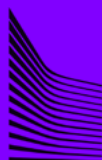


Mexican music industry Market report



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Introduction: How to work best with Mexico as a European music Exporter

This report is the result of a desk research and a fact-finding mission to Mexico in the winter of 2021. The report gives an overview of how the music market and the music ecosystem works in Mexico. In this introductory chapter, some insights are provided for those seeking key elements to understand how to start exporting music to Mexico.

Geographic situation and its opportunities

Geographically Mexico is part of North America but also Latin America. So, on the one hand Mexico is very connected to and influenced by the USA, and on the other it is part of the Latin world. This positions Mexico to be an attractive market for Latin-American artists who want to break into the US market, as well as international artists who come down south from the US to Latin America. For European acts, it can represent an extension of their tours in the US and an open door to other Latin American markets. In fact, an artist who has already registered a good digital consumption in Mexico and has already played in Mexico will have many more possibilities to be booked on Latam festivals.

Music and Mexicans

Mexicans are strongly engaged with music and it is part of their daily life. This is a strong specificity of the Mexican market. Mexicans listen to a lot of music from domestic and international repertoires. It is an accessible market for European artists since all the major DSPs are also operating in Mexico, with Mexico City often called the streaming capital of the world. Spotify is the leader of the market and the main social networks are also available in Mexico, with a growing interest for short video content (TikTok). Building an artist's profile could be done prior to live appearances with the help of a local PR agency. But if you can afford coming over, it will help the agency to reach better results. Some of the companies offering PR will also be able to help you with finding live shows and connecting you to festivals, as they're multi-service agencies.

Mexicans also go to concerts and festivals. The main live music cities are Ciudad de Mexico (CDMX), Guadalajara and Monterrey but there are also a lot of opportunities in intermediate cities and tourist places. Mexico presents good infrastructure with venues varying in size (even if intermediary venues are lacking - from 400 to 900 seats) and a lot of festivals. Among them, some private festivals are booking international acts.

Travelling in Mexico

Mexico is a huge country so distances can be overwhelming. Therefore, a lot of routes are done by plane. If you travel by land, it is generally advisable to check the current security risks. Places where rival cartels are having a turf war are the most dangerous. At the time of writing those are: Michoacán, Guerrero or Sinaloa. A drive from e.g. Guadalajara to Mexico City is about 6 hours and is usually safe. But travelling to Monterrey, Mexico's third biggest city can easily take more than 10 hours by car. Distances from Mexico City to the Caribbean or to Baja California are also massive, so that those routes are often done by air. There exist several low-cost airlines.

Doing business in Mexico

Mexico is a market where Europeans can do business in a good environment: Mexican professionals are open to international relationships and acts, the market is relatively structured with music professionals for all the activities of the music industry (synchronisation, PR, digital marketing, promoters, bookers and so on).

Nevertheless, some elements are important to take into account because there is a lot of informality in the sector which can be difficult to navigate:

- Most professionals do not speak English, so it is better to communicate in Spanish to work with Mexico.
- Since Mexico is a very Catholic country, family values play a very important role. Therefore friendship is key for later business transactions. Food & Drinks are a vital part for forging relationships with the Mexican professionals.
- Not all the promoters are reliable. It is important to be sure of the skills and trustworthiness of your Mexican partners before working with them.
- Everything needs to be negotiated in Dollars and part of your negotiations will probably be on WhatsApp.

There might be differences when it comes to reaction times in communication or preliminary lead times within project planning. Mexicans sometimes avoid bringing up difficulties directly, but in the end most things work out fine even at short notice. In general, Mexicans are extremely friendly and kind, it's a pleasure working with them.

The professional live music sector is a rather new one in Mexico. Before 1990 it was hardly possible to organise live music events legally due to governmental restrictions regarding public gatherings of bigger crowds. Therefore it was initially local actors, who started working on establishing the sector and international actors started rather late to invest in the territory.

Mexico offers huge potential as a digital music market with an extremely high digital music consumption. But be aware that streaming figures might be misleading. As one local PR expert put it: "A lot of artists and labels realise that Mexico City is within the top 3 of their cities worldwide when it comes to streaming figures. What they're not aware of is that this doesn't mean much. Due to the incredible high streaming numbers almost every artist that appears in international playlists has Mexico City in his top 3 cities worldwide!". Nevertheless it is not only a market with great potential itself, but can also become a good strategic entry point for Europeans working towards the southern states of the US market or some parts of Latin America. If you build a fanbase in Mexico with comparatively reasonable expenditure it will help you find shows and media attention in the US, because they will notice your presence in Mexico.

Regarding safety: drug cartels are strongly involved in the music business. You won't find public information on this sensitive issue, but you can hear from various local professionals about the diverse aspects of this involvement in a very discreet way – music venues, clubs and festivals are suitable outlets for their business. Venue owners or event organisers are often urged to make this possible, otherwise they're facing serious threats or have to close their venues. It has been expressed that more music venues have been closing down in the last few years due to these sorts of incidents than problems related to the pandemic. Some cartels are in charge of organising private music events too. We have been told that cartels also directly invest in building artist's careers, that as a countertrade release songs that are glorifying drugs. Saying all that, one has to state that as a tourist, foreign visitor of music events or an act performing at music events these connections will not be visible or affect your business. There are unsafe areas that should be avoided and of course one should avoid getting in touch

with drug business, but the Mexican music business in total does not seem dangerous for rational acting people from Europe.

