards are given for achievements, accomplishments, artistic achievements and are addressed to natural persons, legal persons, bands and events. Scholarships are meant for creators, students, pupils, groups and in most of the analysed cases are earmarked for an artistic project/undertaking (8) that can additionally contribute to the development of individual industries, for artistic development (2), for own purposes (2), are paid out for achievements (1).

Table 50. Type and number of city award and scholarship beneficiaries

Type of support	Type of beneficiary	Number
Award	Natural person	18
	Legal person/institution	4
	Pupils, students, persons under 35 years of age	3
	Bands/groups	3
	Event	1
Scholarship	Pupils, students, persons under 35 years of age	8
	Natural persons	10
	Bands/groups	1

Note: The sum of the prizes is not equal to the sum of all awards identified at the city level, as an award can be given in a number of categories and to several types of beneficiaries. The same applies to scholarships.

Source: own work

In addition, due to continued activities under the European Capital of Culture Wrocław 2016, the city authorities offer two additional support instruments in the form of microgrants for residents wishing to organise art events and AIR Wro,[42] a programme for representatives of creative and academic communities active in contemporary culture and art, which consists of study visits. One of the permanent modules of the programme is Mobile Culture – a mobility support tool for creators from Wrocław and Lower Silesia aimed at helping them implement and promote their projects abroad. Another unique support instrument are the activities of the Kraków Festival Office [KBF].[43] It implements and promotes large cultural events on a local, national and international scale. This includes

[41] www.jazzitup.pl [retrieved on 15/08/2019]

[42] https://strefakultury.pl/programy/air-wro/o-programie/ [retrieved on 15/08/2019]

[43] https://www.biurofestiwalowe.pl/ [retrieved on 15/08/2019]

musical events of the highest calibre appreciated by international critics – *the Misteria Paschalia festival*, *Sacrum Profanum*, *Film Music*, *Opera Rara*, *Etno Kraków/Rozstaje* and many others. KBF works together with producers and persons implementing large projects, as well as world-class artists. Such activities are worth imitating and copying. Meanwhile, Katowice is where Silesia – An Institution for the Promotion and Dissemination of Music (www.silesia.art.pl) operates. It conducts various activities aimed at supporting artists and the music market, from a concert calendar, festivals, financial programmes, to a publishing house.[44]

Activities of industry entities

Within the scope of industry entity activities, the operations of NGOs, rights management associations, as well as other associations and clusters were analysed. In December 2018, there were about 26,000 foundations and 117,000 associations registered in Poland – totalling 143,000 social organisations. However, only about 80,000 of them are active. Those active in the fields of art and culture constitute 14% of the total. Their activities consist of, for example, organising fairs, festivals, cultural education, activities supporting regional traditions.[45] Unfortunately, desk research has not yielded an exhaustive list of associations and foundations active in the musical field, as such data is not publicly accessible. Based on the data made public for the needs of the study, over 100 such entities were identified. Organisations bring together creators in the fields of culture and science, artists, musical life promoters and music lovers. They operate in different ways, focusing on promoting and disseminating the artistic achievements of a patron, a particular music genre, education, organisation of competitions and festivals, enlivening the community and awarding prizes. Associations and foundations are the primary organisers of musical life, creating many international and national events, hosting concerts, meetings and workshops.

The activities of industry entities seem to be significantly more focused on directly supporting the music market. Their endeavours are closer to actual music life in Poland, as their organisers and members are usually directly involved in the music industry. The statutes of the analysed organisations point to a rather wide scope of activities, but ascertaining the actually implemented number is difficult. There are several categories of industry body activities. The first is **legal action** (among others: providing assistance in court cases, legal advice, making model documents available, publishing legal decisions, copyright protection, representing artists). The second – **assistance** consisting in paying out aid to artists in a difficult material or personal situation. The third consists of **promotional activities**, such as awarding prizes, scholarships and distinctions. The fourth category are **activities related to disseminating knowledge about music**, which includes work in the educational, publishing, documentation and informational fields. The last are **organisational activities**, which involve the organisation of concerts, contests, festivals, conferences, workshops, training sessions, etc. (although the latter are the least common). Research activities that could be useful in diagnosing the music market are poorly developed. It seems that the nature of the above activities is not primarily business-related. Copyright management, collection, distribution and payment of remuneration due to performing artists can be considered as the business domain of industry body activities. However, data that could show the actual range of activities in this area (amounts and artists protected) is lacking. To a certain extent, programmes and recruitment for managers and producers, who will later internationally represent artists and the Polish music market, could also be deemed business-related. One

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[44] www.silesia.art.pl [retrieved on 15/08/2019]

[45] Report "Kondycja organizacji pozarządowych", Klon/Jawor Association - https://api.ngo.pl/media/get/108904 [retrieved on 01/09/2019]

should note the innovative nature of activities under Music Export Poland or the Hear the City: Incubator [Polish: *Tak Brzmi Miasto: Inkubator*] idea, which go beyond the scope of activities of most organisations.

Those whose activities most directly support the music industry and its representatives include: MEAKULTURA Foundation, Polish Music Foundation, Independent Polish Recording Foundation and the Association of Polish Music Artists. These organisations conduct diverse activities, thus providing support to the music market and musicians in various ways. A description of each of them is presented below.

The Independent Polish Recording Foundation [Polish: *Fundacja Niezależna Fonografia Polska*] is an entity whose purpose are activities in the cultural, information, consulting, organisation and intervention fields related to: the Polish music industry, collective and individual management of copyright and related rights, all aspects of exploitation and use of copyright and related rights, first and foremost associated with music and video/film use by businesses and natural persons, as well as the publishing, press, phonographic and video/film industries. On its website, the Foundation's representatives declare they provide help to entrepreneurs in solving problems related to the use of music and television, as well as in contacts with organisations such as ZAiKS, STOART, ZPAV, SAWP, Media Management Europe etc.[46] They can act as a source of knowledge and render consulting services for persons/companies that use music and television in their business.

The Association of Polish Music Artists [Polish: *Stowarzyszenie Polskich Artystów Muzyków*, SPAM] is one of the oldest organisations of its type (established in 1956). SPAM serves as a co-creator of what could be broadly described as the conditions for development of the musical life of our country, protects the artistic achievements of Polish musicians, as well as the profession of musician through activities aimed at improving the material and social situation of Polish musicians and maintaining the prestige they deserve, protects the rights to artistic performances, as well as other professional and community rights of musicians. It operates in the field of information, publishing, documentation (storing collections) and education. In addition, it represents the collective interests of its creators, awards grants and prizes (e.g. Orfeusz), awards, and material assistance.[47] The association has many branch offices and groups.

The **Polish Music Foundation** [Polish: *Polska Fundacja Muzyczna*, PFM] aims to help "people in the music community" who are in a difficult situation. PFM conducts aid campaigns for specific people who are in a difficult situation due to illness or fortuitous events. It acts as a patron for a publishing house and for events organised for "people in the music community" who need support. Funds for this are collected from 1% tax deductions paid to public benefit organisations [OPP], auctioning donated items, funds transferred by individuals and institutions. The Foundation has an Aid Fund, which can be used to provide aid to a musician/person professionally associated with the music industry in the event of an illness or accident preventing them from working in their profession, or a difficult life situation resulting in significant deterioration of their material situation. Pecuniary aid may be granted in the maximum amount of PLN 1,000, not more often than once over a 6-month period. The Foundation also conducts on-off collections, from which funds are transferred to specific artists in need. To raise money, PFM also

[46] http://fonosfera.pl/stowarzyszenie-rejestrowe/ [retrieved on 01/09/2019]

[47] http://spa-m.pl/o_stowarzyszeniu [retrieved on 01/09/2019]

conducted various campaigns, such as selling donation certificates, releasing CDs and singles, and publishing a calendar.[48]

The MEAKULTURA Foundation focuses on music, education and artists. Its goals are: promotion of valuable music of various genres, concert and publishing activities, implementation of educational projects, support for professional music journalism, as well as activities of scientists, creators, performing artists, producers and festivals (ones that stand out because of their high artistic quality). The foundation is formed by experts from the Polish academic and music communities, as well as from abroad (Belgium, United States, France, United Kingdom). The key projects implemented by MEAKULTURA are: publishing of the meakultura.pl magazine about music, the "KROPKA" Polish Music Critics contest, the "Save the Music" social-educational campaign, the "Music from Poland" portal, and publication of the book *Sto lat muzycznej emigracji. Kompozytorzy Polscy za granicą (1918-2018).* The foundation also organises lectures and workshops related to music, webinars, concerts, internships and apprenticeships for students and graduates, as well as book publishing[49].

The Polish Composers' Union [Polish: *Związek Kompozytorów Polskich*] unites composers and musicologists. Its statutory goal is to promote musical culture. The union does this by organising concerts, festivals, conferences, courses, exhibitions and contests, as well as through publishing activities. It runs a library (Library-Audio Library of the Polish Composer's Union – Documentary Centre of Polish Contemporary Music – "Warsaw Autumn" Festival Archive, currently operating under the name **Polish Music Information Centre** [*Polskie Centrum Informacji Muzycznej*]), where it collects and shares music collections and information on musical culture, contemporary Polish in particular. It is also active in protecting the copyrights and professional rights of composers and musicologists. In addition, it attempts to participate in global culture by establishing foreign contacts, exchanging information and participating in the activities of other international organisations. A key initiative of the Polish Composers' Union Management is the **"Warsaw Autumn" International Festival of Contemporary Music**, started in 1956 by Tadeusz Baird and Kazimierz Serocki.[50] The Polish Music Information Centre (Polmic) was founded in 2001 on the basis of Library-Audio Library of the Polish Composer's Union – Documentary Centre of Polish Contemporary Music, which collected books, scores and records, as well as information regarding contemporary Polish composers and their works for fifty years. The Polish Music Information Centre represents Poland in the International Association of Music Information Centres. Its activities include: collecting and sharing books, magazines and other publications covering contemporary Polish music. It owns the largest collection of scores by contemporary Polish composers in Poland. In addition, through the www.polmic.pl portal, it conducts activities aimed at providing information and promoting contemporary music. On the website, one can find reviews and a calendar of various music events. The organisation supports the music market through publishing, design and patronage.

Clusters, chambers and cooperative networks differ from individual associations and foundations. They allow several entities to join forces, gaining greater reach and influence. This is a relatively new initiative on the Polish market, one not always successful in surviving. The activities of several entities of this type were analysed: the Alliance of Independent Music Producers, the Polish Music, Music Export Poland, and Hear the City: Incubator.

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[48] http://polskafundacjamuzyczna.blogspot.com/ [retrieved on 01/09/2019]

[49] http://fundacjameakultura.pl/ [retrieved on 01/09/2019]

[50] http://www.zkp.org.pl/index.php/pl/ [retrieved on 01/09/2019]

The Alliance of Independent Music Producers [Polish: *Alians Niezależnych Producentów Muzycznych*] supports independent music producers in their development in Poland and abroad, promotes their cooperation and helps raise awareness of the music sector. In a way, this entity represents the collective interests of music producers. It aims to improve the position of Polish independent music (increasing its share on the radio, as well as exports), while ensuring professional representation and legal support.[51] The website features model contracts for download, as well as information about major events. The Alliance also organised the 2018 Independent Music Day industry conference.

The Polish Music Council [Polish: *Polska Rada Muzyczna*] is a forum working to build understanding, coordinating and undertaking joint actions for the benefit of Polish music culture. It represents 32 musical institutions and organisations domestically and abroad. These include philharmonics, national cultural institutions, universities, music institutes and publishers, creative associations, foundations and associations. Authorised to act for all participants, it has been established to formulate assessments, programmes and determine methods for achieving objectives that benefit national culture. It is a member of the International Music Council founded by UNESCO. The Polish Music Council's goals include developing music education, maintaining dialogue with state institutions and offices, issuing opinions on legal acts and conducting research.[52] It has a Foundation focused on implementing projects and a Team of Experts acting as an opinion-forming group and creating recommendations on key system-wide issues in universal music education.

