



IRELAND: MUSIC REPORT 2025

THE CULTURAL AND ECONOMIC VALUE OF MUSIC

Prepared by Core Research for IMRO

June 2025

Introduction

Ireland's music industry is a vibrant and culturally significant sector that reflects the nation's rich Celtic history, deep musical heritage, and modern artistic innovation. Known for its traditional Irish music as well as its contributions to contemporary genres, Ireland has a unique position in the international music scene, with many Irish artists packing out theatres and stadia worldwide. This research report provides a comprehensive analysis of the Irish Music Industry including its composition, economic impact, and cultural significance. It paints a picture of a nation deeply connected to music but facing substantial challenges in nurturing its music industry.



Traditional Irish music remains a cornerstone of Ireland's cultural identity, celebrated year-round through many festivals and gatherings. Results from our research show that Ireland's music scene extends far beyond its folk roots, highlighting a thriving and diverse landscape with contemporary acts like Lankum and emerging talent like Amble, Jazzy, NewDad, and many more making their mark on the global stage.

Ireland's music industry is a vital contributor to the national economy, generating €1 billion annually and employing over 13,400 people. It supports thousands of jobs in performance, production, and event management. Dublin, Cork, and Galway are key hubs for music production and live performances, with venues ranging from intimate pubs to large arenas like the 3Arena. In 2024, the research showed that the average adult spends almost €1,000 on music-related products/services. Irish consumers spend a significant amount of money (€375m) on streaming services.

Streaming services and digital platforms play a crucial role in the Irish music market. Spotify, Apple Music, and YouTube are widely used, allowing Irish artists to reach global audiences. Concerns arise, however, around the income generated among artists who already consider themselves struggling to meet day-to-day financial expenses.

The research allowed us the opportunity to speak to several respected authorities within their field, and these individuals provided us with some comparisons and differences they have noticed across Europe and further afield. Sweden is recognised as a country that has enjoyed a revival of its music exports partly due to government-backed music education and initiatives that foster creativity. While Ireland's focus has been on live performances and traditional music, Sweden's emphasis on production and songwriting highlights a different pathway to success in the global music industry¹.

¹ <https://sweden.se/culture/arts-design/the-swedish-music-miracle>

Key voices in the industry also referred to the emergence of South Korea's K-pop industry, which demonstrated the power of cultural branding and government intervention. K-pop's global success is underpinned by systematic training programs, high-budget productions, and strategic marketing. On the other hand, Ireland's music industry, while successful in cultivating grassroots and independent talent, is seen to lack the level of state intervention and global marketing machinery seen in other competitor territories. It was widely noted from all



strands of our research that government support for the Irish music industry, with close input and collaboration from music industry stakeholders, will be critical to its success going forward.

The industry, while vibrant, faces many challenges, including limited funding for emerging artists, the high cost of touring, and competition from larger markets. Brexit has also introduced complexities for Irish artists performing in the UK, one of their largest markets, including access, additional paperwork, and carnet administration costs. The advent of AI has created perhaps the single biggest challenge for legislators in a generation. Achieving a delicate balance between encouraging innovation whilst nurturing human artistic endeavour will be key to the future success of Ireland's creative economy.

Opportunities lie in leveraging digital platforms to reach global audiences, fostering collaborations with international artists, and increasing investment in music education and infrastructure. Additionally, promoting uniquely Irish music and associated genres could help expand the industry's reach.

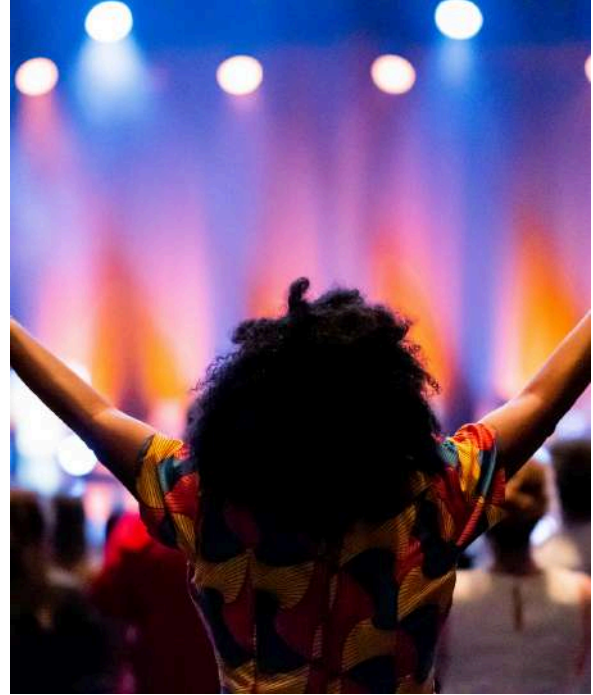
The findings suggest that the music industry in Ireland is a dynamic, culturally profound, and influential sector that significantly impacts beyond its scale on the world stage. While it faces competition from larger markets, its unique fusion of traditional and contemporary sounds gives it a distinctive voice. By drawing insights from other countries and addressing current challenges, Ireland has the potential to further solidify its position in the international music landscape.

Eleanor McEvoy

Chairperson of IMRO

Executive Summary

Ireland's music industry is a vibrant and integral part of the country's cultural identity and an economic driver, blending its rich traditional roots with a dynamic contemporary music scene. Known for its iconic contributions to global music, from traditional Irish melodies to modern artists, Ireland exceeds its size and influence on the international stage. This report delves into the industry's current state, challenges, opportunities and prospects, offering a comprehensive look at one of Ireland's most significant cultural sectors with specific recommendations to allow the industry to reach its full potential.



Cultural Significance: Music holds a deeply rooted place in Irish culture, with 71% of adults highlighting its importance in their lives. Public interest in music surpasses other activities such as sports and politics. While nearly two-thirds of the population listen to music daily, younger generations engage more actively, driven by digital platforms that cater to their moods and preferences. The industry faces an opportunity to transform this interest into active support for artists and live performances.

Economic Impact: The music industry contributes close to €1 billion annually to Ireland's economy, directly employing over 13,400 people. Live events dominate consumer spending, generating €786 million annually, reflecting the popularity of large-scale concerts and festivals. However, the economic structure remains inequitable for creators, with many earning below the national average. The reliance on additional income from non-music jobs underscores the financial challenges within the industry.

Streaming platforms such as Spotify have revolutionised music access and discovery. However, the uneven sharing of income in streaming - where artists and songwriters receive a disproportionately low share of the revenues - further complicates the landscape, with many artists struggling to earn sustainable incomes despite widespread distribution.

Genres and Artists: Ireland's music scene blends traditional and modern influences, showcasing the diversity of its artistic output. Emerging genres such as Irish-language hip-hop, R&B, and electronic music signal a shift toward greater diversity and experimentation. Younger audiences gravitate toward these newer genres, while older generations maintain a strong connection to rock and singer-songwriter styles.

Radio continues to play an essential role in promoting music, especially local artists, offering a sense of regional identity. However, digital platforms exert a greater influence on music discovery, with algorithms driving exposure to new music. This shift presents both opportunities and challenges, particularly for independent artists seeking visibility in a crowded digital marketplace.