Festival and concert ticket prices are lower than in most European countries or the US, that reflects in offers for fees and should be included in the financial calculations if a tour is affordable or reasonable. Sponsorship is a common way to acquire extra budgets. The technical standards and availability of equipment, while generally considered high, at venues and events sometimes still require the preparedness for compromises.

1. General national context

Society		Source
Population (2021)	130 262 000	UN data
Official language(s)	Spanish	
Other language(s)	68 national languages, 63 of which are indigenous	
Recommended language to communicate with local professionals	Spanish	
Currency	Mexican Peso (MXN)	UN data
Exchange rate (First semester 2022 average)	EUR 1 = 22.1653	European Central Bank
Population growth rate (average annual % – 2021)	1,1 %	UN data
Urban population (% of total population)	80,4 %	UN data
Life expectancy at birth (females/males, years – 2021)	77,8 / 72,1 %	UN data
Population age distribution (0-14/15-59/60+ years old, % – 2021)	25.5 / 63 / 11,5	UN data
Human Development Index (2021)	0.758	UNDP
Gini coefficient (2020)	45,4	World Bank
Economy		
GDP (million current US\$ – 2021)	1 256 441	UN data
GDP per capita (current US\$ – 2021)	9 848.6	UN data
YOY growth (annual %, const. 2015 prices – 2021)	-0,3 %	UN data
Unemployment rate (% of labour force – 2021)	3,6 %	UN data
Minimum wage (per month – 2022)	MXN 5,258.1 (US\$ 256.3) ¹	Country Economy
Communication		
Smartphone in use (% of users aged 16 to 64)	98,5%	DATAREPORTAL
Mobile use (number of – in millions)	119.8	DATAREPORTAL
Individuals using the Internet (share of population)	70.1%	UN data

1.1 Social and economic context description

Mexico is the second largest economy in Latin America and the fifteenth largest economy in the world. The country has been showing a steady but moderate growth before the pandemic (an average of 2%) and is expected to experience the same moderate post-Covid growth according to OECD (+1,9% in 2022 and + 2,1% in 2023)². While the economic fundamentals remain solid, the Mexican economy was affected by the pandemic (-8,2% GDP in 2020) but was also characterised by high level of informality (55% approx. of the workers are under informal employment status in 2020), financial exclusion (63% of the population aged over 15 has an account at financial institution in

¹ This is a national floor-level wage – and will vary depending on geographical areas and other criteria.

² OECD ECONOMIC OUTLOOK, VOLUME 2022 ISSUE 1: PRELIMINARY VERSION, OECD, 2022.

2017) and corruption. What is more, women's labour market participation is way under the OECD average (47% for Mexico, 69% for OECD average)³ and inequalities stand quite high (its Gini index stands much higher than most of advanced economies and close to the emerging economies median).

Nevertheless, Mexico remains one of the strongest and most stable economies of the American continent. It is a very open country, defending free trade and involved in 12 free trade treaties with 46 countries. The United States is Mexico's main economic partner, receiving 80% of Mexican exports.

1.2 Political and administrative context

Mexico, officially The Mexican States, is a federal Republic composed of 32 states. It is a democracy where the President is elected for 6 years and cannot renew its mandate. Mexico is divided into three levels of government: the federal Union, the states and the municipalities.

Last presidential elections took place in 2018 with Andrés Manuel López Obrador elected as the first left wing President in 9 decades. The federal legislature is composed of the Senate of the Republic and the Chamber of Deputies.

1.3 Geography and demography

Mexico is the most populated Spanish-speaking country in the world with 130M inhabitants according to UN Data. Urban population represents 80,4% of the global Mexican population and the most populated areas are Valle de Mexico (21M inhabitants), Monterrey (5,3M inhabitants), Guadalajara (5,2M inhabitants)⁴. These are the most important cities for the music industry. But Mexico also has 35 cities with more than half million inhabitants and these cities are also very important for music: Tijuana, Puebla, Juarez, Ecatepec, Leon and others..



Figure 1. Main cities in Mexico

Source: maps-mexico-mx.com⁵

³ Economic Survey of Mexico, OECD, February 2022

⁴ <https://www.citypopulation.de/en/mexico/metro/>

⁵ Source: <https://maps-mexico-mx.com/mexico-map-major-cities>

The surface area of Mexico is 1 964 375 km² (four times the size of France, for example). Between the different urban areas and cities (see the map) trains are not really available so there are two options for transport: roads or flying. The main federal roads are good in Mexican territory but the secondary states' roads are mixed and the quality depends on the states. So the roads are good between Guadalajara and Mexico and these cities can be connected in 6 hours' drive. But the distance between Monterrey and Mexico City easily leads to a 10 hours' drive and one needs to verify the quality and safety of the roads to go in Northern cities for example. As a consequence, flying is often the preferred mode of travel. There are several airports in Mexico and Aeroméxico, the local airline company is operating 600 flights per day between the most populated or touristic cities⁶.

1.4 Climate

Mexico has an enjoyable climate, mostly relatively hot (yearly average of 17,4° in CDMX) and sunny. Half of the territory has a dry climate, one quarter a mild climate and the rest a hot climate. The north observes stronger temperature variations (winters are colder) than the south more characterised by stable temperatures. However, the variation of climate from a city to another also depends on the altitude since Mexican territory and regions have very different terrain and the distance from ocean (Pacific and Atlantic). Which leads Mexico to be composed of a lot of different climates. Between June and November, Mexico can also observe hurricanes. The dry season takes place from October to May and the rainy season is from June until September.