Music Export Poland (MExP) is the export office for Polish music. It strives to achieve a radical increase in the export of our works, artists and recordings to foreign markets. This endeavour was taken up by ZAiKS and ZPAV thanks to the support of the Ministry of Culture and National Heritage. In addition, MExP disseminates information and recruits music industry representatives (vocalists, bands, managers, producers) for various types of foreign events (showcase festivals, meetings, workshops, camps) where Polish music could be promoted.[53]

The **"Hear the City: Incubator"** project [Polish: *Tak Brzmi Miasto: Inkubator*] is an innovative support instrument. This is the first free music industry support programme on the Polish market intended for self-managing artists and bands, as well as managers, which is held (2018-19) in Kraków, Katowice, Łódź, Poznań and Toruń. Its purpose is to provide them with knowledge, skills and contacts improving their presence on the music market. The aim is to learn about issues related to financial, legal, business, media, production and artistic aspects of a band's and a manager's work. A total of 150 people (30 in each of the five cities) participated in the Hear the City Academy programme, while 40 qualified for the Summer Camp (8 each in five cities)[54].

The last form of support is the **My Name Is New** project run by the Kayax recording studio for bands and solo artists starting out their careers and wishing to reach a wider audience. The programme's aim is to promote young artists.[55]

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[51] http://anpm.pl/ [retrieved on 01/09/2019]

[52] http://prm.art.pl/ [retrieved on 01/09/2019]

[53] http://www.musicexportpoland.org/ [retrieved on 01/09/2019]

[54] http://takbrzmimiasto.pl/inkubator/ [retrieved on 01/09/2019]

[55] https://mynameisnew.pl/ [retrieved on 01/09/2019]

ZAiKS is the oldest organisation of this type in Poland. It protects the works of its members, as well as those artists/authors who entrusted it with the protection of their works. Based on mutual representation contracts, it also manages the rights of foreign artists. ZAIKS brings together composers of classical, entertainment and dance music, playwrights, poets and writers, songwriters, screenwriters and directors, choreographers, publicists, as well as scientists, photographers, architects and visual artists. The association's three main areas of activity are: granting users permission for exploitation on behalf of the authors, collecting remuneration for the authors from users, distributing remuneration and transferring it to authors. ZAIKS supports creativity by organising competitions, awarding prizes and providing assistance, initiating and supporting various fields of creativity, creators, institutions, artistic initiatives, events and congresses by funding scholarships, grants and other financial assistance from the Creativity Support Fund [Polish: *Fundusz Popierania Twórczości*].[56]

Polish Society of the Phonographic Industry [Polish: *Związek Producentów Audio Video*; further: ZPAV] is an association of audio and video recording producers. ZPAV was established in 1991 to represent the interests of legal producers facing phonographic piracy, which reached a staggering 95% in the early 1990s. Today, it brings together almost 100 natural persons (representatives of the audio recording industry) and approximately 40 audio recording companies, which in terms of the value of sound recordings sold cover about 80% of the Polish music market.[57] Its main activities include signing contracts for broadcasting and public playback of sound recordings on behalf of producers, conducting information and education campaigns on copyrights, implementing a campaign to place hologram marks on audio media, maintaining rankings and awarding Gold, Platinum and Diamond certifications for record-breaking numbers of sold copies, organising and awarding the Fryderyk prize. ZPAV established the aforementioned Polish Music Foundation aimed at helping the music community.

STOART came about as an initiative of the Association of Polish Musicians, the Polish Jazz Association and the Association of Entertainment Musicians in Poland. Its activities include collective management and protection of entrusted rights to artistic performances of musical and verbal-musical works, as well as collection, distribution and payment of remuneration to performers. STOART is an active promoter of musical events, such as festivals, concerts, educational endeavours and record[58] publications. STOART runs a Promotional Fund, whose aim is to promote the artistic activities of its members and a Social Fund providing members with loans, grants and other forms of assistance.

The Association of Performing Artists of Music and Music with Lyrics [Polish: *Stowarzyszenie Artystów Wykonawców SAWP*; further: SAWP] unites performers: vocalists and instrumentalists. Like the organisations discussed above, its main goal is to protect performers' rights. Its task as an organisation protecting performers' rights is: collecting, dividing and paying out remuneration due to performers for the use of the effects of their work.[59]

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[56] https://www.zaiks.org.pl/ [retrieved on 01/09/2019]

[57] http://www.zpav.pl/onas/cotojestzpav.php [retrieved on 01/09/2019]

[58] http://stoart.org.pl/o-nas/o-stoart [retrieved on 01/09/2019]

[59] http://www.sawp.pl/site/o_sawp [retrieved on 01/09/2019]

6.2. Media activities

Media activities were analysed in the following areas: music television channels, radio stations, music magazines, music websites, music publishing, music journalists.

Culture, including music, is discussed (although increasingly less often and more modestly) in daily, socio-political, cultural and industry press. The intensity of this varies, but it needs to be emphasised that "culture" sections are disappearing from non-industry magazines, mainly daily newspapers. This is also connected with the falling number of journalists working on this subject and the changing basis of cooperation with magazines. Increasingly, writers covering culture have the status of collaborators (permanent or occasional).

Currently there are 40 music magazines on the Polish publishing market. They have different forms – paper and/or electronic. Due to the digitisation and transfer of content and journalistic activity to the online sphere, as has been discussed in the introduction to this chapter, these publications give their readers access to mobi, e-pub, and PDF versions in addition to a printed one, and often also act as a website.

Typological analysis has shown that magazines most often appear monthly (21) and quarterly (6). Upon an examination of the themes discussed in the magazines, it can be stated that most of them can be described as specialist magazines devoted primarily to musical and audiovisual equipment (10). Then there are periodicals on rock and metal (7), general music (7), club and electronic (2), reggae, jazz, alternative music, disco polo, hip hop, folk, blues (one each). An analysis of magazines shows that their circulation ranges from 1,000 to 35,000 copies, making most of them low-circulation magazines. None of them can be considered as a high-circulation magazine (more than 50,000 copies), while a few years back the situation was markedly different.[60] Music fashions, the recipients and how readers obtain information have all changed, which has significantly influenced the press and publishing market.

In analysing music journalism, it should be mentioned that it is rather difficult at the moment to clearly state who should be assigned music journalist status. In the case of regional newspapers, it was possible to identify only journalists who were assigned the entire cultural segment.

Furthermore, desk research, the method applied in this case, likewise does not allow in-depth analysis, which in the case of the discussed subject would be advisable in order to more clearly evaluate music journalism in Poland (e.g. content analysis). At the regional level, it was possible to reach 30 journalists writing about cultural events in their newspapers.

In the case of music journalists, the analysis contains a description of 73 persons whose achievements and activities may be considered recognised and respected within the community. They work in the radio, television and press. However, the analysis does not consider the nature of their achievements, as this exceeded the assumed method.

Key among them are music websites, of which 31 were identified for analysis. Therefore, the level of the websites varies greatly – from professional like Polmic to blogs run by individuals. Portals most often feature reviews of records, concerts, music events, provide reports from various events, post the latest information from the music world. Some of them maintain a calendar of events. They are operated by enthusiasts of a particular genre, with

[60] See Iwona Łydek, "Polska prasa muzyczna i jej dziennikarze," *Rocznik Prasoznawczy*. Year VI, pp. 149-69.

some having a group working as editorial personnel, while others operating as a blog. Some are run by various organisations and institutions (e.g. Legal Culture, NInA, IAM, Polmic, MEAKULTURA Foundation), others by private individuals.

6.3. Industry events and awards

This subject area divides analysis results into four parts: awards, competitions, conferences, fairs. Events aimed at supporting the music market in Poland can be divided into two categories: **artistic-scientific** and **industry-business**. The first includes competitions and conferences, as well as some awards. The second: trade fairs, individual conferences and other awards. A quantitative analysis has shown that the latter are definitely lacking on the Polish market. It seems that instruments of artistic rather than business support are definitely more numerous among the activities of all entities supporting the music market and artists. Artists have at their disposal various tools allowing them to develop their creative skills (awards, scholarships, competitions), but in the era of globalisation and competition, an artist needs to also be an entrepreneur. This aspect is rarely present in the curricula of artistic universities. Nor are training session, workshops or other forms of acquiring knowledge in entrepreneurship. One could therefore propose that such business and entrepreneurial activities (both in terms of knowledge and professional practice) should be included in the offer of public and industry entities.

Awards are a very broad category, as they are awarded by various entities, for various activities, from school level, through municipal, national and international, at various competitions, reviews, festivals, to artists (vocalists and instrumentalists), journalists, critics, as well as technical staff. It would be impossible to present their entire spectrum in this work, so focus was kept on nationwide awards with a well-established tradition and prestige within the community. The list does not include awards given as part of competitions and reviews. It should be noted here that the music awards market has shrunk significantly in recent years, which is due to wider changes in our country's cultural and music scenes. Currently, 23 recognised music awards are given in Poland. Awards in the music industry are now most often awarded by the media (12) and industry organisations (9). These include prizes for achievements, music activities, achievements over a year or a lifetime (e.g. *Fryderyki*, *Paszporty Polityki*, *Mateusz*), as well as for the performance of a piece during a particular festival (e.g. *Orfeusz*, *Karol Musioł Award*, *Karolinka*).

Table 51. Type of awarding entities

LN	Awarding entity	Number
1.	Media	12
2.	Industry organisation	9
3.	Institution	1
4.	Company	1
5.	Local government unit	1

Source: own work

Competitions were the second category subject to analysis. Like awards, this category demonstrates strong diversity in many respects. These are events organised for composers (of classical and popular music), instrumentalists, improvisers, bands, songwriters, authors of lyrics, etc. Often the music competitions serve to honour/commemorate a specific event. Music competitions are also used as part of educational activities (promoting musical culture) or seeking and supporting talented people. Sometimes, when combined with other fields of art, the aim is to generate artistic activities – installations, performance art and social events. The organisers are often schools, community centres, music institutions, industry organisations, non-governmental organisations, as well as music academies. Music competitions range from municipal to international in terms of scope. In this report, analysis has been limited to nationwide and international competitions, as they have the greatest support potential for the artists themselves and the music market, thanks to the high level of competition, media presence, recognition and prestige.

In total, 64 competitions were classified, including 37 international and 27 nationwide. The most famous of those analysed is the International Chopin Piano Competition, which is one of the oldest and most prestigious music competitions in the world. It is held once every five years. The inaugural edition took place in 1927, while the eighteenth will be held in 2020. Most of the competitions are addressed to instrumentalists (37), vocalists (10) and composers (8). There are seven mixed competitions dedicated to different performer categories and two for conductors.

Table 52. Categories of participants and competition organisers

	Categories	Number of competitions
Type of participants	Youth/young people/students/graduates	38
	Children/pupils	20
	Adults	13
	No age restrictions	3
Type of organiser	Non-governmental organisations	22
	Cultural institutions	18
	Music schools	12
	Music academies	10
	Other	2

Note: The sum of competitions in the table is not equal to the sum of the competitions indicated in the text, as some competitions are addressed to several of the selected categories.

Source: own work

Another type of competitions (contests) are those organised by large media stations, which are *talent shows* in nature. Undoubtedly, in addition to their purely entertainment role, they support the music market by creating new performers and acting as a promotional platform for artists who are already present in the recording industry, most often appearing as jurors in such programmes. The first such programme in Poland was *Szansa na sukces* (TVP) hosted by Wojciech Mann (1993-2012). Then came foreign formats, such as *Idol* (Polsat, 2002-2005; 2017), *X-Factor* (TVN, 2011-2013), *Mam talent [equivalent to "... has talent"]* (TVN, since 2008), *Must be the music. Tylko muzyka* (Polsat, 2011-2016), *The Voice of Poland* (TVP, since 2011). These programmes promoted such artists such Justyna Steczkowska, Katarzyna Stankiewicz, Monika Brodka, Krzysztof Zalewski, LemON, Enej, or Dawid Podsiadło.