Comparative Insights:

Insights from other countries provide valuable lessons for Ireland's music industry. Sweden's robust government-backed music education and support systems have positioned it as a global leader in music production and songwriting. South Korea's K-pop phenomenon highlights the potential of strategic branding, high-budget productions, and government intervention. In contrast, Ireland's focus on live performances and grassroots talent has been successful but lacks the structural support needed to compete globally.



Challenges: The industry faces several pressing challenges -

1. **Impact of AI:** Advancements in AI and generative AI music pose an existential risk to the role and value of human creativity. Legislators must find a balance between innovative tech development and human creativity so that Ireland's unique cultural contribution is strengthened and not abandoned for short-term external profit motives.
2. **Financial Inequity:** Many artists earn below-sustainable incomes, often requiring additional jobs to make ends meet, with income levels fluctuating precariously from one year to the next.
3. **Underinvestment:** Compared to sectors like the Audiovisual sector, music enterprises receive limited Government funding and strategic support, especially for developing the business infrastructure essential to its growth.
4. **Brexit Impacts:** The UK's departure from the EU has complicated access to one of Ireland's largest markets.

Opportunities: Despite these challenges, the industry holds immense potential -

1. **Digital Platforms:** Leveraging global reach through platforms like Spotify and YouTube can amplify Irish artists' visibility.
2. **Diverse Genres:** Promoting underrepresented genres could broaden the industry's appeal.
3. **Cultural Branding:** Building on Ireland's cultural heritage could position the industry as a global leader in musical creativity.
4. **Government Support:** Strategic policies developed in collaboration with the music industry, funding, and education initiatives could provide the structural support needed to sustain the industry, a sector that has the potential to become significantly more vibrant and dynamic.



To ensure the long-term viability of Ireland’s music industry, collaborative efforts between the government, private sector, and artists are essential. Key priorities include:

1	Implementation of EU AI Act to protect and nurture human creativity.
2	Increased funding for emerging artists and grassroots initiatives.
3	Development of equitable revenue models to address the "value gap" ² .
4	Structural support for music businesses, including publishers, labels, management companies, and other industry stakeholders, to strengthen the infrastructure that sustains the music ecosystem.
5	Investment in music education to cultivate future talent.
6	Strategic global marketing campaigns to position Irish music on the world stage.

In conclusion, Ireland’s music industry is a dynamic and culturally rich sector with significant global potential. By addressing its current challenges and drawing inspiration from successful international models, Ireland can ensure its unique musical legacy continues to thrive in a rapidly changing global landscape.

² *The Value Gap refers to the funnelling of value away from creators into the hands of a small number of global online platforms.*

Artificial Intelligence (AI)

Artificial intelligence (AI) is both a tool and a challenge for Ireland's music industry. Generative AI - capable of producing music, images, and text - offers the possibility of creating new artificial works and the potential to assist human creativity, innovation, production, and marketing. It also raises serious challenges for the future of human creativity. Artists, songwriters, and composers are at the forefront of this new paradigm. AI is undeniably shaping this new landscape. A recent CISAC - commissioned study³ estimates AI-generated music alone could reach €16 billion annually on a global level by 2028, with AI-driven audiovisual content generating a staggering €48 billion. Yet, this growth comes at a cost. Under current conditions, up to 24% of music creators' revenues are at risk by 2028, amounting to a cumulative loss of €10 billion over the next five years and an annual shortfall of €4 billion by 2028.



The key issue currently is that AI platforms are using existing music without obtaining permission from the copyright owner. The AI platforms are leveraging creative works to generate new outputs without sharing the revenue generated with the original creators. Such a practice undermines the industry's fundamental principle, which is that the use of copyrighted material requires permission, a license for use and fair remuneration to the copyright owner. Unfortunately, this is not happening in the AI space where existing music is being incorporated into AI training sets with no permission, no regulated marketplace, unlicensed uses, and without any fair compensation for the owners of original music compositions.

Many IMRO members are open to a collaborative approach, recognising that technological innovations can enhance their creative processes. Technology companies and platforms possess the systems and expertise to fully understand existing copyright laws, practices and principles. Retrospective corrective actions are already required by the technology companies to provide full transparency regarding the creative data already scraped, copied, and used. Collective Management Organisations (CMOs), such as IMRO, must work with Governments, regulators, and their members to establish a fair licensing system where permissions can be sought and granted for the use of copyright works. While this is undoubtedly an issue that impacts members of IMRO, it is important to state that this is not just an EU issue. A global response is necessary to ensure a consistent and uniform approach is in place. This will eliminate any rogue territories seeking a competitive advantage.

³ CISAC Report Ref: [Global economic study shows human creators' future at risk from generative AI | CISAC](#)

Artificial Intelligence (AI) - What does it all mean?



Recommendations:



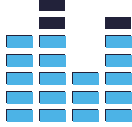

How can Ireland effectively address the challenges and opportunities presented by AI?