1.5 Media and Entertainment context⁷

According to the PWC entertainment and media (E&M) report, the E&M sector will continue to grow in the next four years driven by internet access growth, traditional TV revenues and internet advertising. The country will observe one of the strongest growth rates in the world.

The report estimates that Over-the-top media (OTT)⁸ services will continue to grow. Mexico currently has the biggest OTT market of Latin America with local and international companies. Despite this concurrence, traditional TV will also observe a growth with new subscription offers and new types of contents. Music, radio and podcast segments will also continue to grow and exceed 1 billion dollars in 2026 led by music. As a result, Mexico will continue to be a leader in the Region.

⁶ Tapachula (Chiapas), Monterrey, Guadalajara, Cancún and Mexico

⁷ Global Entertainment & Media Outlook 2022–2026 Capítulo México, PWC, 2022. Online: <https://www.pwc.com/mx/es/industrias/tmt/gemo.html>

⁸ OTT or over-the-top media service is a media service offered directly to viewers via the Internet. See more: https://www.wikiwand.com/en/Over-the-top_media_service.

2. Music ecosystem and institutional structure: organisations, unions and copyright collection societies

2.1 Collective Management organisations

SACM (*Sociedad de Autores y Compositores de México*) was created in 2007 but emerged from its precursors known as *Sindicato Mexicano de Autores, Compositores y Editores de Música (SMACEM)* created in 1945. SACM is the only authors, composers and publisher's collection society authorised by the Mexican copyright law in Mexico. It collects public performance rights and mechanical rights. <http://www.sacm.org.mx/>

EMMACSACM was created in 2009 and is the result of the union of Sociedad de Autores y Compositores de México, Sociedad de Gestión Colectiva de Interés Público (SACM), who represents all Mexican authors of musical works, as well as its counterparts from all over the world, through international collaboration agreements, and Editores Mexicanos de Música, A.C. (EMMAC), which represents major, and independent publishers. It issues licences for digital music and collects the corresponding rights. http://www.emmacsacm.com.mx/EMMAC2_EN/index

SOMEXFON (Sociedad Mexicana de Productores de Fonogramas, Videogramas y Multimedia) is the collection society for record labels. It collects for its licensed members sound recording rights for communication to the public in the areas of public performance and broadcast.

ANDI (Asociación Nacional de Intérpretes) and **EJE** (Sociedad Mexicana de Ejecutantes de Música) are two performers rights collection societies in charge of the collection in the arenas of public performance and broadcasting.

Types of rights in Mexico	
Copyright	
Radio	Yes
TV	Yes
Public performance	Yes
Mechanical rights	Yes
Digital rights on DSP	Yes
Digital rights on UGC services	Yes
Neighbouring rights	
Radio	Yes
TV	Yes
Public spaces	Yes but non-efficient collection
Private copy	No

2.2 Music industry trade body/union

AMPROFON is representing Mexico's recorded music industry and is affiliated with the International Federation of Phonographic industry.

EMMAC represents the publishers in Mexico. The biggest publishers in Mexico are part of this association: Azteca, Peermusic, Warner Chappell, Universal Music Publishing, Sony Music Publishing, etc.

<https://www.emmac.mx/>

Coalición por el acceso legal a la cultura is a cross creative industries association whose aim is to represent the interests of the creative industries in the domain of intellectual property.

<https://www.calc.mx/quienes-somos>

2.3. Music conventions

Feria Internacional de Música (FIMPRO) – May – Guadalajara

<https://www.fimguadalajara.mx/#!/en>

FIMPRO was created in 2012 and offers artist showcases (rock, pop, indie, world, jazz), panels, workshops and networking sessions.

In 2019, there were 1537 delegates from 25 countries at this convention. It is one of the leading conventions in Latin America. Delegates mostly come from Mexico, USA and Latin America and all the music industry sectors are represented. The convention is well organised and connections with local professionals are easy to build. It is highly recommended for an European professional wanting to develop its activity in Mexico to join this conference.

MARVIN FESTIVAL – May (but October in 2022) – CDMX

<https://festival.marvin.com.mx/>

MARVIN festival is before anything else a music festival with local and international acts. Two days before the public festival, there is a professional convention mostly gathering local indie professionals. In 2019, there was a Spanish and Argentinian delegation.

Before the pandemic, the **NODO** convention was associated with the NRML festival. It used to be a very important meeting for the indie scene in Mexico. The Nodo did not take place in 2019 and the NRML festival was cancelled again in 2022 so the NODO convention is quite insecure. But it is an event to keep an eye on!

Smaller and niche professional events such as the **DJ World Music Business** taking place in October in CDMX focusing on electronic music or the very recent **Can-cún Music Week** also focusing on electronic music are also taking place in Mexico.

3. Recorded industry in Mexico

Key points

- Music consumption is very high in Mexico with Mexicans strongly engaging with music. Most of this consumption is happening on DSPs even if radio is still strong in the country.
- Spotify is far from the leader in the country. Mexicans are also willing to pay for music, adopting the subscription model. YouTube is also very important in Mexico.
- Mexicans are very open to international music. They used to mostly listen to a lot of rock and music from North America (international pop). They now listen to more and more Latin American music (reggaeton, Latin pop, Latin trap) and also local music (Regional Mexican pop) plus electronic music and music from Europe.
- Having a good PR strategy in Mexico often results with a strong increase of streams for an artist.
- Majors are still representing the biggest market share.