The third analysed area was conferences. In this category, timeliness was taken as the key issue. This is because conferences are largely singular in nature, although there are also ones held cyclically. Therefore, the time window was the complete year 2018 and 2019 (conferences completed and planned). This allowed the number of conferences held annually and the current state to be determined. In the case of 2018 there were 24 identified conferences, and in 2019 – 19 (completed and planned). These are mostly scientific, musicological or interdisciplinary conferences in the humanities and social sciences. Only three industry conferences were found in 2018. The first was the *Music Export Conference.* Three editions have been held so far (2016, 2017, 2018). The conference's primary purpose is to impart knowledge and raise the competence level of Polish music industry representatives within the scope of the rules governing the global music market and music exports. The ultimate goal is to boost the Polish music sector on the international arena and, as a result, raise the value of Polish music exports. It also serves as a space for dialogue between the Ministry of Culture and National Heritage and the music sector, which allows the Ministry to tailor its activities and programmes according to the current challenges facing the music industry and its needs, and also to more accurately evaluate barriers to market development, in particular to music exports. The event was addressed, in particular, to music industry representatives, including managers, agents, promoters, publishers, distributors, release studios, music journalists, media houses and artists interested in improving their skills in music export. The previous conferences have led to initiatives supporting music exports, including such co-financed by the Ministry of Culture and National Heritage under the Minister's programme Creative Sector Development, i.e. *Music Export Poland*; *National Music Stage Network - Hear the City: Incubator*, the *My Name Is New* project and countless others. Also, many export projects have been established, i.e. the participation of music labels or agencies in the largest music trade shows in the world.[61] However, it was not possible to ascertain whether the conference cycle will be continued. The lack of events allowing exchange of experiences, information and establishing co-operation shows that there is a gap in the support provided. The second event was the 2018 Independent Music Day conference organised by the Alliance of Independent Music Producers and attended by label representatives, artists and their managers. The discussed topics included activities of independent artists and labels on the Polish music market – ranging from information on the latest legal acts regulating the music market or the possibilities of exporting music supported by the Ministry of Culture and National Heritage, to practical advice on unusual forms of promotion and sending songs to radio stations. The third industry event was the conference "Hear the City". In 2019, the Fryderyk Chopin Institute hosted the presentation of the European Agenda for Music. Industry conferences are a rarity considering the number of scientific conferences. It seems the area needs attention.

An analysis of events, such as trade fairs, leads to similar conclusions. Even though for many industries it is a popular form for meetings and presentations of new products and services, few such events take place in the music industry in Poland. According to available data there will be 6 trade fairs held in 2019. Interestingly, four of them have been scheduled for November this year. Four of them are on topics related to presentations of audiovisual equipment. The *Soundedit Festival* held in Łódź can be seen as a similar form of meeting – a festival of music producers, where workshops and lectures take place in addition to concerts. In previous years the *AES 138th Convention* (2015), *POL AUDIO - Musikalia* (2014), *Music Media* (2010) were held in Poland.

[61] http://sektorykreatywne.mkidn.gov.pl/pages/strona-glowna/wydarzenia/music-export-conference.php [retrieved on 20/08/2019]

7. Educational opportunities for the music industry

The inclusion of business topics in music education and other educational fields related to the music industry is a relatively new phenomenon. Nevertheless, there are a number of reasons why it is worthwhile to provide artists with business competencies (Sternal 2017, see Sarzyński 2014). Many aspects of the music market have changed in recent years,[62] and knowing how to manage your career in terms of not just its artistic, but also business aspects has become increasingly important. Teaching the basics of entrepreneurship and developing business skills should form part of broadly understood education provided to people who work or want to work in the music industry. Even the musicians themselves – including those in the making – are aware of the need for a more business-oriented approach (Polish Music Council 2016). At the same time, it should be noted that business competencies are to be understood as broadly as possible – as knowledge, skills and even personal features that are valuable for music market participants (Pluszyńska 2013).

There are three basic ways (educational paths) to acquire business competencies in the field of music: (1) through experience, in the course of professional practice;[63] (2) in the course of music education, as an element of arts education; (3) in the course of specialist arts and business education. The study presented below results from a comprehensive analysis of the nature, scope and methods of developing business skills within the education offer addressed to representatives of the Polish music scene.

Table 53. Areas of education included in the analysis – specific objectives of the study

Education path	Area of education	Specific objective of the study
Music education	Music schools	Describing to what extent and how music education in Poland facilitates the development of business competencies among musicians.
	Music universities	
Specialist arts and business education	Study majors	List of (1) study majors available within first- and second-cycle studies; (2) post-graduate studies; (3) other educational initiatives, including programmes, trainings, conferences as well as arts and business publications addressed to representatives of the music industry (or more broadly: the arts and culture industries) and developing their business competencies
	Post-graduate studies	
	Other elements of the education offer	

Source: Own work.

[62] This subject as well as music education and the music labour market have been discussed extensively in a number of noteworthy reports and studies, such as: Ilczuk, 2013 *Rynek pracy artystów i twórców w Polsce* [Labour market of artists and creators in Poland]; Jagodzińska 2013, *Szkolnictwo artystyczne i sytuacja artysty w Polsce* [Arts education and the situation of artists in Poland]; Kaczmarek, Posłuszna, 2018, *Marzenia a rzeczywistość – kariery współczesnych muzyków* [Dreams and reality – Careers of contemporary musicians]; Ministry of Culture and National Heritage (MKiDN) 2009, *Raport o stanie kultury w obszarze szkolnictwa artystycznego* [Report on culture in the field of arts education]; MKiDN 2013, *Rynek pracy artystów i twórców w Polsce* [Labour market of artists and creators in Poland]; MKiDN 2016, *Ogólnopolskie Badanie Losów Zawodowych Absolwentów Uczelni Artystycznych* [National survey of professional histories of arts university graduates]; Polish Music Council 2016, *Dynamika karier muzyków w obszarze całego środowiska muzycznego* [The dynamics of musicians' careers within the entire music environment]; Wagner 2005, *Career Coupling: Career Making in the Elite World of Musicians and Scientists*.

Music education, just like the entire Polish education system, is currently undergoing a thorough transformation at all three levels. Major ongoing changes include the winding-up of middle schools (Polish: *gimnazjum*), which led to changes in the core curriculum, the end of cohesion between music education and general education programmes, and changing the scope of fields of knowledge at the higher education level, which in turn resulted in changes in the model learning outcomes and the National Qualifications Framework for Higher Education. Nevertheless, both the previous and current core curriculum state that (primary and secondary) music school education and music studies should develop business competencies.

High school students, including those attending music schools, can build their business competencies during Introduction to Business classes offered as part of the general education curriculum, but it is difficult to define the practical dimension of said classes. According to the study presented below, the majority of tertiary music education programmes (82%) can be said to develop business competencies. Students can develop their business skillsets as part of programmes offered by 21 universities (out of 26 covered by the analysis). At the same time, it can be said that most (16 out of 18) music fields of study develop such competencies.

Nevertheless, business-oriented education in the course of music studies is often implemented in a superficial and inconsistent manner, simply in an attempt to meet formal requirements. As a result, it does not provide the knowledge and skills that would allow students to find their proper footing in the world of business. At the same time, however, it is clear that music universities are increasingly aware of the need to introduce business competence development in their educational offer, and there is a growing number of initiatives that support it.

The need to develop business competencies among music professionals is best answered by a specialist offer of arts and business education in the scope of study majors, post-graduate studies, and other, often non-academic, educational initiatives. Still, such initiatives are few and far between, and they are mostly addressed to a wider target group than just representatives of the music world.

There are 19 study majors that are particularly valuable to the music industry and offered as part of university programmes within 14 different fields of study. More than half (10) of the identified study majors are addressed to a wider group of potential students (artists and representatives of the culture industry), while 9 are addressed directly to representatives of the music industry. Study majors for musicians include: journalism and music business, music journalism, music in the media, music production, leading jazz and entertainment music ensembles, leading vocal and vocal-instrumental ensembles.

In addition, 29 post-graduate programmes offered within 20 different fields of study were identified during the analysis. These include 15 fields of study addressed broadly to artists and representatives of the culture industry, and five specifically to representatives of the music industry. Courses for musicians include: management academy for creators and artists, artist manager on the music market, music manager, music in the media, management for creators, artists and cultural organisers.

Most other educational initiatives take one of the following three forms: (1) educational programmes, trainings and courses, (2) academic and industry conferences and panels organised during various music industry events, (3) available sources of knowledge about the music business and culture management. This segment of the educational offer best meets the business needs of music professionals, because it is created by experts and practitioners in order to develop business awareness, entrepreneurship, management skills and competencies of musicians.

Research methodology

The study presented here was prepared on the basis of examining existing materials. Three basic types of documents were analysed. The first type consisted of legal acts defining the principles and scope of operation of schools in Poland, as well as the learning outcomes for various levels of music education.[64] The second type involved general information on specific elements of the education offer prepared by entities offering said education as well as external entities (e.g. rankings). The third type encompassed internal documents regulating the teaching process (e.g. education matrices, syllabuses, class schedules).

Data sources included websites describing the Polish education system and music market, information provided by educational institutions (e.g. school websites, education programmes and curricula, universities and faculties, virtual dean's offices), information available in university IT systems (*USOS* or similar) as well as materials and documents from the State Accreditation Committee's inspections of selected institutions. In the case of non-academic educational initiatives, the study took into account information provided by entities offering educational services (methods, content and learning outcomes), as well as other entities (participants, reviewers, publishers, speakers).

Table 54. Materials included in the analysis

General characteristics	Description of the educational institution	Learning outcomes	Content of education
• industry websites • school guides • information available on the following websites: - kierunki.net - opinieouczelniach.pl - otouczelnie.pl - podyplomowe.info - studia.gov.pl - studia.pl - studiapodyplomowe.net.pl	• description of the analysed educational institution • description of the educational initiative, including description of the process, methods, and education content • admissions guide • graduate profile and qualifications	• graduate profile and competencies • model learning outcomes and learning outcomes in the field of study • programme of studies • curriculum of the field of study • learning outcome matrices	• description of the content of education • list of subjects (including: class schedules, lesson plans) • course plans / course of studies • learning outcome matrices • course syllabuses (including learning outcomes)

Notes: It was not possible to include all of the above-mentioned types of documents for all fields of study.

Source: Own work.

[64] Given the ongoing slow introduction of changes arising out of the new act (Higher Education and Science Act), the analysed documents simultaneously contain materials from two different legal orders, with the majority being those that have not yet been adapted to the new requirements. A preliminary analysis of the research material revealed that the content relevant for the study was convergent in the amended documents. Nevertheless, additional homogenisation measures were required. Ultimately, the analysis of legal acts was based on the following documents: Higher Education and Science Act of 20 July 2018; Ordinance of the Minister of Culture and National Heritage of 26 May 2017 on the types of public and private art schools; Ordinance of the Minister of Culture and National Heritage of 9 April 2019 on the conditions and procedure for admitting students to public schools and arts education centres and transitioning from one type of school to another; Ordinance of the Minister of Culture and National Heritage of 6 June 2019 on curriculum frameworks in public schools and art education centres; Ordinance of the Minister of Culture and National Heritage of 14 August 2019 on core curricula for arts education professions in public art schools; Ordinance of the Minister of Science and Higher Education of 8 August 2011 on areas of knowledge, fields of science and art, and scientific and artistic disciplines; Ordinance of the Minister of Science and Higher Education of 2 November 2011 on National Qualifications Frameworks for Higher Education.

7.1. Music education

The music education system in Poland consists of three levels: primary music schools, secondary music schools and music universities. Polish music education has a long-standing tradition and is considered to be one of the model educational solutions (Białkowski 2011).

Primary and secondary music schools are divided into schools that provide both general and music education and schools that only provide music education. On the other hand, music universities offer first-, second- and third-cycle studies (previously: bachelor, master and doctoral studies respectively), as well as post-graduate studies and many other musical educational initiatives. However, the music education system is currently undergoing a thorough transformation, which significantly impedes the diagnosis of its condition.[65]

In accordance with the core curriculum, education in (primary and secondary) music schools and music universities should develop business competencies. One of the main tasks of this study was to determine the extent to which this goal is achieved.

Primary and secondary music schools

Generally speaking, Polish music schools, both at primary and secondary level, can be categorised in the following three ways: (1) into primary schools that teach basic knowledge about music – and their continuation in the form of secondary music schools; (2) into public and private schools, and (3) into schools that provide both general and music education and those that teach music only (Institute of Music and Dance 2013; Institute of Music and Dance 2014). The reform changed the duration of education in different educational establishments, the scope of the programmes and the age of students; general music schools were most affected.

Table 55. Primary and secondary music schools in Poland – after the reform

General primary music schools	General secondary music schools	Primary music schools	Secondary music schools
8-grade schools that run final primary school exams and final music exams, and provide both general and music education	6-grade schools that run final secondary school exams and final music exams, and provide both general and music education	6- or 4-grade schools, depending on the age of students, that run final music exams and provide music education	6- or 4-grade schools, depending on the study major, that run final music exams and provide music education

Source: Prepared on the basis of the Ordinance of the Minister of Culture and National Heritage of 26 May 2017 on the types of public and private art schools.