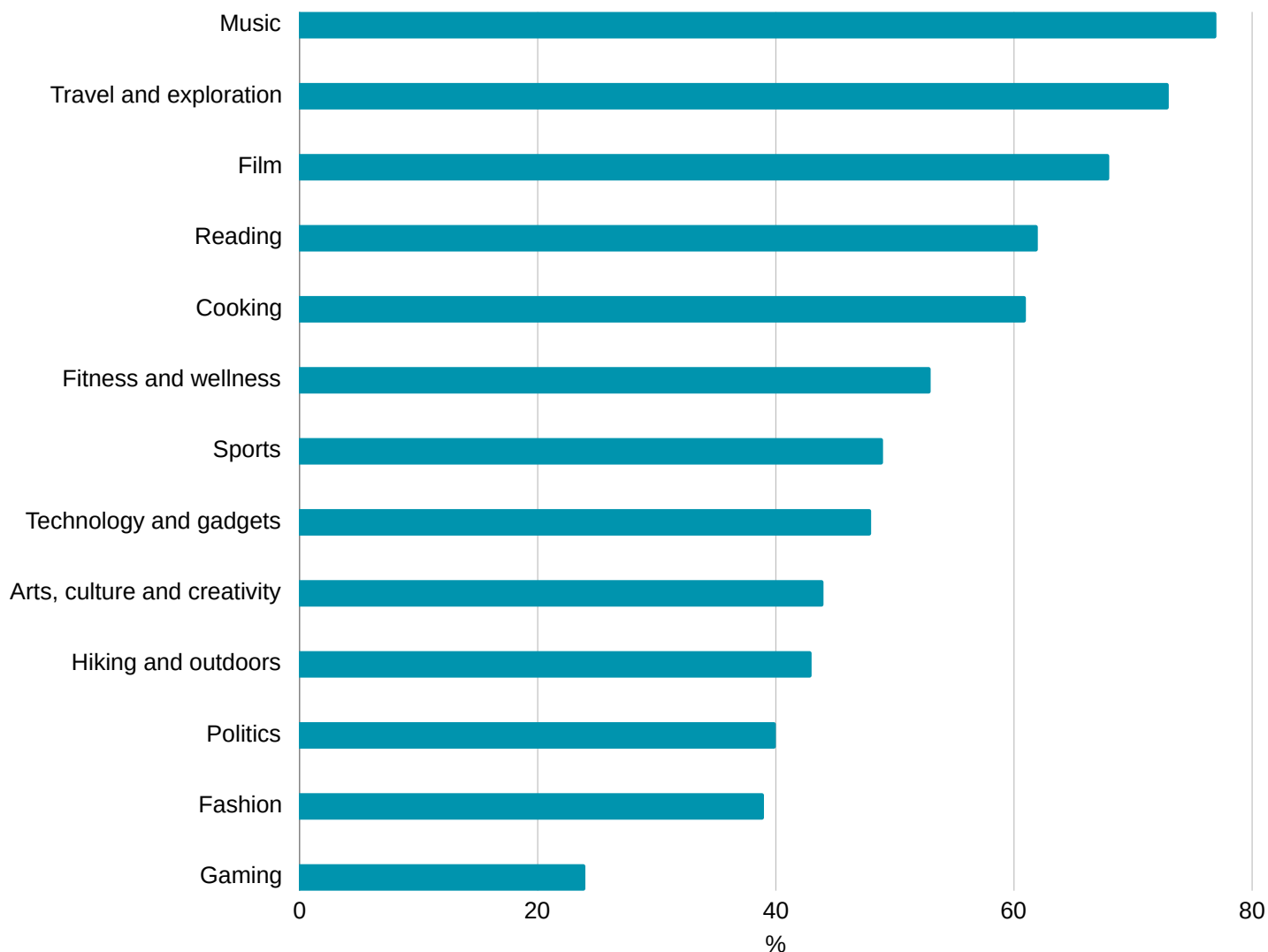
1	Advocate for fair AI legislation and regulations to protect the music industry: Fully implement the EU AI Act and ensure platforms conform to their transparency obligations and that a regulated market is maintained for the licensing of existing copyright works.
2	Protecting Performers' Rights: Digital cloning of an artist's voice or likeness without consent is a serious threat. IMRO supports introducing new personality rights legislation in Ireland, inspired by protections in the SAG-AFTRA 2023 Agreement ⁴ , ensuring creators retain control over their own identities.
3	Economic Support for Creators: IMRO agrees with the AI Council's recent recommendation ⁵ concerning the provision of financial incentives, delivery of AI literacy programmes, and establishment of innovation hubs to help creators adopt and effectively use AI tools. This fosters creativity, collaboration, and global competitiveness in the creative sector. Notably, institutions like Berklee College of Music (US) and Abbey Road Studios (UK) already offer AI-focused music courses, highlighting the growing importance of AI education in the industry.
4	Preserve human artistry while exploring AI's potential: use to enhance creativity rather than replace it.

In conclusion, we recommend the development of a comprehensive Creative AI strategy to protect the rights and livelihoods of those working in the Irish music and cultural industries while ensuring that AI is used ethically and transparently.

A structured AI strategy would also help Irish artists harness AI's potential as a creative tool without undermining originality, cultural heritage, or traditional Irish music. By proactively shaping AI regulations, the various parties involved could help Ireland become a leader in responsible AI innovation, ensuring that technology supports, rather than replaces, human creativity.

Public Interest & Engagement

			
<p>Music has the highest public interest.</p> <p>77% of all adults have an interest in music compared to 49% for sports.</p>	<p>One-quarter of adults are high listening Music Fans.</p> <p>27% of all adults listen to over two hours every day, on average 3 hours & 14 minutes.</p>	<p>71% of adults say “Music is an important part of my life”</p> <p>84% of <i>Music Fans</i> (high listeners) agree with this statement.</p>	<p><i>Music Fans</i> are more likely to use social and digital media to follow music.</p> <p>39% of <i>Music Fans</i> follow music artists on social media compared to 26% of all adults.</p>



The report emphasises music's central role in Irish culture, with 77% of respondents expressing an interest in music, surpassing other popular activities such as travel, film, reading and sport. Despite significant media coverage, only half (49%) have an interest in "Sports," and 40% have an interest in "Politics."

Nearly half (48%) of the population report being "very interested" in music, equating to approximately 1.94 million people representing a sizeable proportion of the population engaged with music. Despite significant interest, the report reveals that many listeners are unaware of its profound role in their daily lives.

The average adult listens to 84 minutes of music daily, though younger adults (18–34) engage more, averaging 92 minutes. Listening patterns vary significantly, with two-thirds of the population listening daily and a dedicated segment of "Music Fans" averaging over three hours (194 minutes) per day. These fans tend to be younger, predominantly female, and belong to lower socio-economic groups. In contrast, "Low Listeners," comprising 43% of the population, average only 26 minutes daily, are predominantly older, and often work full-time or are retired.

Listening to music daily is a habit for two in three people (65%), with a further 22% saying they actively listen "a few times a week." 88% of Music Fans listen daily, compared to 41% of the Low Listener group. Interestingly, when we look at Music Fans, they span two generations (18-55), are also interested in film, cooking, and fashion, and there is no major geographical skew, suggesting that music fandom is across the length and breadth of Ireland.

Two in three people (64%) say they tend to listen to artists habitually rather than discover new acts, while 48% of people have "rediscovered iconic songs or albums" recently, and 46% have discovered a new artist or song from watching a TV show or movie.

Across all adults living in Ireland:

- 71% agree that "music is an important part of my life", while this proportion increases to 84% of Music Fans;
- More specifically, 43% of all adults strongly agree with the statement, and 63% of Music Fans strongly agree with the importance of music.