3.1 Recorded music revenues in Mexico

In 2021, Mexico observed the same trends as the rest of Latin America with an impressive year-on-year growth of 27.7% in comparison to 2020. This growth is slightly inferior to the region (+31,2%) and led Mexico to stay part of the top 15 markets in the world. With a market size of \$284,7 million, Mexico is the second biggest market of Latin America behind Brazil and we can expect a continuing year-on-year growth in the next few years for the Mexican market. (source: AMPROFON).

3.1.1. Recorded music revenues share by sector

The revenues of the Mexican market are almost exclusively composed of digital music from audio and video streaming platforms. It represents nearly 90% of the revenues.

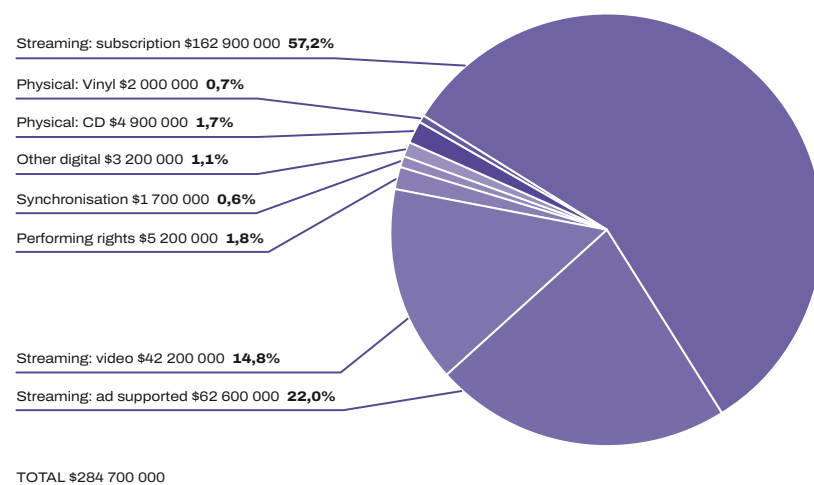


Figure 2. Recorded music revenues share by sector

Source: AMPROFON, 2022⁹.

⁹ Graph based on: AMPROFON. El Reporte Música México, Industria 2022, Amprofon, Fimpro, Relatable, Casete, Universidad de

Mexico is a thriving market because of its subscription audio streaming services segment that represents a solid share of the market (57%) and because this segment is steadily growing. Part of the Mexican population is willing to pay for music and the result is visible in the figures. This does not mean that conversion to payment is easy in Mexico as one can see with the ad-supported audio streams segment still representing 22% of the market and video stream 15%. But Mexican consumption has switched from piracy to streaming video and is now switching to audio consumption (in freemium and premium). Nota bene: piracy is still present in Mexico according to different sources (IFPI data on music consumption per medium, United States Trade Representatives – USTR watch list).

3.1.2. Evolution of music revenues in Mexico

The market used to be composed of physical sales but this segment suffered a strong decrease during the last decade that fortunately is now compensated by streaming revenues. Income from synchronisation and public performance rights are very low and decreasing in Mexico (-16.5% and -38% respectively). As a result, the market is driven by digital. However, it is interesting to notice that vinyl revenues are growing even if it only represents \$2M, the equivalent of 1% market share.

3.2 Music consumption medium and demography in Mexico

What makes Mexico very interesting is the relation Mexicans have to music. Mexicans are strongly engaged with music and music is part of their daily life. In fact, they spend much more time than the rest of the world listening to music and Mexico is the leader in terms of music consumption among the 20 biggest markets. It is also the leader among the countries that spent the most time listening to music through paid subscription streaming and among the countries with highest monthly use of short form video apps (68% of this time involves music such as lip syncing and dance challenge). All the consuming data is available in the “Comprometidos con la música 2021”, a report by IFPI and Amprofon¹⁰.

Another interesting fact is that with the pandemic, live-streamed concerts proved to be very popular in Mexico with Mexicans’ engagement being the highest after Brazil.

The fact that the Mexican population is heavily listening to music and more and more through subscription models (and as we will see later also in live and for a wide range of music) reinforces the value of its markets for internationals. As a result, recorded music is listened to in various ways in Mexico but the artist development in Mexico has to be focused on DSPs and playlists strategies and social media with short video contents.

3.3 Music genre consumption

Mexico is characterised by a large representation of music genres consumption. It is a very pop-rock country and of course a very Latin music country with 7,1% of the population choosing Regional Mexican representing as very important genre and 10,8% Latin pop or 3,9% reggaetón in 2019.