There are currently 540 educational establishments providing music education at the primary and secondary level, including 50 general primary music schools, 32 general secondary music schools, 467 primary music schools, and

65 On the one hand, some of the changes are a consequence of the education system reform which, as of the 2017/2018 school year, departed from the education model based on a 6-year elementary school, a 3-year middle school and a 3-year high school in favour of the system with an 8-year primary school and a 4-year high school. On the other hand, the changes are also rooted in the higher music education system (the need to expand the education offer and adapt it to market changes) and general prerequisites valid for the entire higher education system (in particular, changes in the Higher Education Act).

142 secondary music schools.[66] Music schools that focus solely on music education clearly outnumber general music schools that offer both general and music education.

In the course of education, music school students can develop their business competencies in two ways – as part of arts education and within the scope of general education at the secondary school level. According to the Polish education law, the scope and content of education are defined in the core curriculum. Although the core curricula of music schools are clearly focused on improving artistic skills, they also contain references to competencies and skills regarded as valuable in the business world.

Table 56. Business competencies developed in the education process – model learning outcomes for primary and secondary music schools

Primary music schools	Secondary music schools
After graduation, the student: • follows the principles of culture, ethics, and copyright law • works in a team under supervision of the person responsible for the implementation of the project, bears their share of responsibility for the effect of this work, integrates with the team and cooperates with its members • takes a proactive approach and can organise their individual work • uses information and communication technology	After graduation, the student: • follows the principles of culture, ethics, and copyright law, as well as other legal acts related to the protection of cultural goods • implements, individually and collectively, tasks and artistic projects in the field of their study major • works in a team on the assigned tasks, taking responsibility for the final effect of the teamwork, establishes contact and cooperates with musicians from the team (ensemble) • takes a proactive approach and can organise their own work • uses information and communication technology while performing artistic tasks to deepen their knowledge and improve their skills

Source: Ordinance of the Ministry of Culture and National Heritage of 14 August 2019 on core curricula for arts education professions in public art schools.

At the same time, every student of a secondary music school, just as any other student of a secondary school, has to complete an Introduction to Business course.[67]

Music universities (first- and second-cycle studies)

There are 194 music study programmes in Poland, including 108 first-cycle studies and 87 second-cycle studies. Voivodeships boasting the most comprehensive education offer (measured by the number of study programmes offered within music disciplines, not the number of available disciplines) are Łódzkie, Mazowieckie, Pomorskie, Śląskie and Wielkopolskie, while the least impressive offer can be found in Warmińsko-Mazurskie Voivodeship. The above-mentioned music education is offered by 26 higher education institutions, including nine music universities and 17 general universities.

[66] The values do not add up to 540, because 114 out of 540 music education establishments constitute school complexes with at least two different types of music schools.

[67] In the case of general secondary music schools, 1 hour a week in the 3rd grade, and 1 hour in the 4th grade; in the case of general secondary schools, 1 hour a week in the 1st and 2nd grade.

Table 57. First- and second-cycle music studies

Voivodeship	Name	Number of study programmes		
		First-cycle	Second-cycle	Total
Dolnośląskie	Karol Lipiński Academy of Music in Wrocław	8	8	16
Kujawsko-pomorskie	Feliks Nowowiejski Music Academy in Bydgoszcz Kazimierz Wielki University in Bydgoszcz	8	7	15
Lubelskie	Maria Curie-Skłodowska University in Lublin	3	1	4
Lubuskie	University of Zielona Góra	2	1	3
Łódzkie	University of Humanities and Economics in Łódź Grażyna and Kiejstut Bacewicz Academy of Music in Łódź	15	11	26
Małopolskie	Academy of Music in Kraków Pontifical University of John Paul II	8	8	16
Mazowieckie	Fryderyk Chopin University of Music in Warsaw	14	12	26
Opolskie	University of Applied Sciences in Nysa	1	-	1
Podkarpackie	State Vocational Academy in Sanok University of Rzeszów	4	1	5
Podlaskie	Białystok Branch of the Fryderyk Chopin University of Music in Warsaw	3	3	6
Pomorskie	Stanisław Moniuszko Academy of Music in Gdańsk Pomeranian Academy	18	8	26
Śląskie	Academy of Fine Arts in Katowice Karol Szymanowski Academy of Music in Katowice Karol Godula Upper Silesian Academy of Entrepreneurship in Chorzów Jan Długosz University in Częstochowa University of Silesia University of Warmia and Mazury	15	11	26
Świętokrzyskie	Jan Kochanowski University in Kielce	1	1	2
Warmińsko-mazurskie	University of Warmia and Mazury in Olsztyn	1	1	2
Wielkopolskie	Ignacy Jan Paderewski Academy of Music in Poznań Adam Mickiewicz University in Poznań Iwaszkiewicz Poznań School of Social Sciences	13	11	24
Zachodniopomorskie	Academy of Art in Szczecin	3	3	6
TOTAL		108	87	194

Source: Own work.

Music studies in Poland are offered in the form of 18 different fields of study in the case of first-cycle studies and 12 different fields in the case of second-cycle studies. Some of the most common fields of study include Art Education in the Field of Music and Instrumental Studies.

Table 58. First- and second-cycle music fields of study

Fields of study		
Name of the field of study	Number of study programmes	
	first-cycle studies	second-cycle studies
Art Therapy	1	0
Conducting	7	7
Art Education in the Field of Music	24	22
Instrumental Studies	21	20
Jazz and Stage Music	14	8
Jazz and Entertainment Music	1	0
Composition and Music Theory	7	7
Composition, Conducting and Music Theory	1	1
Musical and Choreography	2	2
Church Music	4	3
Music in the Media	1	1
Music in Multimedia	1	0
Music Therapy	1	0
Music Production and Sound Engineering	1	0
Sound Engineering	2	1
Dance	6	2
Artistic Therapy	1	0
Vocal Studies	13	12

Source: Own work.

The development of business competencies by music universities has been further analysed in three aspects: whether or not business competencies are listed in course descriptions, the business content of field-specific learning outcomes and the presence of business-related subjects in course plans. The presence or absence of business competencies in course descriptions, which are addressed primarily to potential and current students, may indicate whether or not this set of skills is considered important. Unfortunately, the relevant information is not available for over a quarter of the studies. In most other cases, the analysed content does not contain references to business aspects of the music industry or knowledge, skills and competencies considered to be important in the context of business.

Table 59. Business competencies in course description by study level

Level of study	Business competencies in course description			
	Yes	No	No data	TOTAL
first-cycle studies	28	52	28	108
second-cycle studies	26	37	23	86
TOTAL	54	89	51	196

Source: Own work.

Only 10 out of 26 universities included, mostly ancillary, information on the development of business competencies in the course of studies. Out of 18 music fields of study, 10 were characterised in a manner that referred to business competencies.

Table 60. Business competencies in course descriptions by university/field of study

University	%	No.
Academy of Music in Bydgoszcz	38%	13
Academy of Music in Łódź	75%	24
Academy of Music in Poznań	100%	18
Academy of Music in Gdańsk	7%	15
Karol Godula Upper Silesian Academy of Entrepreneurship in Chorzów	100%	1
Jan Długosz University in Częstochowa	100%	2
Adam Mickiewicz University in Poznań	100%	4
Maria Curie-Skłodowska University in Lublin	50%	4
University of Rzeszów	20%	2
University of Silesia	40%	5

Field of study	%	No.
Conducting	70%	10
Art Education in the Field of Music	38%	39
Instrumental Studies	40%	30
Jazz and Stage Music	31%	13
Composition and Music Theory	50%	10
Musical and Choreography	50%	4
Music in the Media	100%	2
Music Production and Sound Engineering	100%	1
Art Therapy	100%	1
Vocal Studies	29%	17

Note: The "No." column indicates the number of course descriptions included in the analysis. The "%" column indicates how many of them referred to business competencies. The tables only contain data on those universities and fields of study whose descriptions referred to business competencies.

Source: Own work.

Model field-specific learning outcomes for education in the field of art, and more specifically music, list the knowledge, skills and social competencies that are relevant for any musician operating within the sphere of business. These learning outcomes serve as the basis for defining model learning outcomes at the level of individual courses. Interestingly, the learning outcome related to financial, marketing and legal aspects of the music profession is the only one found solely in model learning outcomes for first-cycle studies, rather than studies at both levels.

Table 61. Business competencies developed in the course of studies – model learning outcomes for first- and second-cycle studies in the field of music

Model outcomes for music studies
• knowledge of financial, marketing and legal aspects of the music profession preparation for working in a team and leading a group • training in creating written works, oral presentations and public speaking • training in effective communication and living in society, in particular: teamwork in the scope of collaborative projects and activities, leading team activities, conducting negotiations and proper organisation of activities • awareness of industrial property protection and copyright and the need to manage intellectual property resources

Source: Prepared on the basis of the Ordinance of the Minister of Science and Higher Education of 2 November 2011 (item 1520) on the National Qualifications Framework for Higher Education.

Most of the analysed lists of field-specific learning outcomes contain references to business competencies. The outcomes do not differ depending on the level of study, region, university or field of study. This may be caused by the fact that the National Qualifications Framework for Higher Education is implemented with a close attention to the formal requirements. Only a small fraction of the analysed lists did not include all model learning outcomes.

Table 62. Business learning outcomes by study level

Level of study	Business-related learning outcomes			
	Yes	No	No data	TOTAL
first-cycle studies	67	3	38	108
second-cycle studies	55	2	29	86
TOTAL	122	5	67	194

Source: Own work.

In turn, the content of education reveals a lot about how universities implement their educational obligations resulting from field-specific learning outcomes. Business subjects were present in the course plans of both first- and second-cycle studies. Although more model learning outcomes with a stronger relationship to business were identified in the case of first-cycle studies, their course plans contained fewer business subjects than those of second-cycle studies. However, it cannot be precluded that these competencies were present in the content of education.

Table 63. Business subjects in course plans at various levels of study

Level of study	Business subjects			
	Yes	No	No data	TOTAL
first-cycle studies	55	41	12	108
second-cycle studies	54	26	6	86
TOTAL	109	67	18	194

Source: Own work.

Business subjects were included in the course plans of 17 universities in 14 different fields of study. There are some noticeable trends in terms of selecting educational content by individual universities (visible more strongly than in the case of fields of study), e.g. the Academy of Music in Łódź included business subjects in all analysed course plans, while only one third of plans offered by the Academy of Music in Gdańsk contained any business-related content.

Table 64. Business subjects in course plans by university/field of study

University	%	No.
Academy of Music in Bydgoszcz	77%	13
Academy of Music in Łódź	100%	24
Academy of Music in Poznań	47%	17
Academy of Music in Wrocław	44%	16
Academy of Music in Katowice	47%	15
Academy of Music in Gdańsk	29%	14
Academy of Music in Kraków	86%	14
Academy of Art in Szczecin	83%	6
University of Applied Sciences in Nysa	100%	1
Jan Długosz University in Częstochowa	100%	2
Adam Mickiewicz University in Poznań	50%	4
Kazimierz Wielki University in Bydgoszcz	50%	2
Maria Curie-Skłodowska University in Lublin	100%	4
Fryderyk Chopin University of Music in Warsaw	55%	31
Pontifical University of John Paul II	100%	2
University of Warmia and Mazury in Olsztyn	50%	2
University of Zielona Góra	100%	3

Field of study	%	No.
Conducting	79%	14
Art Education in the Field of Music	64%	40
Instrumental Studies	48%	40
Jazz and Stage Music	62%	21
Composition and Music Theory	86%	14
Composition, Conducting, and Music Theory	50%	2
Musical and Choreography	100%	4
Church Music	50%	6
Music in the Media	100%	2

Note: The "No." column indicates the number of plans included in the analysis. The "%" column indicates how many of them included business subjects. The tables only contain data on those universities and fields of study whose plans included business subjects.

Source: Own work.

Subjects developing business competencies offered as part of music-related fields of study can be divided into five blocs: marketing, promotion and cultural animation; copyright and intellectual property protection; management and finance; organisation of events and projects; communication and personal development. However, it should be noted that the identified business subjects are often university-wide (i.e. they are available to all students of the given faculty or university), meaning they offer general knowledge and have no specific musical focus. It is also difficult to assess the practical dimension of competencies acquired by students who attend them.