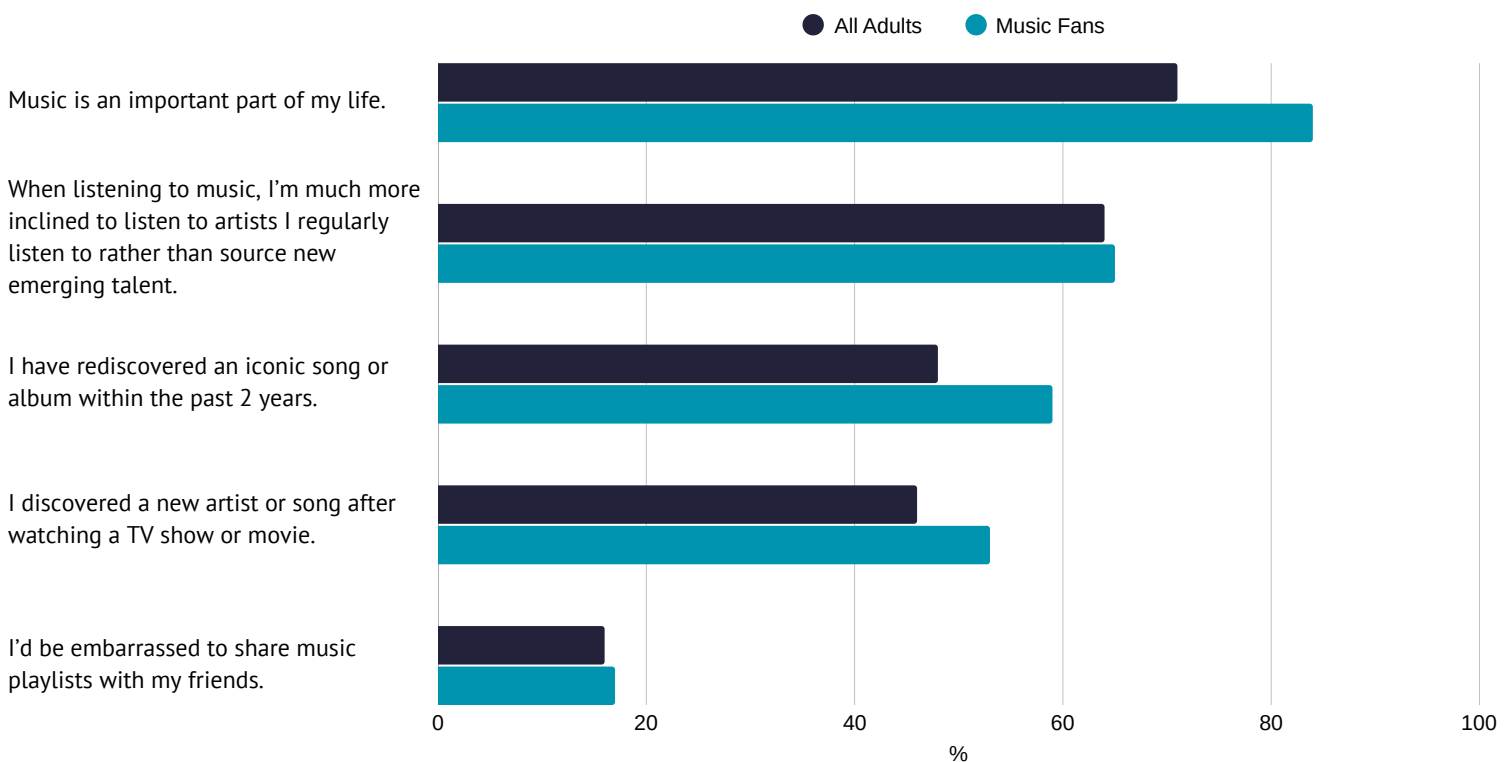
This sentiment while positive doesn't always fit with the stakeholders we spoke to where one leader in the sector emphasises that the Irish music industry struggles compared to the film industry, which has seen more growth and investment. They note, "If you compare it to the independent Irish film industry, that has seen a really good growth trajectory... there's been a lot of investment in Screen Ireland. But the music industry is definitely struggling.

Another leader highlights a shift in public sentiment towards valuing the arts, particularly during COVID-19, when people relied on arts and culture for comfort and entertainment. Despite this increased appreciation, they express concern that music still lacks investment compared to other art forms, adding, "There is a snobbery, maybe, in terms of investing in popular music that other art forms don't have to grapple with." Another participant suggests that music holds a significant but important role in people's lives. While it is highly valued, it often goes unrecognised compared to more active interests like sports or film: "I think music is very important to people... but it's a kind of passive importance. They don't really realise how important it is to them".

The research highlights that motivation and nostalgia are two key drivers for all adults' listening to music. One in two people (50%) say they "always" or "very often" pick certain music to "motivate or excite" them, and 40% say they "listen to music to trigger memories."

Music Fans, when compared with the general public, are more likely to engage with specific activities related to digital platforms. 39% of Music Fans "follow specific music artists on social media," 32% of the group "keep track of new music," 29% "often shazam to discover name of artist and song," and 24% "comment on or like music on social media."

Beyond social media and tech, one in four Music Fans (26%) say they "do music-related activities" in their free time.



Public Interest & Engagement - What does it all mean?







Music is deeply ingrained in Ireland's cultural identity. The COVID-19 pandemic emphasised the value of arts and culture, yet the music industry continues to struggle with underinvestment compared to other sectors. Generational differences reveal younger adults as more active listeners, driven by digital platforms, while older demographics tend to engage less actively. Addressing these dynamics can help the industry transform public interest into meaningful support for artists and live performances.

Recommendations:

1	Encourage more active public participation in the music industry by promoting live events and direct supports for local artists.
2	Expand music education initiatives to emphasise music's cultural and societal value, fostering lifelong appreciation.
3	Leverage the increased appreciation for the arts seen during COVID-19 to build sustainable engagement strategies.
4	Develop policies and incentives that convert public interest in music into direct financial support for artists. An example of this is a Culture Card, to encourage people to attend concerts, festivals, and live music events.
5	Strengthen collaborations between the music and film industries to enhance visibility and appreciation for Irish music. An example would be the introduction of a cultural test to Section 481 applications, such that music creation is part of film production, and a value is attached to same. Another example is the introduction of an additional incentive for the use of Irish music creators in audiovisual productions.
6	Utilise technology and social media platforms creatively to deepen public engagement with Irish music and broaden its reach. This should include full transparency in streaming service algorithms in relation to music discovery. It should also provide meaningful usage data and statistics of their works empowering artists to make relevant career choices.

Genres & Artists

			
<p>Pop, Rock, Classic Rock and Dance Pop are the most popular genres.</p> <p>64% of all adults say they listen to pop music, 43% to Rock or Classic Rock and 36% to Dance or Pop.</p>	<p>One-third of adults enjoy Irish genres but more likely to be older.</p> <p>Irish traditional and Irish folk are enjoyed by c. 30% of all adults, with more than 40% of those aged over 55 years old saying they like these genres.</p>	<p>Majority of music fans use digital platforms to listen to music.</p> <p>62% of Music Fans (high listeners) use YouTube (compared to 56% of all adults), and 37% use Spotify Premium (compared to 29% of all adults).</p> <p>55% of all adults listen to music on the car radio.</p>	<p>Over 70% of music fans listen at home doing housework or relaxing.</p> <p>78% of Music Fans listen to music doing housework, while 73% listen to relax at home.</p>

Genres, Artists, Radio & Platforms

Genre preferences show clear generational divides. Younger adults favour pop, dance, R&B, and hip-hop, while older listeners gravitate towards rock, Irish traditional music, and singer-songwriter styles.

Experts in the music industry shared mixed views on how different music genres are perceived by the Irish public. Some noted that certain genres, such as traditional Irish music, continue to have a strong following, particularly in tourist-heavy areas. As one put it, "If you're anywhere that has tourists, it's going to be trad for a lot of the summer." This genre remains integral to Irish identity, especially for visitors seeking a traditional experience.

Conversely, Irish country music holds a unique place in the hearts of Irish people. It is described as part of Ireland's love affair with a genre that is quite different from Nashville's country music. Country artists have proven their ability to sell out venues, showcasing the genre's loyal and passionate fanbase.

Other genres, like dance music, have experienced remarkable growth in recent years, with one industry expert noting the striking international success of Irish electronic artists. Similarly, hip-hop and R&B have gained momentum, with a notable increase in diversity within these scenes. One expert pointed out how Irish audiences are now more open to genres that would not have been widely accepted a decade ago, such as hip-hop performed in Irish.

Genres like rock and singer-songwriter music have maintained steady popularity. However, some experts called for more support and visibility for underrepresented genres, such as R&B, noting that increased promotion could help them thrive further.