Guadalajara. Online: <https://www.musicamexico.org/reporte/reporte-musica-mexico-04.pdf>

10 https://amprofon.com.mx/es/media/boletines/comprometidos/ifpi_mcs.pdf

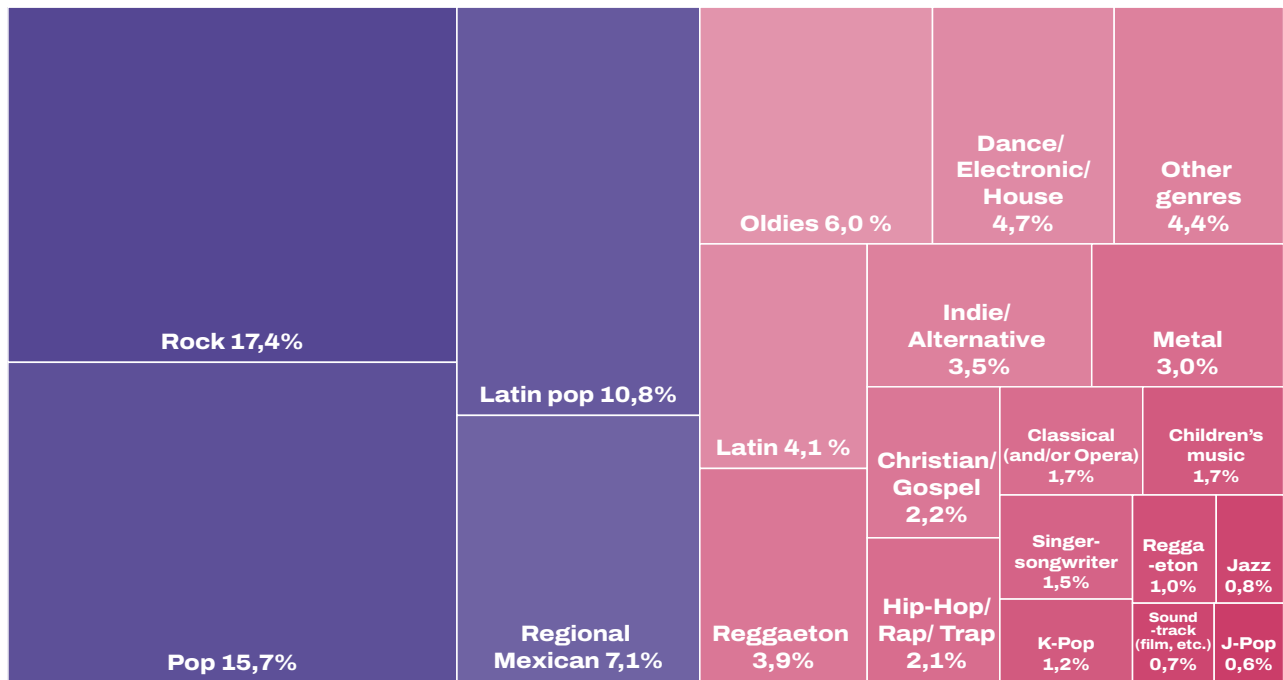


Figure 4. Music listening preferences by genres (% of survey responses)

Source: AMPROFON, 2020¹¹.

If this strong music diversity taste is a specificity of Mexico, it hides another reality: the consumption is also local and Spanish. What is more, GenZ is listening to a lot of Latin trap and other types of Latin urban music as well as reggaetón and Regional Mexican Pop (RMP). Observing a top 200 as we speak, it results that one-quarter of the tracks are reggaetón music followed by Latin music and Latin Trap/hip hop. Pop and Dance music represent almost a quarter of the tracks. In terms of artists nationalities, one quarter is from Puerto Rico, another quarter is from Mexico. Then from the USA and Columbia. The rest are coming from Argentina, UK, Panama and Spain.

Focus on Regional Mexican Pop (RMP)

Beside Latin trap, reggaeton and pop-rock music, the Regional Mexican Pop is the main consumption genre on DSPs and represented in 2019 39 billion streams. RMP is composed of a lot of sub-genres, it encompasses sub-genres from the different regions of Mexico, from Mariachi to Cumbia for exemple. These are traditional music genres but played by a younger generation revisiting sounds and styles. It allows a stronger local consumption, rising from year to year (+540% increase in 5 years on Spotify). This genre is an opportunity for the local scene to develop and for the indie record label to reinforce their strength and economy in the Mexican market¹².

¹¹ Graph based on: Panorámica de la Industria de la música grabada en México, AMPROFON, 2020 Online : https://amprofon.com.mx/es/media/documentos/gmr_2020.pdf

¹² "Unleashing the power of local potential: the global rise of Regional Mexican", Believe, JUN 16, 2022 Online: <https://www.believe.com/blog/unleashing-power-local-potential-global-rise-regional-mexican>

3.4 Music audio streaming ecosystem in Mexico

In Mexico, half of the internet users listen to music on an audio streaming platform¹³. As a result, Mexico is estimated to have 57 million audio streaming users and among them 16 million subscribers¹⁴. Most of the international DSPs are available in Mexico: Amazon Music (2018), AppleMusic (2015), Tidal (2015), Claro Musica (2014), Napster (2014), Deezer (2013), Google Play Music (2013), YouTube Music (2018), Spotify (2013). Spotify is by far the leading DSP in Mexico. Most of the estimations consider that half of the music audio consumers are on Spotify, and a CIU study estimated that 80% of the consumers are listening music on Spotify¹⁵. It is also estimated that a little bit more than half of the subscribers are on Spotify. The second DSP in Mexico is YouTube Music with between 5% and 15% according to different sources and studies, closely followed by AppleMusic. The other DSPs have a very small market share. However Deezer has been observing a strong growth recently thanks to its partnership with Azteca TV

YouTube is also a big player in Mexico and the country is a very video centric-market. According to Datareportal¹⁶ 83% of the internet users are using YouTube in Mexico. It is one of the most visited websites after Google. What's more, music is the second aim to watch YouTube videos and 69,8% of the internet users aged 16 to 64 watch music videos every week (with a growing trend). This population spend an average of 22,8 hours per month on YouTube¹⁷. YouTube registered the most important music consumption of all DSPs and social networks. It is a millennial platform.