Table 65. Subjects developing business competencies

Marketing, promotion and cultural animation	Copyright and intellectual property protection
Cultural animation and organisation of art and educational projects Cultural animation Socio-cultural animation Marketing Marketing and promotion of cultural goods Cultural marketing and animation Marketing and protection of intellectual property Cultural marketing and PR Marketing and management in cultural institutions Cultural marketing Marketing of music events Electronic media in the service of music Introduction to marketing in music culture Promotion and marketing of cultural goods Promotion of culture Promotion in multimedia Promotion, marketing of cultural goods and event organisation Public relations and promotion of music activity Music promotion on social media Cultural management and marketing **Organisation of events and projects** Communication and organisation in a music project Social communication and organisation of events Organisation and management of concerts Work organisation and introduction to project management Organisation of music and media events Legal bases for organising mass events Copyright, organisation and management of concerts Artistic and educational projects Promotion, marketing of cultural properties and organisation of events Specificity of the organisation of musical events	Marketing and intellectual property protection Intellectual property protection Intellectual property protection – legal provisions Introduction to copyright law Copyright Copyright and scientific integrity Copyright, organisation and management of concerts Preparation of contracts **Management and finances** Music financing Cultural institutions and their operating principles Drawing up cost estimates Marketing and management in cultural institutions Modern team management methods Introduction to management and selected aspects of the musical profession Fundraising Management psychology of artistic ensembles Producer – artist, contact and cooperation Entrepreneurship in culture and art Music market – introduction Contemporary recorded music and audiovisual market in the context of digitisation and release of music resources Cultural management and marketing Cultural management Management in music culture **Communication and personal development** Communication and organisation in a music project Media communication – introduction Social communication Social communication and event organisation Designing and managing personal development Personal development training

Note: A subject may appear in several sections if it covers issues related to more than one topic.

Source: Own work.

To sum up, the majority of programmes (82% in total) of music studies (81% of first-cycle studies and 84% of second-cycle studies) helped students develop their business competencies.[68] The only voivodeship in which less than half of the studies covered by the analysis facilitated development of business competencies was Pomorskie, whereas in most voivodeships their share exceeded 90%.

Table 66. Studies developing business competencies by study level and voivodeship

Voivodeship	Studies developing business competencies								
	first-cycle studies			second-cycle studies			TOTAL		
	Yes	No	%*	Yes	No	%*	Yes	No	% *
Dolnośląskie	8	-	100%	7	1	88%	15	1	94%
Kujawsko-pomorskie	8	-	100%	3	4	43%	11	4	73%
Lubelskie	3	-	100%	1	-	100%	4	0	100%
Lubuskie	2	-	100%	1	-	100%	3	0	100%
Łódzkie	13	2	87%	11	-	100%	24	2	92%
Małopolskie	8	-	100%	8	-	100%	16	0	100%
Mazowieckie	14	-	100%	10	2	83%	24	2	92%
Opolskie	1	-	100%	-	-	-	1	0	100%
Podkarpackie	3	1	75%	1	-	100%	4	1	80%
Podlaskie	3		100%	3	-	100%	6	0	100%
Pomorskie	3	7	30%	4	4	50%	7	11	39%
Śląskie	8	7	53%	8	3	73%	16	10	62%
Świętokrzyskie	1	-	100%	1	-	100%	2	0	100%
Warmińsko-mazurskie	-	1	0%	1	-	100%	1	1	50%
Wielkopolskie	11	2	85%	11	-	100%	22	2	92%
Zachodniopomorskie	2	1	67%	3	-	100%	5	1	83%
TOTAL	88	20	81%	72	14	84%	160	34	82%

Note: % of fields of study developing business competencies

Source: Own work.

Currently, musicians can build their business competencies in the course of first- and second-cycle music studies offered by 21 universities. At the same time, these competencies are developed by the vast majority of courses offered by those universities.

[68] Individual study programmes were considered to develop business competencies if the institution offering said studies mentioned the possibility of developing business competencies in the course description, if business learning outcomes were listed among field-specific learning outcomes, or if a business subject was identified in the course plan.

Table 67. Universities offering courses that develop business competencies

University	Course developing business competencies		
	Yes	No	%*
Feliks Nowowiejski Music Academy in Bydgoszcz	10	3	77%
Grażyna and Kiejstut Bacewicz Academy of Music in Łódź	24	-	100%
Ignacy Jan Paderewski Academy of Music in Poznań	18	-	100%
Karol Lipiński Academy of Music in Wrocław	15	1	94%
Karol Szymanowski Academy of Music in Katowice	11	4	73%
Stanisław Moniuszko Academy of Music in Gdańsk	4	11	27%
Academy of Music in Kraków	14	-	100%
Pomeranian Academy in Słupsk	3	-	100%
Academy of Art in Szczecin	5	1	83%
Karol Godula Upper Silesian Academy of Entrepreneurship in Chorzów	1	-	100%
University of Applied Sciences in Nysa	1	-	100%
Jan Długosz University in Częstochowa	2	-	100%
Adam Mickiewicz University in Poznań	4	-	100%
Jan Kochanowski University in Kielce	2	-	100%
Kazimierz Wielki University in Bydgoszcz	1	1	50%
Maria Curie-Skłodowska University in Lublin	4	-	100%
Fryderyk Chopin University of Music in Warsaw	30	2	94%
Pontifical University of John Paul II in Kraków	2	-	100%
University of Rzeszów	4	-	100%
University of Warmia and Mazury in Olsztyn	1	1	50%
University of Silesia in Katowice	2	3	40%
University of Zielona Góra	3	-	100%

Note: % of study programmes developing business competencies out of all music courses offered by a given institution.

Source: Own work.

Most courses developing business competencies are conducted within two fields of study – Art Education in the Field of Music and Instrumental Studies. On the other hand, the lowest number of courses developing business competencies can be found within the following fields of study: Jazz and Entertainment Music, Composition, Conducting and Music Theory, Music Production and Sound Engineering as well as Artistic Therapy. Still, it ought to be noted here that these fields of study are also the least common in the overall education offer. In each case, at least half of the courses within individual fields of study developed students' business competencies. Art Therapy, Music in Multimedia and Music Therapy are fields of study that were not included in the table due to the lack of business competencies.

Table 68. Fields of study developing business competencies

Field of study	Courses developing business competencies		
	Yes	No	% *
Conducting	13	1	93%
Art Education in the Field of Music	36	10	78%
Instrumental Studies	34	7	83%
Jazz and Stage Music	17	5	77%
Jazz and Entertainment Music	1	-	100%
Composition and Music Theory	13	1	93%
Composition, Conducting and Music Theory	1	1	50%
Musical and Choreography	4	-	100%
Church Music	7	-	100%
Music in media	2	-	100%
Music Therapy – unique field of study	1	-	100%
Music Production and Sound Engineering	1	-	100%
Sound Engineering	3	-	100%
Dance	4	4	50%
Art Therapy	1	-	100%
Vocal Studies	22	3	88%

Note: % of study programmes developing business competencies out of all courses offered within the field of study.

Source: Own work.

A detailed analysis of course descriptions, course plans and educational content reveals that the development of business competencies in the course of tertiary music education is usually superficial. Rather than responding to the real needs of the music market and future musicians, university education is more focused on meeting formal requirements, and as such cannot be considered as sufficient preparation for conducting business activity in the music industry.

At the same time, it seems that universities are increasingly aware of the need to incorporate business competence development in their offer. For example, starting from the 2018/2019 academic year, the Fryderyk Chopin University of Music in Warsaw decided to modify its package of multimedia subjects offered to students – "Multimedia promotion for performers". The programme aims to prepare students to use modern audiovisual media and multimedia content distribution platforms for career-building purposes.

7.2. Specialist arts and business education

Teaching and developing business competencies and managerial skills among potential and current music professionals is not only an element of the music education system, but also the basis of a narrow segment of specialist education offer. It can be divided into three types: first- and second-cycle study majors; post-graduate studies; and other, most often non-academic, educational initiatives.

Not all initiatives discussed below were addressed exclusively to the music industry; many of them constituted part of the education offer addressed to a wider audience, e.g. artists or representatives of the world of culture. Nevertheless, they were included in the list, as their nature and content correspond to the potential needs of music market professionals.

Study majors within first- and second-cycle studies

Higher education institutions often maintain an internal division into study majors within their offered fields of study. The study identified 19 study majors that may be seen as valuable for music professionals, as they address issues from the field of music, culture and business. Five of them are part of first-cycle studies, six of second-cycle studies, and four are taught both as part of first- and second-cycle studies. Less than half (9) of selected study majors were addressed directly to representatives of the music industry. Most of them (6) were offered by music universities, while the remaining ones (3) were study majors within the field of Journalism and Social Communication.

Journalism and Music Business is a study major in the field of Journalism and Social Communication (second-cycle studies) offered by the University of Lower Silesia. Graduates will have acquired knowledge and skills concerning vital issues defining the contemporary approach to music, where music economics, non-standard methods of promotion and new media distribution are key. The study major provides knowledge concerning cultural institutions, the legal aspects of sound engineering, the responsibilities of a manager organising music events as well as the entire "groundwork" required to hold music and sound events.

Music Journalism is a study major in the field of Journalism and Social Communication (first-cycle studies) offered by the University of Lower Silesia. Students acquire journalistic competence and learn the rules of writing press articles and reviews. They also learn how to navigate the world of music and get to know the principles of organising concerts, festivals and music showcases, as well as recording and processing sound.

Music Journalism is a study major in the field of Journalism and Social Communication (first-cycle studies) offered by the University of Wrocław. It prepares students to work as journalists and commentators expressing their views on broadly understood music culture. Particular emphasis is placed on knowledge related to pop culture and music history, as well as on extensive competencies of a music journalist (speaking, writing, performing in front of a camera). The acquired skills make it easier to navigate the world of music business.

Music in the Media is a study major in the field of Music in the Media and Music Production (first- and second-cycle studies) offered by the Academy of Music in Łódź. It provides practical knowledge and skills related to music and media, supplemented with a serious reflection on cultural competence and knowledge about art. Graduates will have acquired an understanding of the financial, marketing and legal aspects of music-related professions as well as the operations of music institutions. They are also familiar with their legal and organisational foundations.

Music Production is a study major in the field of Music Production and Sound Engineering (first-cycle studies) offered by the Music Academy in Łódź. The course allows students to acquire extensive musical knowledge, an understanding of law, finance, management and psychology, as well as knowledge needed to prepare and produce art projects and to organise and manage various types of music events.

Leading Jazz and Entertainment Music Ensembles is a study major in the field of Jazz and Entertainment Music (first- and second-cycle studies) offered by the Music Academy in Bydgoszcz. The course is intended for musicians who want to develop their careers also in organisational terms. Graduates are taught, e.g., to organise and carry out all types of music performances in theatres, community centres, cultural institutions as well as during official and commemorative ceremonies.

Leading Vocal and Vocal-instrumental Ensembles is a study major in the field of Art Education in the Field of Music (second-cycle studies) offered by the Music Academy in Bydgoszcz. The course prepares students to organise and popularise a broad scope of music activities: from education, through organisation of musical ensemble work to performance of managerial functions in cultural institutions.

What is more, the analysis resulted in identifying ten other study majors that were addressed to a wider target group, but could be seen as equally valuable to music professionals. Among them were four first-cycle studies and six second-cycle studies. These study majors are most often taught in the fields of Cultural Studies (4) and Education Studies (2), and include:

- Creative Producer and Culture Manager; Cultural Studies (first-cycle studies); University of Humanities and Economics in Łódź;
- Manager of Arts Activities and Art Therapy; Education Studies (second-cycle studies); University of Lower Silesia;
- Manager of Social and Cultural Projects, Education Studies (second-cycle studies); Academy of Business and Health Sciences;
- Manager – Agent – Producer; Cultural Studies (second-cycle studies); SWPS University of Social Sciences and Humanities in Warsaw;
- Event Manager; Tourism and Recreation (second-cycle studies); WSB University in Wrocław;
- Management study major; Management of Art Institutions (second-cycle studies); University of Gdańsk;
- Talent Acquisition Manager; Human Resources and Coaching (first- and second-cycle studies); University of Lower Silesia;
- Culture Management, Cultural Studies (first- and second-cycle studies), Cardinal Stefan Wyszyński University in Warsaw.