Music discovery is evolving rapidly, shaped by the transition from traditional media like radio to digital platforms. Radio remains a key source of discovery for 49% of respondents, offering a sense of local identity by promoting regional artists. However, platforms like Spotify and YouTube have revolutionised discovery, allowing for algorithm-driven recommendations that expose users to global music. Younger audiences are more likely to engage with these platforms, discovering an average of nine new artists annually compared to only two for older adults.



This shift brings challenges for artists, particularly independent ones. While digital platforms lower barriers to entry, they also create a competitive environment where visibility is hard to achieve. The share of income received by creatives from streaming services is disproportionately low. While they have 'democratised music-making' by lowering barriers to entry, the overwhelming volume of content means competition is more intense than ever. This creates a paradox: while discovery is easier, sustaining a livelihood from streaming alone is challenging for many artists.

The uneven sharing of income in streaming - where artists and songwriters receive a disproportionately low share of the revenues - further complicates the landscape, with many artists struggling to earn sustainable incomes despite widespread distribution.

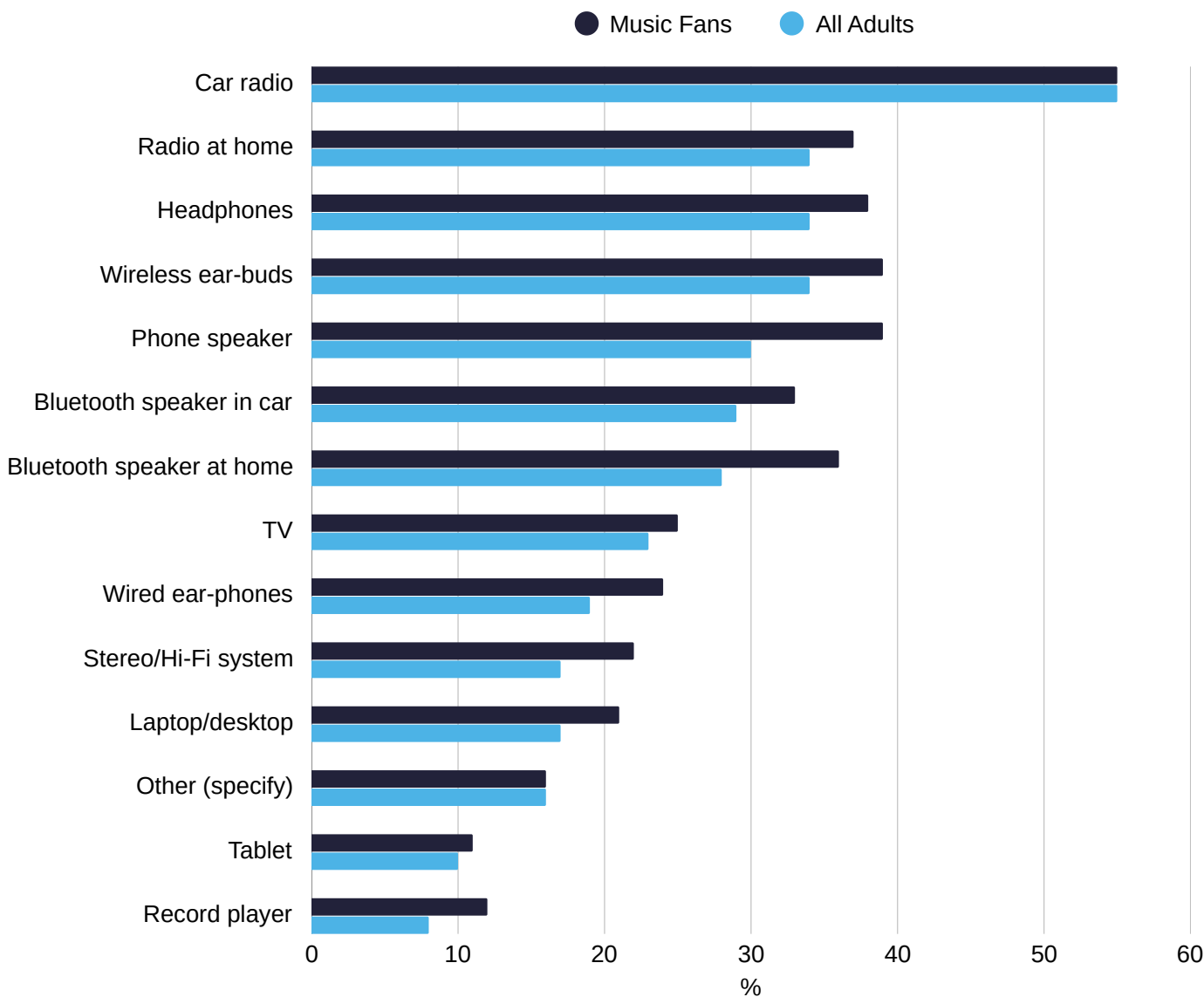
Generational differences shape how people discover new music. Older adults explore music based on interest in specific decades (70s, 80s, 90s), while younger listeners are driven by mood and occasion, such as finding "chill" or "party" music.

Genre is a key factor in music preferences across all age groups. However, aspects like the instruments used, the artist's country of origin, or cultural influences have a lesser impact on what people choose to listen to. This section reveals a shift from decade-based exploration to mood-driven music discovery, particularly among younger audiences.

Music consumption in Ireland predominantly occurs at home, with over 70% of respondents listening while engaging in household activities like cooking or relaxing. Commuting and other mobile activities also account for a significant portion of listening time facilitated by devices such as wireless headphones.

Radio still holds sway, especially among local listeners. One expert noted that radio stations continue to offer a "sense of local identity" by promoting smaller, regional artists. However, platforms like Spotify and Apple Music have changed the way music is discovered. As one noted, platforms like Spotify allow users to "discover music... unbelievably accessible" and expose them to global music with ease.

However, this ease comes with challenges. Over the past decade, user-uploaded content platforms have become one of the most popular ways for people to access music and other creative works. This has its advantages, such as allowing creators to share their work far more widely than ever before. However, the downside is that these same creators were not being remunerated fairly, if at all, for their work, leading to a huge market imbalance that threatened their livelihoods. This Transfer of Value, also referred to as the Value Gap, is the funnelling of value away from creators into the hands of a small number of global online platforms.