Focus on Spotify

Spotify is the leading platform in Mexico and the country is also one of the biggest markets for Spotify. Even if only 21% of the monthly active users of Spotify and “only” 21% of its subscribers are based in Latam, the region is a fast growing one for the company and led Spotify to exceed their expected result in Q3 2022: “The firm’s subscriber growth, meanwhile, was partly chalked up to “outperformance across all regions led by **Latin America**” as well as better than expected Q3 promotional campaign results across all regions.”¹⁸. Spotify has several offices in Latam: CDMX (Mexico), Bogota (Columbia), Rio de Janeiro and Sao Paulo (Brazil), Buenos Aires (Argentina). Mexico represents almost 40% of the Latam Spotify subscribers and is certainly in the top 5 or 10 countries for Spotify after the US, UK, Germany, Brazil. In 2020; Spotify launched its first Spotify award in CDMX.

Most of the Latam catalogue is available on Spotify and Mexicans listen to a lot of playlists. The most famous ones with Latin American music are « ¡Viva Latino! » and « Baila Reggaeton » with more than 10 million subscribers.

13 Anuario estadístico 2021, Instituto Federal de Telecomunicaciones.

Online: https://www.ift.org.mx/sites/default/files/contenidogeneral/estadisticas/anuarioestadistico2021_1.pdf

14 El Reporte Música México, Industria 2022, Amprofon, Fimpro, Relatable, Casete, Universidad de Guadalajara.

15 Study: Spotify has 80.7% of Mexico's music streaming market, Stuart Dredge, January 28, 2021. Online: <https://musically.com/2021/01/28/study-spotify-has-80-7-of-mexicos-music-streaming-market/>

16 Digital 2021, Kepios, Hootsuite and We are Social, 2022. Online: <https://datareportal.com/reports/digital-2022-mexico>

17 Digital 2021, Kepios, Hootsuite and We are Social, 2022. Online: <https://datareportal.com/reports/digital-2022-mexico>

18 “Spotify added 7M premium subscribers in Q3 – and has added 15M in 2022 to date”, Tim Ingham, October 25, 2022. Online: <https://www.musicbusinessworldwide.com/spotify-added-7m-premium-subscribers-in-q3-and-has-now-added-15m-in-2022-to-date/>

3.5 Neighbouring rights

Mexico has a relatively good legislation around neighbouring rights and is part of the following conventions and treaties:

- Rome International Convention for the Protection of Performers, Producers of Phonograms and Broadcasting Organizations, 1961¹⁹
- Convention for the Protection of Producers of Phonograms Against Unauthorized Duplication of Their Phonograms, 1976²⁰
- WIPO Performances and Phonograms Treaty, 1996²¹

Neighbouring rights are recognised for record labels and performers. The term of performers rights is 75 years after the first recording of the songs or first interpretation of the creation or the first broadcast of the creation. The term of recording rights is 75 years after the first recording. SOMEXFON is the collection society for record labels and ANDI/EJE are the collection societies for performers.

Neighbouring rights collection over radio and TVs is working in Mexico, but the collection is more complicated when it comes to public performance in bars and public spaces. A significant part of these places refuse to pay the music licence.

In Mexico, ISRC code is delivered by AMPROFON, the representative of Mexico's Recorded Industry.

3.6 Recorded music industry actors

Majors are established in Mexico and they are leading the market. It is considered that they own three quarters of the market share. As a result, for a long period of time, most of the leading music in Mexico was international music, mostly coming from the USA, since the majors were focusing on international acts' development in Mexico. Indie record labels are developing themselves thanks to the rise of local consumption on DSPs.

A selection of Mexican independent labels:

- **Alternativa Representa** (various local and international acts) is a 360 record label also doing booking, PR, distribution and so on. <https://alternativarepresenta.com/>
- **Altafonte Mexico** – (various) the company is originally a music aggregator from Spain. It is also a record label.
- **Discos Intolerancia** – (various) <https://www.facebook.com/discosintolerancia/>
- **Finesse Records** – (latin american electronic music) <http://finesse.mx>
- **DaFuture** – (local and international music) <https://www.facebook.com/dafuture.mx/>
- **Electrique Music** – (international and Latin-American electronic music) <https://www.facebook.com/electriquemusic/>
- **Rock Juvenil** – (Mexican and Latin American artists rock) <https://www.facebook.com/rockjuvenilmx/>
- **Duro** – (electronic music from Latin-America) <https://durolabel.com/>
- **Movic Records** (Mexican rock) <https://movicstore.com>

¹⁹ <https://wipolex.wipo.int/es/text/289795>

²⁰ <https://wipolex.wipo.int/es/text/288579>

²¹ <https://wipolex.wipo.int/es/text/295477>

- **Lizos Music** (based in Mexico and the USA, dedicated to Regional Mexican Pop) <https://www.facebook.com/lizosmusic/>
- **Vástago Producciones** (local pop) <https://www.facebook.com/vastagomusic/>

3.6.2. Main record shops:

There are still some shops selling Cds and vinyls in Mexico:

- **Mixup**: twenty shops approx in CDMX and around. It also sells books and other cultural goods. <https://www.mixup.com.mx>
- **Gandhi**: shops in all the Mexican territory. It sells all kinds of cultural products and it has a partnership with Ticketmaster for ticket sales. <https://www.gandhi.com.mx/>
- **Sanborns**: shops selling cultural products and other types of products (perfumes, clothes and so on). They are located in several Mexican cities. They have a strong focus on regional and Mexican music. <https://www.sanborns.com.mx/>

3.6.3. Digital music aggregators

Most of the international aggregators are developed in Mexico: **Believe Digital, ONErpm, Altafonte, CD Baby, Cassette, Ingrooves Music Group, The Orchard, TuneCore LATAM, Ditto, ADA LATAM.**

Believe is one of the leading indie distributors in Mexico. Most of these aggregators have an office and a large team in Mexico. They offer distribution services but some of them also offer label services (PR and marketing services, etc.).