Post-graduate studies

Post-graduate studies are considered as a highly specialised form of education. They are addressed to all tertiary education graduates. Post-graduate studies are perceived as a way to supplement and deepen one's knowledge. Some post-graduate fields of study addressed directly to music professionals or, more broadly, representatives of the cultural sector, address the need to strengthen the role of business education. 29 post-graduate studies implemented within 20 different fields of study are noteworthy in this context, 15 of which are addressed to artists and representatives of the world of culture, and only five directly to representatives of the music industry.[69]

Management Academy for Creators and Artists is a post-graduate programme offered by the Katowice School of Technology. The goal is to provide managers (creators, artists) with knowledge and skills in the field of VUCA (Volatility, Uncertainty, Complexity, Ambiguity). Graduates will have acquired such managerial competences as

[69] Management Academy for Creators and Artists and Management for Creators, Artists and Cultural Organisers are two courses included in the analysis of the offer addressed to musicians despite their broader target groups, because their education content matches the needs of the music industry.

dealing with difficult situations and conflicts, managing emotions at work, mitigating and resolving conflicts, learning from mistakes and implementing innovative solutions.

Artist Manager on the Music Market is a post-graduate programme offered by the Ateneum-University in Gdańsk. Its aim is to familiarise students with the economic, legal and psychological aspects of the work of an artist manager, and provide them with the social skills and competencies necessary to achieve success on the entertainment music market.

Music Manager is a post-graduate programme offered by the Fryderyk Chopin University of Music in Warsaw. The aim of these studies is to provide music graduates with knowledge on the principles of market economy. The educational content spans introduction to management, marketing tools, legal forms of business operations in the sphere of culture, sources of financing/revenue, assessment of the market situation, identification of potential cooperation partners and image management. Classes are taught by the Warsaw School of Economics staff and lecturers with hands-on experience from cultural institutions and creative sector companies.

Music in the Media is a post-graduate programme of studies offered by the MEAKULTURA Foundation and Collegium Civitas in Warsaw. The studies are addressed to anyone wanting to deepen their knowledge of music and its relations with the media, as well as improve their journalistic and music criticism skills. The course can expand the professional competencies of media workers, cultural managers and producers.

Management for Creators, Artists and Cultural Organisers is a post-graduate programme offered by the University of Warsaw. These managerial studies allow students to acquire knowledge, skills and qualifications necessary to manage cultural organisations and institutions; prepare them for starting their own business, create new jobs as well as gain art and business contacts.

It is worth noting that many business competencies that are valuable for the music market can be successfully developed through education offers addressed to a wider group of artists and people working in the field of culture. These include, e.g.:

- Cultural Management Academy: University of Ecology and Management in Warsaw;
- Cultural Organiser and Manager: School of Management Personnel in Konin;
- Vincent Pol University in Lublin;
- Creative Cultural Manager: University of Humanities and Economics in Łódź;
- Cultural Manager: University of Economics in Katowice; WSB Academy in Cieszyn; Poznań University of Economics; University of Economics in Katowice; Poznań School of Social Sciences;
- Manager in Cultural Institutions: University of Gdańsk;
- Professional Management of Cultural Institutions: University of Economics in Katowice;
- Post-graduate Studies for Cultural Managers: Warsaw School of Economics;
- Modern Art. Knowledge and Market: Collegium Civitas in Warsaw;
- Management of Cultural Institutions: WSB University in Gdańsk;
- Cultural Management: University of Economy (WSG); Centre of Postgraduate Education; Cardinal Stefan Wyszyński University in Warsaw; University of Łódź; Kotarbiński University of Information Technology and Management in Olsztyn;
- Culture and Media Management: Jagiellonian University;
- Management of Cultural Establishments: Wrocław University of Economics and Business;

- Management in Education and Cultural Institutions: University of Security in Poznań;
- Cultural Management: Gdańsk University of Technology;
- Management in Creative Industries: University of Economy (WSG).

7.3. Other education initiatives

The education offer provided by music schools and universities to representatives of the music industry is complemented by other education initiatives focused on developing business and managerial competencies. Due to their great variety and heterogeneous nature, as well as the considerable volatility of the course and trainings market over time, it was decided that the analysis will only include initiatives with a strictly music- and business-related focus and a continuous or repetitive nature.

The Academy of Music Managers is an educational programme whose main goal is to create and educate managerial staff to work with artists and bands and operate effectively on the music market. It is a well-respected educational initiative with many years of experience. The 15th edition of the Academy began in October 2019. The Academy's course plan includes 160 hours of classes taught during two-day sessions lasting altogether 10 months. It is organised by KnowBOX S.A. and held at Lazarski University in Warsaw.

Academy of Music Business was founded in early 2019 as an innovative School of Music Business. All courses available at the Academy of Music Business are semester-long, with one semester lasting 4.5 months. The most interesting courses include: Music Production & Music Industry, Music Business & Music Industry, Journalism & Music Industry, Music Management & Music Industry.

In 2019, the Warsaw School of Economics and the University of Warsaw organised the 13th edition of the Business and Music conference open to everyone interested in the music industry. The offer includes meetings with experts, lectures, discussions and workshops on issues in which business and music intersect.

Music Export Conference has been organised since 2016 by the Ministry of Culture and National Heritage and the National Centre for Culture Poland. The conference focuses on broadly understood music export and music business. Undoubtedly, it also plays an important educational role.

Bass & Beat Festival is an international music event offering a platform for conversations and exchange of experience, as well as a source of support for young artists and bands. Each edition of the festival offers workshops and meetings with music industry experts. In October 2019, the event also included a Music Business panel – a workshop dedicated to issues of music business conducted by experts.

International Festival of Music Producers and Sound Designers – Soundedit is a Łódź-based event for music producers with a ten-year history. The programme of the event includes concerts, workshops and meetings with musicians. For example, in 2017, representatives of the music industry taking part in the festival could attend talks about the multi-dimensionality of success (a series of meetings prepared jointly by the University of Łódź and the Soundedit Festival), as well as lectures on such topics as "Polish music exports – where are we and where can we be?" or "Music on the web – how to make money online?"

Spinlab DJ School is a stationary DJ school operating in Warsaw since 2013. Trainings organised by the school (individual meetings whose programme is adapted to student needs) also include discussing such issues as the DJ's cooperation with producers, music bands, or their self-promotion and market realities.

Music Career Management is a course offered by the Musicollective studio. The company, which at first provided only music education, decided to broaden its offer by adding a course designed for musicians, managers, producers and music promoters. The curriculum includes such topics as the principles of music business operations, market positioning, contract negotiations, image creation for bands/artists and cooperation with the media, as well as many other aspects of music career at every stage.

Management in Culture is the first peer-reviewed scientific journal in Poland that focuses on the issue of management within creative professions and industries, including music. Articles published in the journal concern new phenomena in the sphere of management of public and private cultural institutions, as well as independent and non-governmental projects. It is owned by the Jagiellonian University.

Furthermore, anyone interested in developing their business competencies related to working in the music industry can use the vast resources of such websites as, for example, promocjamuzyczna.com or biznesmuzyczny.com.pl.

Art Manager and Event Manager – planning, organisation and management of an event project are trainings organised by Event Manager Training Group, a company active on the market since 2009. The company offers education in conducting company meetings, promotional events and all kinds of events in the MICE industry (Meetings, Incentives, Conferences and Events). The trainings are organised cyclically.

The education offer also includes specialist online courses and trainings, which undergo numerous and relatively frequent changes. At present, the Art Manager course organised by MG Centrum Szkoleń i Konferencji, a training and conference centre, is best suited to the business needs of the current music market.

What is more, there are other noteworthy initiatives that lead to increasing business competencies among representatives of the music industry. It is worth mentioning at least some of them, for example, the educational value of initiatives run by Music Export Poland (MExP) or the "Tak Brzmi Miasto: Inkubator" project (Hear the City: Incubator). Because of their nature, they are discussed in the chapter on institutional support for the Polish music market.

Appendices

A1. Research methodology

The creation of this report would not be possible without prior establishment of the first database which contains information on the popularity of artists across many different music distribution channels. Most music services do not provide detailed data on the popularity of individual artists in Poland, or, for that matter, on the popularity of Polish artists abroad. The top artist charts are usually the only sources of such information. However, they are often compiled on a weekly basis and presented in different forms on the websites of individual music platforms.

Therefore, some of the results presented in the report are based on completely new databases created with the help of modern data collection techniques and online sources. The work began by identifying music sources and preparing a script used to create a database of information on artist popularity, which was later supplemented with data collected from other music services.

All tools used for the analysis were created using *R* software. The functions of *rvest* and *RSelenium* packages were used to navigate the websites, and *XPath* syntax was employed to display individual elements in the websites' code. Connection with the Spotify database was established using the *spotifyr* package – a wrapper for API functions of the service (in this case, it is a package for managing API functions from the level of *R* software). During the data collection process, every due effort was made to avoid excessive and unwanted overloading of the websites and services from which data was sourced.

1. Rankings – automated data collection

The Polish music charts of individual music services were the main source of collected data. Due to their diverse character, many of them required personalised web scraping tools. First of all, a list of potential music rankings was identified, as presented in Table 1. The identified channels also included Deezer and Shazam, but as these services do not publish country-specific charts, they were not included in the analysis and, consequently, in the report.

Channel	Data source	Frequency of publication	Number of charts in 2018	Number of all recorded instances*
Shopping centres	ZPAV	Quarterly	1**	100
Night clubs	ZPAV	Weekly	35	14,450
iTunes	Archive versions of the website with the iTunes charts (kworb)	Daily	42	12,200
Plus Music	Plus Music playlists	Weekly	47	1,987
CDs	OLiS	Weekly	50	46,750
Vinyl	OLiS	Weekly	47	2,880
Radio	ZPAV airplay charts	Weekly	52	21,391
Spotify	Spotify playlists	Weekly	53	28,200
Tidal	Tidal playlists	Weekly	1	100
TV	ZPAV airplay charts	Weekly	52	2,375
YouTube – Artists	YouTube	Weekly	35	5,700
YouTube – Videos	YouTube	Weekly	35	5,700
YouTube – Songs	YouTube	Weekly	35	5,700

** Number of all recorded instances includes all chart positions in all rankings for all available years. In the case of streaming services with annual charts, only 2018 data was taken into account.*
*** refers to the third quarter of 2014.*

Next, a new method of measuring popularity was developed for the report to ensure that the 2018 data could be analysed in a uniform manner, regardless of the source. The method was based on allocating points to artists for individual chart placements – regardless of their frequency. First, the number of positions in the chart was checked for each channel. Then, the first position in each chart was allocated the number of points equal to the number of the lowest chart position. Each subsequent place in the ranking was worth 1 point less than the previous one, and the lowest-ranking artist in the chart received only 1 point.

For instance, in 2018, the CD sales charts were published weekly and included 100 items. Each week, 100 points were allocated to the artist who came top of the list, with the artist who came second receiving 99 points, the third-ranking artist 98 points, and so on. The artist at the bottom of the chart received just 1 point.

Afterwards, all points assigned to all artists who charted in 2018 were summed up for each artist separately. The total number of points became the basis for the annual artist chart for 2018. Some of the channels included in the analysis provided data which required additional aggregation or transformation before it could be used to create the final chart. The differences in approaching individual channels are defined below in the relevant channel descriptions.

a. Shopping centres

URL address:

http://ozz.zpav.pl/muzykawbiznesie/toplistyprzebojow.php?idtypu=9&show=archives#year=2014

Data on the music played in shopping centres is available on the ZPAV website, but it covers only some of the quarters of 2010, 2013 and 2014. The ranking included in the report is based on information from the third quarter of 2014, i.e. the latest available data, and names the 20 most popular songs. Because it is the only chart from that year, the data has not been aggregated with any charts from other periods.

b. Night clubs

URL address:

http://ozz.zpav.pl/muzykawbiznesie/toplistyprzebojow.php?idtypu=11&show=archives#year=2018

Data on the music played in night clubs is presented on the ZPAV website. The available information concerns the 2010-18 period, but it was not until around 2014 when the frequency of publication became mostly weekly (mostly, as some charts cover longer periods). There were 35 rankings published in 2018, each of them representing a top 50 song chart.

c. iTunes

URL address: https://web.archive.org/web/*/https://kworb.net/charts/itunes/pl.html

iTunes provided information on the most frequently purchased tracks, but only for the previous day, which is why information from other services was taken into account to determine the popularity of various artists throughout the year. The first source of additional data was kworb.net, a website reporting current charts from various music services. Unfortunately, kworb.net does not include archive chart versions and, just as iTunes, publishes only the most recent version of the charts. The issue was solved by using the Wayback Machine, which provides access to saved archive versions of other sites. The automated data collection process was applied to all archive versions of the iTunes charts published on kworb.net in 2018, i.e. 42 daily charts from a 10-month period. Each chart constituted a list of 200 most frequently purchased songs.