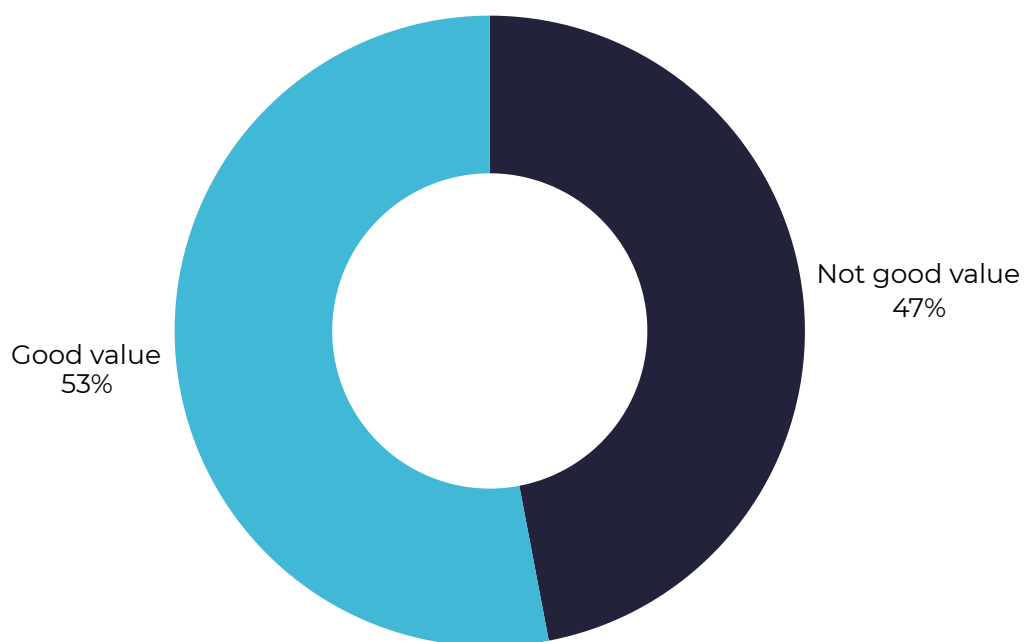


Despite these challenges, the shift to digital is largely seen as positive for discovery. One expert summarised: "It's really good for the discovery of music, really, really good," acknowledging that the ability to produce and share music online has empowered independent artists.

Streaming platforms are the dominant mode of music access, with 53% of the population subscribing to services such as Spotify, YouTube Music, and Amazon Music. Among "Music Fans," this figure rises to 65%, underlining their deep connection to digital platforms. Spotify holds the largest share of the market, reflecting its strong appeal among users seeking an extensive music library and personalised experiences. Physical formats like CDs and vinyl persist but remain niche, with 26% of respondents still using CDs.

Perceptions of Streaming Service Value

The graph illustrates public opinion on the value of music streaming services. It shows that while 53% of respondents perceive streaming platforms as offering good value, 47% believe they do not. This reflects the broader trend of digital music consumption, where platforms like Spotify, YouTube Music, and Amazon Music dominate the market, while physical formats such as CDs and vinyl maintain a smaller, niche audience.



Music Leadership perspectives on Technology Impact on Discovery



Impact of Streaming Platforms and Technology

Discovering music has never been easier with Spotify. As a user myself, I'm amazed by how effortlessly accessible it is.

The access to producing music is absolutely enormous... The amount of people that are actually releasing stuff is off the scale.

It's challenging to create a system that is both equitable and fair while still ensuring an enjoyable user experience. While Spotify does help independent artists and labels by providing a platform for promotion, it's not always the easiest option for everyone. Not all artists, without the appropriate marketing support, can simply upload their music to Spotify and expect it to reach an audience.

Shift from Traditional Media to Online Platforms

Radio used to be the primary source of getting to know about new music or what's upcoming and trending. Versus now, with the advancement of technology, everything is going digital.



Challenges with New Algorithms and Discovery

Spotify is increasingly shifting towards non-human-generated discovery. Your usage of the platform and the information you provide influence the type of music it recommends. However, the potential drawback is that a computer cannot always accurately predict what you might want.

If you look at it, there's so much on Spotify now that they're trying to find a way to make it easier for consumers, but in distilling it down, you might lose the discovery element of breaking artists.

Change in Revenue and Visibility

More Irish music is being produced than ever before, but the barriers to entry are much lower than they once were. However, larger companies and established bands have more resources and industry backing, making it easier for them to get selected. For radio stations, this means opting for the "low-hanging fruit" rather than sifting through dozens of emails each week to discover new talent.

Genres, Artists, Radio and Platforms - What does it all mean?







Ireland's music scene blends deep-rooted traditions with a vibrant contemporary landscape, making it a defining part of the country's cultural identity. Traditional Irish music, with its lively reels and soulful ballads, continues to thrive alongside modern genres, drawing in both locals and visitors who come to experience its unique charm. Genres like hip-hop and R&B have gained traction among younger audiences. Digital platforms like Spotify and YouTube have revolutionised music discovery, creating opportunities for Irish artists to reach global audiences. However, challenges persist, such as the "value gap" in User Generated Content and the intense competition for visibility on these platforms. Radio still plays a role in promoting local talent, but its influence is diminishing among younger listeners.

Recommendations:

1	Fairer share of streaming revenues for creators in the streaming ecosystem.
2	Study and apply lessons from countries like Sweden, Canada and South Korea to establish a stronger global brand for Irish music.
3	Full transparency around algorithms deployed by streaming platforms and ensure anti-fraud and stream manipulation measures are in place.
4	Enhance support systems for independent artists to ensure they can compete effectively with better-funded international acts.
5	Advocate for policy changes that address the "value gap" in online user-generated content revenue, ensuring fairer compensation for musicians, creators, and copyright holders.
6	Increase funding and marketing efforts for underrepresented genres to diversify and expand Ireland's music scene.
7	Encourage cross-genre collaborations (e.g., traditional Irish music fused with electronic or hip-hop) to drive innovation and attract a wider audience.

Value of Music

			
<p>€172 is the average annual spend by adults on music streaming.</p> <p>53% of adults claim to pay for music streaming with a market spend of €370 - €384 million.</p>	<p>€757 is the average annual spend by adults on music events.</p> <p>...</p>	<p>56% of the public say streaming services are good / very good value.</p> <p>...</p>	<p>66% of adults say cost of tickets is main barrier to attending gigs.</p> <p>...</p>

The Irish creative economy¹, which includes the music industry, employs 20,950 people. Of this, approximately 64% – or an estimated 13,400 individuals – work directly in the music sector².

Employment within the music industry tends to fluctuate, with seasonal opportunities, especially during the summer months. This highlights the important role the music sector plays in the broader creative economy, offering a diverse array of full-time and part-time roles in all regions of the country. However, only 43% of those working in the music sector hold full-time positions, with the majority either working part-time or supplementing their income through jobs outside of the music industry. In fact, around 68% of IMRO members rely on additional sectors to sustain their careers, reflecting the widespread dependency on external income sources. This reveals the financial challenges musicians face in making a living solely from their craft.

IMRO members often turn to non-music sectors for supplementary income. Common fields include teaching, I.T, communications, and administration. Teaching, in particular, offers flexibility, allowing musicians to focus on their craft throughout the summer months. Meanwhile, other sectors provide financial stability, often offering higher-than-average wages compared to the music industry.

This balance between music and supplementary roles in service-led industries underscores the financial difficulties musicians encounter. Earnings from music alone are often insufficient to support a full-time career. As a result, many rely on better-paid non-music roles to supplement their income.

The average annual income for all sectors (NACE) is **€46,567**, while those working in the arts, entertainment, and other service activities earn an average of **€28,123**.

¹The Irish Creative Economy includes those employed in creative arts and entertainment activities, including picture, video and television programmes, sound recording and music publishing activities.