4. Live music industry

Key points

- Mexico has a strong live music scene for local and international artists. Mexicans go to concerts and venue infrastructures are very good in Mexico.
- The most important cities for live music are CDMX, Monterrey and Guadalajara.
- OCESA (now Live Nation) is leading the market in Mexico, owning a lot of venues and festivals, being a booking and artist management company as well. This fact has created for a while a complicated access for emerging artists outside of OCESA ecosystem to access venues. It is changing with new promoters and live companies.
- The festival scene is impressive; it is divided into two types of festivals: cultural and public festivals (mostly welcoming local artists) and private festivals (often welcoming international acts).
- In Mexico, artists' fees are negotiated in Dollars and it is highly recommended to do so. It is very important to work with promoters you can rely on in Mexico and who prove to have worked well for international artists tours or concert production in Mexico.

Mexico is known for having a strong live music scene for local and international artists. On the one hand, Mexico represents a good opportunity for international artists to continue a tour after being in the US. On the other hand, Mexico is often seen as a

strong opportunity for Latin American artists to try to get a foot in international leading markets afterwards (US, Canada, Europe). But more and more artists are also now going to Mexico for the Mexican market, because they already have an important audience there and because they see opportunities in this market. As a result, Mexico represents a good opportunity for European artists: there is a strong festival and venues network welcoming international artists and it can also open doors for the rest of the Latin American continent.

The professional live music sector is a rather new one in Mexico. Before 1990 it was hardly possible to organise live music events legally due to governmental restrictions regarding public gatherings of bigger crowds. Therefore it was initially local actors, who started working on establishing the sector and international actors started rather late to invest in the territory

The most important cities for live music are CDMX, Monterrey and Guadalajara. These are the cities offering the biggest number of concerts and festivals. There are two main festival seasons in Mexico, one from March until May and the other from September until November avoiding the rainier summer months. Famous beaches are also places where, during the summer season, artists are booked (Tulum, Cancun, Acapulco). The winter season welcomes concerts in venues, theatres, auditoriums and different kinds of places since Mexico presents a very good concert infrastructure. Tourist destinations such as Puerto Escondido, Tulum, Cancun, El Cabo, Playa del Carmon or Acapulco also sometimes hold festivals, some of them, like especially Tulum, being essential for the international electronic music scene and gaining similar status as Ibiza. The best period for a tour in Mexico is October, November.

To begin with Mexico, the main cities to reach are Mexico city, Guadalajara and Monterrey. Mexican tours are facilitated in the west and centre of the country with CDMX and Guadalajara being a 6 hour drive and many cities on the way having good infrastructure and strong music audiences where an artist can stop and play. Going to Monterrey takes much more time by road and is usually reached by plane. In the north and south of Mexico, the city infrastructures are less developed and the distances between cities are higher. There is still an audience for music in these areas even if tours are more complicated to settle there. In some areas, it is not recommended to travel by the roads because of the organised crime risks.

In Mexico, artists' fees are negotiated in Dollars and it is highly recommended to do so. But the tickets are sold in Mexican pesos and there are no public funds so the artists fees are often inferior to what one can expect in Europe or North America. Mexican promoters work a lot via mobile WhatsApp groups for booking (rather than emails), often together with several countries of LATAM to share artists costs.

4.1 Live music industry revenues

Mexico has an impressive live music market like no other in Latin America. There is no precise data about ticket sales revenues in Mexico but the last estimations from IQ International Ticketing Yearbook revealed that Mexico was the leader for live music in Latam, recently overtaking Brazil. Ticket sales have been increasing for the last fifteen years before the pandemic and the Mexican live market is part of the top 10 markets globally.

In terms of live ticket sales, the performance of the Mexican market and its strongest players is outstanding. The Pollstar charts are showing that several Mexican festivals, arenas and promoters are global leaders in terms of ticket sales.

Venues²²:

- ♦ Auditorio Nacional (Ranked 1 in 2019 | 73 in 2021) with 20 983 tickets sold in 2021 and 1 277 839 tickets sold in 2019
- ♦ Auditorio Telmex (Ranked 14 in 2019 | 52 in 2021) with 27 700 tickets sold in 2021 and 372 430 in 2021.
- ♦ Pepsi Center WTC (Ranked 54 in 2019 | 93 in 2021) ; Auditorio Pabellon M (Ranked 66 in 2019 | 24 in 2021),
- ♦ Teatro Diana (Ranked 84 in 2019 | 96 in 2021)

Arenas²³:

- ♦ Arena Monterrey (Ranked 5 in 2019 | 30 in 2021) with 104 497 tickets sold for \$2.5M in 2021
- ♦ Arena Ciudad de México (Ranked 7 in 2019 | 50 in 2021) with 75 761 tickets sold for \$1.5M in 2021

Stadiums²⁴:

- ♦ Autodromo Hermanos Rodriguez (Ranked 23 in 2019 | 33 in 2021) with 47 086 tickets sold in 2021 but 180 092 in 2019.
- ♦ Parque Fundidora (Ranked 24 in 2019 | 10 in 2021) with 120 530 tickets sold for \$8M

According to PWC forecast, 2022 will not generate the revenues of 2019 in tickets sales and sponsoring in the live music industry. What's more, even if live music sector will observe a strong growth the next years, it will reach its pre-pandemic level only in 2026²⁵.