As representation of individual periods of the year was not heterogeneous, before the annual chart could be created, the data had to be modified through aggregation. First, the points for each artist were calculated for each day. Then, the data was aggregated into months by calculating the average number of points from the days for which the charts were available for each artist. Finally, the data was further aggregated to create the new annual chart by adding all the obtained averages.

d. Plus Music

URL address: https://plusmusic.pl/playlist/2307 (first of the playlists; URL addresses of other playlists were obtained by changing the last 4 digits in the URL).

In 2018, Plus Music (formerly Muzodajnia) began to present weekly top song charts (with only a few weeks missing). Not all individual weekly charts are accessible via the site's search engine, but they can be located by manually modifying the URL addresses of other playlists. In total, 47 weekly charts listing 26-30 most popular songs were collected for the analysis for 2018.

e. CDs and vinyl

URL address: http://olis.onyx.pl/listy/archiwum.asp?lang=pl

URL address: http://bestsellery.zpav.pl/olis/winyltygodniowy/archiwum.php

Data on the best-selling records is provided by OLiS. Information on CD sales has been regularly published since 2000, while the sales charts for vinyl were first introduced in 2017. The OLiS charts are weekly rankings of 50 best-selling CDs and 30 best-selling vinyls. 50 CD sales charts and 47 vinyl sales charts were published in 2018.

ZPAV also publishes monthly and annual sales rankings. It has to be emphasised that the aggregation method applied to create the annual chart for this report provides slightly different results. The discrepancy stems from the fact that the method used for the report is based on allocating the same number of points to the same chart positions every week, regardless of the number of records sold in a given period. Meanwhile, annual ZPAV charts may be affected by large sales recorded over relatively short periods, which makes them susceptible to seasonal trends. For example, if we assume that record sales increase around December, any records released in this period may be more likely to appear on a sales-based annual chart.

Thus, the approach adopted for this report has two significant advantages over the use of official annual and monthly charts. First of all, the approach is based on assigning the same weight to every week and month of the year, which means that the created chart better reflects the overall popularity of artists throughout the year. Secondly, the approach allows to include a much greater number of artists. The ZPAV monthly charts are limited to the top 10 artists (which means 120 artists per year, with repeats, including "Various Artists"). In contrast, the method used in this report broadens the analysis to include chart positions of 335 artists (in the case of CD sales), which in turn allows to create more specific charts for such artist subgroups as Polish artists or Polish artists popular abroad.

f. Radio

URL address: http://bestsellery.zpav.pl/airplays/top/archiwum.php

Data concerning songs which are most-frequently broadcast on the radio was taken from the ZPAV website. The weekly airplay charts have been published there since 2010. In the early years, the charts only contained five items. In 2018, they include data on the top 100 songs for all 52 weeks.

g. Spotify

URL address: https://spotifycharts.com/regional

Data on the most popular songs streamed on Spotify in Poland was taken from the service's official weekly charts, which presented the top 200 artists (for 53 weeks representing, at least in part, 2018). What is more, the charts for all other available countries were also downloaded from Spotify to check if they include any Polish artists.

h. Tidal

URL address: https://listen.tidal.com/playlist/fac272c9-82c4-40b0-b30c-2515fe36dddb

Tidal data was obtained from its Tidal Top 100 Songs Poland playlist for 2018, which included 100 tracks. Tidal also publishes charts covering shorter periods, but they are either not available for the entire length of the year (e.g. 8 out of 12 months) or are not defined in a manner that is clear enough to allow for assessing their usefulness (e.g. the playlist "Week 1: Best Songs" and its subsequent versions with higher week numbers contain no date and no indication if the "best songs" mean the most-streamed tracks or the ones which are most often marked as favourite by users).

i. TV

URL address: http://bestsellery.zpav.pl/airplays/pozostale/archiwum.php?typ=tv

Data concerning songs that are most-frequently broadcast on TV was obtained from the ZPAV website, where the weekly airplay charts have been published since 2010. They present the top 5 songs for every week (52 weeks per year).

j. YouTube (artists, videos, songs)

URL addresses: https://charts.youtube.com/charts/TopVideos/pl?hl=pl;
https://charts.youtube.com/charts/TopArtists/pl?hl=pl; https://charts.youtube.com/charts/TopSongs/pl?hl=pl

Data on YouTube popularity was obtained from the site's own charts, presented separately for artists, videos and songs (songs do not have to be presented as music videos; they can also be published on YouTube in several different versions). Since the last week of April of 2018, the charts have been updated weekly. There are therefore 35 YouTube charts available for 2018.

The three types of YouTube charts are not independent from one another. The popularity of a music video affects not only the chart position of the video itself, but also the position of the artist and the song. Therefore, the majority of analyses in the report refer to the summary “YouTube” category, which most often constitutes the average of the three above-mentioned YouTube charts.

2. Combining artist information

Several transformations were required in order to standardise artists’ names. The goal was to make it easier to combine artist information from different charts (e.g. if the artist names differed slightly between weeks or sources), remove information that did not constitute part of the name (e.g. additional information about the role, provided in brackets), minimise issues related to spelling differences and various punctuation marks, and facilitate the search for artists who are listed on the charts in combination with other artists. The process of simplifying artist names involved several steps, and a new search was performed in Spotify for every artist at every step of the process. It means that the first search was based on relatively unchanged artist names, while the last search was conducted for the names that had been reduced to the most important characters.

a. The process began by standardising the artist name format, which involved removing punctuation marks and special characters (e.g. , ; - _ + ( ) ` ‘®), articles (“a”, “an”, “the”), and conjunctions that have more than one form (e.g. “and”, “&”, “i”). Diacritical marks were also removed, and the affected letters were replaced with their more universal forms (e.g. “ą” was replaced with “a”, “ö” with “o”). Additional spaces were deleted as well (e.g. spaces inserted at the beginning or end of the name, or double spaces in the middle).
   All these operations helped standardise artist names and facilitated both data combination and search processes (no artist identifying keywords were removed).
b. Next, information on featured artists was removed from the artist name section, leaving only data concerning the main artist. This was done by removing all strings of characters beginning with such phrases as “featuring”, “feat.”, “ft.” and similar, from the artist names.
   This allowed for narrowing the search results to the main artist only and eliminated the confusion caused by different ways of indicating featured artists.
c. The third step concerned songs performed by two artists – only data on the first of the named artists was retained. All strings of characters following such stand-alone elements as “and”, “&”, “i”, “oraz”, “vs”, “with”, “x” or “/” were removed.
d. The fourth step involved removal of all characters appearing after such characters as “(”, “<”, “[” or “{”, which eliminated all information which could potentially refer to the song’s position rather than the artist’s name.

Applying the above-described procedure allowed to successfully combine the Spotify data with information from other sources for most artists. Table 2 presents the percentage of artists with identified Spotify IDs in individual channels.

3. Additional artist information

Access to the Spotify data allowed for the automated retrieval of additional information concerning artists.

a. Spotify API contains information about music genres assigned to individual artists. The genres were narrowed down to a few most popular ones, although some of the presented charts contain more aggregated data. As a rule, an artist was associated with a given genre if the name of that genre appeared among the terms used in the genres provided by Spotify API. In several cases, other related genres have also been added to the main groups. Table 3 contains a list of the selected genre groups and information on genre assignment criteria.

Genre	Allocation criterion
Pop	Spotify API genres containing the word “pop”
Hip hop	Spotify API genres containing the word “hip hop” or “rap”
Disco polo	Spotify API genres containing the word “disco polo” or “Polish disco”
Rock	Spotify API genres containing the word “rock”
Poetry	Spotify API genres containing the word “poetry”
Metal	Spotify API genres containing the word “metal”
Reggae	Spotify API genres containing the word “reggae”
Classical	Spotify API genres containing the word “classical”
Blues and jazz	Spotify API genres containing the words “blues”, “jazz”, “soul” or “r&b”
Electro	Spotify API genres containing the words “electro”, “house”, “techno” or “trance”
Film music	The artist is presented as “Film Music” in the chart
Compilations	The artist is presented as “Various Artists” in the chart
Other	If an artist was found in Spotify API, but none of the aforementioned music genres was assigned to said artist

b. The following methods were used to identify Polish artists: First of all, all artists whose names or song titles contained Polish characters such as “ą” or “ń” were classified as Polish artists. Secondly, all artists whose stage names included Polish first names (or Polish spellings of names) such as “Wojciech”, “Piotrek”, “Janusz” or Polish endings of surnames such as “-owski”, “-ewski” or “-owska” were classified as Polish. Thirdly, all artists linked to music genres which Spotify identifies as “Polish” (e.g. Polish folk, Polish rock, Polish jazz) or assigned to the “disco polo” genre were also classified as Polish. In addition, five cities with the largest number of listeners were checked for each artist, and if at least one of the top 5 cities was located in Poland, the artist was classified as Polish.
This approach enabled the authors to correctly identify most Polish artists in the sample.

c. Information about five cities with the largest number of listeners was also used to identify those Polish artists who have gained popularity outside their home country.

d. Finally, the gender breakdown of top artists was also identified for the rankings presented in section 2. This was achieved by analysing the most recent composition of every band and calculating the percentage of women. In the case of artists who perform under their own names and surnames, the gender was assigned on the basis of their actual names.

4. Record sales

URL address: http://bestsellery.zpav.pl/wyroznienia/zloteplyty/cd/archiwum.php;
http://bestsellery.zpav.pl/wyroznienia/platynoweplyty/cd/archiwum.php;
http://bestsellery.zpav.pl/wyroznienia/diamentoweplyty/cd/archiwum.php

The ZPAV website provides information on the awarded gold, platinum and diamond record certifications. The artists who received such awards were identified for the rankings and assigned additional information, as described in item 3. In total, 4,382 certifications have been awarded so far, 329 of them in 2018. What is more, the number of CDs sold was also estimated for each artist for the charts on the basis of the regulations for awarding the certifications presented on the ZPAV website (http://bestsellery.zpav.pl/wyroznienia/regulamin.php). The music genres and nationalities verified in accordance with the procedure described in item 3 were used for the report to ensure that the number of records sold was estimated correctly.

5. Concerts

URL address: https://www.koncertomania.pl/

Additional data on the concerts listed on the Koncertomania website was collected to analyse the concert market. In total, 23,427 concerts were held in Poland in 2018. The data was combined with artist information from Spotify. The number of concerts for each artist was calculated for the chart.

6. Radio

URL address: https://odsluchane.eu

Data from Odsluchane.EU site was collected in order to better analyse radio airplays. The site compiles information from 74 channels, including 18 nationwide radio stations, 50 local radio stations, 3 TV channels and 3 online radio stations. In total, data was collected for 11,235,324 plays in 2018. The songs were then located in Spotify (just over 300,000 unique artist-song connections were identified) and combined with information from Spotify API. This procedure provided additional information on about 85% of plays in 2018. Classical music constituted a significant part of the remaining 15%.

7. Polish artists popular abroad

URL address: https://www.last.fm/tag/polish/artists

Data on all artists tagged as "Polish" in Last.fm were collected in order to identify Polish artists who are popular abroad, but do not appear in the rankings. The Last.fm website contains information on how often individual songs have been streamed by its users around the world. Artists with the highest number of Last.fm listeners were verified in terms of: the language used in the songs, the language used in their social media channels and the nationality of people commenting on their Last.fm profiles. This approach allowed to identify popular artists whose target audience is not Polish.