²Source: CSO, Persons aged 15 years and over in Employment (ILO) <https://data.cso.ie/table/QES01>



Financial instability is a recurring issue for musicians. Half of IMRO members saw no change in their income over the past year, and 29% experienced a decline. Among those whose income dropped, 45% reported feeling financial pressure, with only 3% receiving grants. On the other hand, 23% of members saw an increase in income, with 20% of them benefiting from grants. This underscores the critical importance of financial support – particularly grants – in alleviating financial stress and helping musicians sustain their careers.

More than 2 million Irish consumers pay for music streaming services contributing to an estimated market value of €375 million. This research indicated that music fans are more likely to have multiple subscriptions, raising their average annual spend to €219. The growth of streaming services highlights the importance in how fans access and engage with music, showing that digital platforms are a key player in the music industry.

Large-scale music events attract over 30% of the population, with attendees spending an average of €298 annually.

Music Fans prioritise these events, spending more on large-scale gigs compared to smaller shows. Festivals also attract 16% of adults, with an average spend of €194.

Music fans spend more on large-scale gigs, averaging €326 annually, though they spend slightly less on small gigs (€90). They attend more live events than the general public, showcasing their deeper engagement with live music.

Whether at small gigs or large festivals, Music Fans higher attendance and spending underline their importance to the live music sector. Their commitment to live music experiences makes them a critical audience for the industry.

The cost of tickets is the biggest barrier to attending live gigs, with 66% of respondents citing it as the main reason for not attending. Additionally, 49% find accommodation costs prohibitive. Other barriers include travel difficulties, accessibility, and personal obligations like childcare. Addressing these financial and logistical challenges could improve access to live music events, particularly for those facing non-financial barriers such as accessibility or lack of nearby events.

Value of Music - What does it all mean?

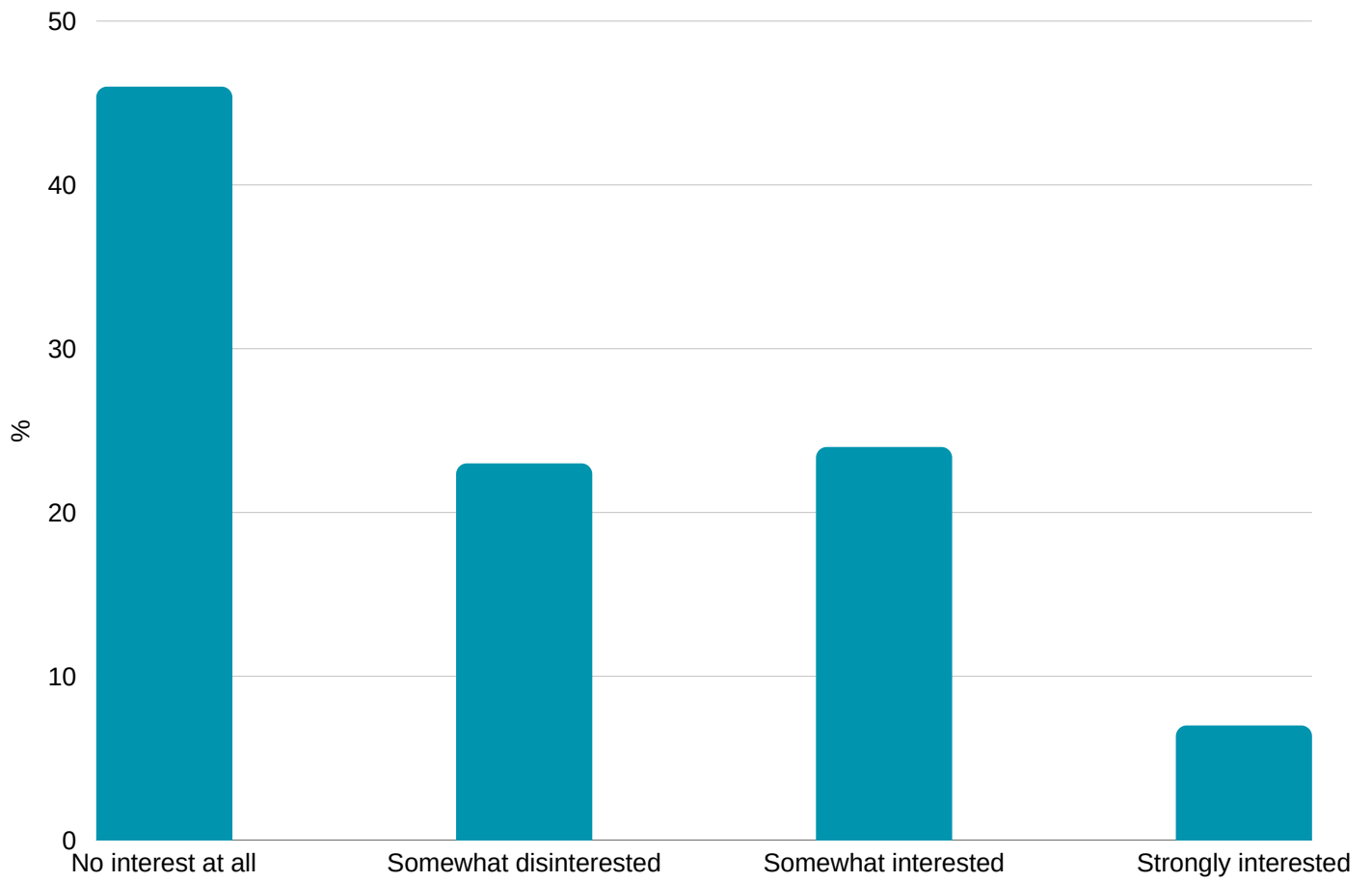


Ireland's music industry is a vital contributor to the national economy, generating €1 billion annually and employing over 13,400 people. Live music dominates consumer spending, but the industry's economic structure remains inequitable, with many musicians earning below the national average. Full-time artists face financial precarity, often requiring supplementary income from non-music jobs. While digital platforms have expanded access and visibility, they have exacerbated income disparities, leaving many creators under-compensated. Policies, grants, and innovative revenue models are needed to create a sustainable ecosystem that supports artists at all levels.

Recommendations:

1	Support financial stability for musicians by extending the Basic Income for the Arts scheme, increasing access to project-based funding, and fostering opportunities for income generation through touring support, international showcasing, and professional development initiatives.
2	Apply successful financial strategies from the film industry to strengthen Ireland's music sector. An example of this would be amending Section 481 to include music creation within the cultural test and tax incentives for using Irish music within Audiovisual productions.
3	Introduce targeted support measures to strengthen live music performances, such as the inclusion of live musical events and music festivals in tourism plans, development of the Night-Time Economy initiative, and infrastructure investment to boost revenue generation and contribute to Ireland's economy.
4	Work with streaming platforms and tech companies to develop fairer revenue-sharing models for artists.
5	Expand regional creative hubs beyond Dublin, fostering industry growth in cities like Cork, Limerick, and Galway.

Artificial Intelligence (AI)



The Future

Artificial intelligence (AI) is emerging as a topic of interest and concern in the Irish music industry. While 59% of respondents believe the state should take a proactive role in managing AI's impact, the majority (69%) express little interest in AI-generated music. Sector leaders recognise AI's potential to disrupt music production and distribution but highlight the uncertainty surrounding its long-term implications. The cautious reception reflects broader apprehension about the balance between innovation and artistic integrity.