A2. Additional tables

Selected Polish artists on social media in 2018

Artist	YouTube*	Facebook	Instagram	Twitter	Spotify**	Deezer
Ania Dąbrowska	173,300	128,534	21,895	-	235,561	401
Bedoes	1,691,589[D]	155,933	390,701	-	755,204	2,393
BLACHA	1,313,592[C]	41,122	139,599	-	377,020	726
Brave	25,688	12,450	8,202	-	38,603	787
C-bool	376,032	137,617	30,588	-	358,246	6,361
Dawid Podsiadło	430,702	430,642	274,502	25,137	916,215	2,801
Gromee	164,587	44,015	38,569	1,057	605,904	1,705
Guzior	1,746,847[A]	96,488	114,769	-	409,610	3,974
Kali	22,379	653,382	360,472	2,461	300,070	104
Komodo	154,159	44,189	7,503	139	351,369	348
Kortez	250,736	157,720	73,895	-	331,883	5,567
Margaret	551,850	594,921	880,578	8,558	459,776	12,748
Paluch	1,386,477[B]	518,294	407,442	732	470,916	7,929
Paweł Domagała	355,243	166,906	105,966	737	261,737	458
Quebonafide	1,746,847[A]	420,469	687,077	-	732,850	19,263
ReTo	1,313,592[C]	185,425	398,506	-	384,138	5,224
Sarius	297,341	85,939	139,940	-	449,625	2,597
Sławomir	789,650	135,040	131,188	177	127,007	1,717
Smolasty	411,694	37,002	224,041	-	522,522	1,049
Szpaku	1,386,477[B]	102,569	255,572	-	462,819	2,143
Taco Hemingway	1,272,183	317,813	394,803	1,661	1,058,300	18,238

** Number of subscriptions*
*** Number of listeners per month*
A – subscriptions of the QueQuality channel
B – subscriptions of the BOR Crew channel
C – subscriptions of the NewBadLabel channel
D – subscriptions of the SBM Label channel
Data as at 6 August 2019

Source: own work

Number of concerts in Poland by voivodeship (in thousands)

Voivodeship	2016	2017	2018
Dolnośląskie	4.8	4.9	4.1
Kujawsko-pomorskie	3.0	3.3	2.6
Lubelskie	2.8	2.7	1.9
Lubuskie	1.5	1.5	1.3
Łódzkie	3.8	3.7	2.2
Małopolskie	9.4	9.1	7.6
Mazowieckie	17.3	20.0	10.5
Opolskie	0.9	0.9	1.1
Podkarpackie	1.5	1.9	1.5
Podlaskie	1.6	1.8	1.2
Pomorskie	6.3	6.7	5.2
Śląskie	6.4	6.5	4.9
Świętokrzyskie	1.5	1.5	1.1
Warmińsko-mazurskie	2.5	2.3	1.7
Wielkopolskie	5.1	6.0	4.9
Zachodniopomorskie	2.8	2.8	2.4
TOTAL	71.0	75.6	54.2

Note: The TOTAL value does not add up to the total number of all events and concerts, because in some cases there was no clear indication of their location.

Source: Own work based on concert market data provided by Coigdzie.pl® – event database and repertoire.

Number of concerts in Poland by voivodeship

	Mass-scale concerts			Music festivals		
	2016	2017	2018	2016	2017	2018
Dolnośląskie	126	161	192	12	11	9
Kujawsko-pomorskie	91	106	114	3	3	3
Lubelskie	66	98	81	3	3	3
Lubuskie	33	48	47	3	2	2
Łódzkie	61	73	97	3	3	4
Małopolskie	187	186	187	7	7	7
Mazowieckie	179	260	272	10	9	9
Opolskie	31	41	55	3	2	2
Podkarpackie	41	66	75	3	3	3
Podlaskie	43	75	69	10	9	8
Pomorskie	96	122	141	1	1	1
Śląskie	157	172	225	15	15	14
Świętokrzyskie	20	69	67	1	1	1
Warmińsko-mazurskie	101	98	105	6	6	7
Wielkopolskie	208	256	289	7	6	6
Zachodniopomorskie	102	93	103	3	3	4

Source: Own work

Number of concerts in Poland by voivodeship

	Philharmonics, orchestras and choirs			Classical music concerts		
	2016	2017	2018	2016	2017	2018
Dolnośląskie	4	4	4	369	372	347
Kujawsko-pomorskie	2	2	2	340	353	382
Lubelskie	2	2	2	116	111	117
Lubuskie	2	2	2	179	263	251
Łódzkie	1	1	1	365	390	314
Małopolskie	4	4	4	1,389	1,433	1,554
Mazowieckie	6	6	6	2,081	3,222	2,275
Opolskie	1	1	1	68	78	104
Podkarpackie	1	1	1	9	77	84
Podlaskie	1	1	1	79	61	59
Pomorskie	5	5	5	483	765	850
Śląskie	5	5	8	553	583	87
Świętokrzyskie	1	1	1	90	115	84
Warmińsko-mazurskie	2	2	2	164	177	187
Wielkopolskie	3	5	4	309	336	135
Zachodniopomorskie	2	2	2	256	415	411

Top YouTube Songs

#TOP	Artist	Title	Views (million)	Genre	Country
1	Paweł Domagala	Weź Nie Pytaj	63.7	Pop	PL
2	ReTo	Ua	38.5	Hip hop	PL
3	Maroon 5	Girls Like You	35.3	Pop	UK
4	Feduk	Розовое вино	35.2	Hip hop	RU
5	Margaret	Byle Jak	33.8	Pop	PL
6	Armin van Buuren	Blah Blah Blah	33.8	Pop	NL
7	BLACHA	Mademoiselle	33.2	Hip hop	PL
8	TACONAFIDE	Tamagotchi	32.0	Hip hop	PL
9	Sarius	Wiking	28.9	Hip hop	PL
10	ReTo	Sorry Dolores	28.5	Hip hop	PL
11	Clean Bandit	Solo	27.4	Pop	UK
12	C-Bool	Wonderland	25.8	Pop	PL
13	BLACHA	Casablanca	25.7	Hip hop	PL
14	TACONAFIDE	Kryptowaluty	24.6	Hip hop	PL
15	GAZIROVKA	Black	24.3	Pop	PL
16	Smolasty	Fake Love	23.3	Hip hop	PL
17	White 2115	California	23.2	Hip hop	PL
18	Miły Pan	Królowa	23.0	Disco polo	PL
19	Allj	Розовое вино	21.6	Pop	PL
20	Young Igi	Bestia	21.1	Hip hop	PL
21	Dawid Podsiadło	Nie Ma Fal	19.0	Pop	PL
22	Ariana Grande	No Tears Left To Cry	18.9	Pop	USA
23	BLACHA	Braciszku	18.8	Hip hop	PL
24	Defis	Ralle	18.7	Disco polo	PL
25	5 Seconds of Summer	Youngblood	18.7	Pop	AU

Note: the music genres were assigned based on Spotify data

Source: own work based on collected data

The most popular videos in Poland on YouTube in 2018

#TOP	Artist	Title	Views (million)	Genre	Country
1	Zeamsone	San Andreas	157.3	Hip hop	PL
2	Allij & Feduk	Розовое вино	55.6	Pop	RU
3	ReTo	Ua	43.8	Hip hop	PL
4	BLACHA	Mademoiselle	34.9	Hip hop	PL
5	Maroon 5	Girls Like You	32.4	Pop	UK
6	Sarius	Wiking	28.9	Hip hop	PL
7	ReTo	Sorry Dolores	28.5	Hip hop	PL
8	Clean Bandit	Solo	27.6	Pop	UK
9	BLACHA	Casablanca	27.4	Hip hop	PL
10	Margaret	Byle Jak	27.2	Pop	PL
11	White 2115	California	26.5	Hip hop	PL
12	TOP GIRLS	Jakbyś Mnie Zechciał	25.2	Disco polo	PL
13	TACONAFIDE	Kryptowaluty	24.6	Hip hop	PL
14	Smolasty	Fake Love	22.1	Hip hop	PL
15	Dawid Podsiadło	Małomiasteczkowy	21.8	Pop	PL
16	Komodo	(I Just) Died In Your Arms	21.4	Pop	PL
17	K-391 & Alan Walker	Ignite	20.9	Pop	NO
18	ReTo	RS7	19.3	Hip hop	PL
19	Defis	Ralle	19.1	Disco polo	PL
20	BLACHA	Braciszku	18.8	Hip hop	PL
21	Szpaku	Ufo	18.7	Hip hop	PL
22	BLR x Rave & Crave	Taj	18.1	Pop	UK
23	Ariana Grande	No Tears Left To Cry	17.8	Pop	USA
24	GUZIOR	Ninja	17.8	Hip hop	PL
25	White 2115	Nowi Kumple	16.2	Hip hop	PL

Note: the music genres were assigned based on Spotify data

Source: own work based on collected data

Cultural centres, community centres, clubs, youth clubs and varia – concerts and concert-goers (in thousands)

Voivodeship	2018		2017		2016	
	Concerts	Concert-goers	Concerts	Concert-goers	Concerts	Concert-goers
Dolnośląskie	2.7	943.7	2.8	1,009.0	2.8	977.9
Kujawsko-pomorskie	1.6	541.4	1.7	529.8	1.7	494.2
Lubelskie	1.9	584.0	1.6	552.9	1.8	838.2
Lubuskie	1.1	306.6	1.2	327.5	1.2	510.4
Łódzkie	1.6	506.7	1.7	518.9	1.8	524.1
Małopolskie	3.8	1,840.9	3.6	1,307.2	4.2	1,395.6
Mazowieckie	4.1	1,017.4	4.5	1,114.1	4.9	1,383.3
Opolskie	0.8	207.5	0.8	184.2	0.8	190.1
Podkarpackie	2.0	779.4	2.2	783.6	2.2	850.5
Podlaskie	1.2	407.8	1.3	447.2	1.4	504.4
Pomorskie	1.5	498.1	1.5	560.6	1.5	518.8
Śląskie	4.1	1,478.2	4.4	1,620.5	4.3	1,858.0
Świętokrzyskie	1.1	389.3	1.1	401.7	1.1	428.7
Warmińsko-mazurskie	1.4	637.4	1.5	572.1	1.6	669.4
Wielkopolskie	3.2	1,176.2	3.4	1,182.7	3.5	1,232.9
Zachodniopomorskie	1.6	587.0	1.7	733.5	1.7	590.4

Philharmonics, orchestras and choirs – concerts and concert-goers (in thousands)

Voivodeship	2018		2017		2016	
	Concerts	Concert-goers	Concerts	Concert-goers	Concerts	Concert-goers
Dolnośląskie	3.2	457.9	2.9	468.5	2.8	427.9
Kujawsko-pomorskie	2.0	352.7	2.0	363.6	2.0	344.2
Lubelskie	0.2	101.7	0.3	111.7	0.2	72.7
Lubuskie	5.2	421.3	5.0	410.0	4.7	462.1
Łódzkie	0.2	106.6	0.1	56.9	0.1	51.4
Małopolskie	1.0	262.6	1.1	303.8	1.0	1,242.9
Mazowieckie	3.3	736.2	3.0	696.9	3.0	711.7
Opolskie	0.2	69.1	0.2	63.4	0.1	44.3
Podkarpackie	1.0	94.5	1.0	79.6	1.0	82.6
Podlaskie	0.2	19.4	0.2	17.7	0.2	19.0
Pomorskie	0.6	303.3	0.4	433.6	0.6	539.3
Śląskie	3.3	708.8	3.3	660.9	3.7	641.2
Świętokrzyskie	1.1	166.0	0.9	139.6	0.8	134.3
Warmińsko-mazurskie	1.0	152.2	1.1	203.0	1.0	153.7
Wielkopolskie	1.7	275.6	1.7	212.7	1.4	203.3
Zachodniopomorskie	0.5	174.4	0.5	167.0	0.4	161.6

Note: Data aggregated in voivodeships based on the concert location

Regional Authorities [DO] of ZAiKS:

Regional Authority Łódź-Silesia, inspectorates: Bielsko Biała, Częstochowa, Dąbrowa Górnicza, Katowice, Łódź [city], Łódź area, Piotrków Trybunalski, Rybnik, Sieradz, Skierniewice, Zabrze; Regional Authority Świętokrzyskie-Lublin, inspectorates: Biała Podlaska, Chełm, Janów Lubelski, Kielce [city], Kielce area, Lublin [city], Lublin area, Radom, Tarnobrzeg, Włodawa, Zamość; Regional Authority Kraków, inspectorates: Cracow city, Cracow area, Krosno, Nowy Sącz, Rzeszów, Tarnów; Regional Authority Greater Poland-Kujawy, inspectorates: Bydgoszcz, Kalisz, Konin, Leszno, Piła, Poznań [city], Poznań area, Toruń, Włocławek; Regional Authority Sopot, inspectorates: Elbląg, Gdańsk area, Giżycko, Olsztyn, Słupsk, Sopot; Regional Authority Szczecin, inspectorates: Gorzów Wlkp., Koszalin, Szczecin [city], Szczecin area, Zielona Góra; Regional Authority Warsaw, inspectorate: Warsaw; Regional Authority Wrocław, inspectorates: Jelenia Góra, Legnica, Opole, Wałbrzych, Wrocław [city], Wrocław area; Regional Authority Mazovia-Podlasie, inspectorates: Białystok [city], Białystok area, Ciechanów, Łomża, Ostrołęka, Płock, Siedlce, Warsaw area.

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