Ireland's music industry reflects global trends, such as the dominance of streaming platforms and the challenges of generating revenue in the digital age. Countries like the U.S. and U.K. face similar issues with the unfair revenue share for creators in the streaming market, while nations like Sweden and Canada, with robust public arts funding, provide examples of how structural support can sustain music professionals.

Internationally, genres such as K-pop and reggaeton illustrate the globalisation of music tastes, highlighting opportunities for cross-cultural exchange. In contrast, Ireland's music industry struggles with underinvestment compared to more robustly funded sectors like film. This lack of support hampers the ability of Irish artists to compete on an international stage despite the country's rich musical heritage.

The 2025 Music Industry Report emphasises the importance of music in Irish life while highlighting the financial and structural challenges facing the industry.

Public engagement is high, and live events continue to be a vital cultural activity, reflected in the success of venues like the 3Arena in Dublin, which is one of the highest-attended live music venues per capita in the world. However, despite this strong public interest, the economic realities for professionals remain challenging. The industry requires more significant investment and policy support to address income disparities and foster growth, particularly for independent and emerging artists. The integration of digital platforms and AI offers both opportunities and challenges. Strategic government intervention and industry collaboration are needed to harness these technologies while ensuring fair compensation for creators.

Drawing from international models, Ireland could bolster its music sector through targeted funding, promotion of diverse genres, appropriate guardrails in place for AI, and support for grassroots initiatives, ensuring that its cultural legacy continues to thrive in a rapidly changing landscape.

The Future - What does it all mean?



As the global music industry evolves, Ireland faces both challenges and opportunities. Artificial intelligence (AI) is emerging as a transformative force, offering new tools for music creation and discovery while raising ethical questions about artistic integrity.

International models like Sweden and Canada's government-supported music ecosystem and South Korea's strategic branding offer valuable lessons. To remain competitive, Ireland must invest in education, global marketing, and infrastructure while fostering innovation and inclusivity. The industry's future depends on its ability to adapt to technological advances and shifting consumer behaviours.

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IRELAND: MUSIC REPORT 2025

THE CULTURAL AND ECONOMIC VALUE OF MUSIC

Appendix

Summary of Recommendations

Artificial Intelligence (AI):

1	Advocate for fair AI legislation and regulations to protect the music industry: Fully implement the EU AI Act and ensure platforms conform to their transparency obligations and that a regulated market is maintained for the licensing of existing copyright works.
2	Protecting Performers' Rights: Digital cloning of an artist's voice or likeness without consent is a serious threat. IMRO supports introducing new personality rights legislation in Ireland, inspired by protections in the SAG-AFTRA 2023 Agreement ⁴ , ensuring creators retain control over their own identities.
3	Economic Support for Creators: IMRO agrees with the AI Council's recent recommendation ⁵ concerning the provision of financial incentives, delivery of AI literacy programmes, and establishment of innovation hubs to help creators adopt and effectively use AI tools. This fosters creativity, collaboration, and global competitiveness in the creative sector. Notably, institutions like Berklee College of Music (US) and Abbey Road Studios (UK) already offer AI-focused music courses, highlighting the growing importance of AI education in the industry.
4	Preserve human artistry while exploring AI's potential: use to enhance creativity rather than replace it.

Public Interest & Engagement:

1	Encourage more active public participation in the music industry by promoting live events and direct supports for local artists.
2	Expand music education initiatives to emphasise music's cultural and societal value, fostering lifelong appreciation.
3	Leverage the increased appreciation for the arts seen during COVID-19 to build sustainable engagement strategies.
4	Develop policies and incentives that convert public interest in music into direct financial support for artists. An example of this is a Culture Card, to encourage people to attend concerts, festivals, and live music events.
5	Strengthen collaborations between the music and film industries to enhance visibility and appreciation for Irish music. An example would be the introduction of a cultural test to Section 481 applications, such that music creation is part of film production, and a value is attached to same. Another example is the introduction of an additional incentive for the use of Irish music creators in audiovisual productions.
6	Utilise technology and social media platforms creatively to deepen public engagement with Irish music and broaden its reach. This should include full transparency in streaming service algorithms in relation to music discovery. It should also provide meaningful usage data and statistics of their works empowering artists to make relevant career choices.

Genres, Artists, Radio & Platforms:

1	Fairer share of streaming revenues for creators in the streaming ecosystem.
2	Study and apply lessons from countries like Sweden, Canada and South Korea to establish a stronger global brand for Irish music.
3	Full transparency around algorithms deployed by streaming platforms and ensure anti-fraud and stream manipulation measures are in place.
4	Enhance support systems for independent artists to ensure they can compete effectively with better-funded international acts.
5	Advocate for policy changes that address the "value gap" in online user-generated content revenue, ensuring fairer compensation for musicians, creators, and copyright holders.
6	Increase funding and marketing efforts for underrepresented genres to diversify and expand Ireland's music scene.
7	Encourage cross-genre collaborations (e.g., traditional Irish music fused with electronic or hip-hop) to drive innovation and attract a wider audience.

Value of Music:

1	Support financial stability for musicians by extending the Basic Income for the Arts scheme, increasing access to project-based funding, and fostering opportunities for income generation through touring support, international showcasing, and professional development initiatives.
2	Apply successful financial strategies from the film industry to strengthen Ireland's music sector. An example of this would be amending Section 481 to include music creation within the cultural test and tax incentives for using Irish music within Audiovisual productions.
3	Introduce targeted support measures to strengthen live music performances, such as the inclusion of live musical events and music festivals in tourism plans, development of the Night-Time Economy initiative, and infrastructure investment to boost revenue generation and contribute to Ireland's economy.
4	Work with streaming platforms and tech companies to develop fairer revenue-sharing models for artists.
5	Expand regional creative hubs beyond Dublin, fostering industry growth in cities like Cork, Limerick, and Galway.

Research Approach

<p>Quantitative Survey:</p> <p>General Public</p> <p>Fieldwork dates:</p> <p>February / March 2024</p> <p>Objective:</p> <p>The objective of the Omnibus research is to gauge people’s interest in music compared to other cultural events, their attitudes towards the development of the music industry, and their behaviours and attitudes when it comes to consuming music.</p> <p>We also collected information on how much they spend on music-related activities.</p>	<p>Quantitative Survey:</p> <p>IMRO Members</p> <p>Fieldwork dates:</p> <p>July / August 2024</p> <p>Objective:</p> <p>The objective of the members survey is to validate some of the findings from the Omnibus (Nationally representative survey) and understand what IMRO members see as the challenges within the music industry today.</p>	<p>Stakeholder Research:</p> <p>In-depth interviews</p> <p>Fieldwork dates:</p> <p>September / October 2024</p> <p>Objective:</p> <p>The objective of this stream of work is to validate the findings from the previous pieces of work and to delve deeper into some of the topics that were discussed.</p> <p>Findings from this qualitative phase are incorporated into this document.</p>
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Prepared by Core Research for IMRO

June 2025