The main ticketing companies are Ticketmaster (Live Nation), Superboletos (Avalanz group) which operate on the internet and as shops. Most of the tickets are sold on the Internet and via smartphones. Ticketing tax is 16%.

4.2 Consumption patterns and live music scenes

Mexicans are really open to a lot of genres of music and to international acts, more than in the rest of Latin America. They are consuming a lot of audio streaming music and having concerts in Mexico can easily increase the audience on audio platforms for international acts.

4.3 Venues and infrastructure

Venue infrastructure is considered in general very good in Mexico, above all in the biggest live cities. The venue network used to be mainly managed by OCESA and other very strong promoters. It used to be (and it remains) a very monopolistic market which made it complicated for the indie promoters to book their artists in venues or festivals. However, the last two decades brought new venues, opening doors to various promoters which allowed new acts to play in these venues. At the same time, local governments began to allocate new areas in the public spaces to create events

²² Worldwide Ticket Sales, Top 200 Theatre venues, Yearend 2019, Pollstar, December 2019
https://data.pollstar.com/chart/2019/12/121619Theatres_803.pdf

²³ Worldwide Ticket Sales, Top 200 Arena venues, Yearend 2019, Pollstar, December 2019.
https://data.pollstar.com/chart/2019/12/Top200Arenas_797.pdf

²⁴ Worldwide Ticket Sales, Top 200 Outdoor stadiums/sites, Yearend 2019, Pollstar, December 2019
https://data.pollstar.com/chart/2019/12/Top100StadiumOutdoor_800.pdf

²⁵ Global Entertainment & Media Outlook 2022–2026 Capítulo México, PWC, 2022. Online:
<https://www.pwc.com/mx/es/industrias/tmt/gemo.html>

and concerts. So Mexico has been experiencing in the last decades an opening and a diversification of live music programming.

There are a lot of venues in Mexico with good infrastructure. However, one can notice a gap between small venues from 100 to 500 and the ones from 2000 to 5000. There is another gap when it comes to venues with a superior capacity than that and the ones with a +15000 capacity (stadiums and Arenas). In other words, Mexico has a lot of small and very big capacity venues but very few middle capacity ones. However, the proliferation of independent music in Mexico helped the opening of new music spots with bars and venues of mid-size capacity. For example, in Monterrey there is the Café Iguana welcoming electronic, rock, reggae and ska, in Guadalajara C3 and Foro Independencia which are concert halls very important for emerging acts or Primer Piso Bar, important for Jazz music. In Mexico there are **Multiforo Alicia** welcoming national and international independent bands, **The Lunario**, operated by a trust fund has a 1000 capacity and opened to national and international artists, **The Roberto Cantoral Cultural Center**, a modern venue founded by SACM (Society of Authors and Composers of Mexico) and operated by a private company or the classic **Bulldog Café**, a more than twenty years venue for pop rock music.

A list of the biggest Mexican venues is available in the annexes of the report.

4.4 Promoters and booking agencies

In Mexico, most of the companies propose different activities combining management with booking, concert production and tour management and so on. Even if tours for international artists are often booked by US agents, there are some booking agencies in Mexico and Europeans can also work directly with promoters in Mexico.

It is nevertheless very important to work with promoters you can rely on in Mexico and who prove to have worked well for international artists tours or concert production in Mexico. The biggest Mexican promoters are usually also booking agencies and there are also independent booking agencies. Even if a tour can be done without a Mexican booking agency, it is recommended to find one to organise the travel, the visas, artists fee negotiation.

Two companies dominate a large part of the live music market in Mexico:

OCESA (now Live nation) was created in the 90s as a subsidiary in Mexico of Inter-american Entertainment Corporation (CIE), the leading company in the entertainment market in Central America. CIE was operating in relation with US companies and artists. OCESA produces concerts, theatre, sporting events and other cultural events. The company also manages several most prominent venues and festivals in Mexico: Teatro Metropolitan, Auditorio Nacional, Auditorio Coca Cola, Vive Latino festival and so on. The promoter has experienced exponential growth since its creation until the pandemic. It used to be the third biggest promoter in the world in 2019 after Live Nation and AEG with more than 4.6 million tickets sold and \$240M revenues²⁶. **Live nation acquired a 51% share of the company at the end of 2021 for \$416 million**²⁷.

Zignia is the second biggest entertainment company in Mexico. It was created in 2007 by Avalanz Group, a media and entertainment company also owning the ticketing company Supertickets. Zignia is operating very important venues such as Mexico City

²⁶ Worldwide Ticket Sales, Top 100 Promoters, Yearend 2019, Pollstar, December 2019.
https://data.pollstar.com/chart/2019/12/2019WorldwideTicketSalesTop100Promoters_796.pdf

²⁷ "Live Nation Buys 51% Stake In Ocesa, The World's Third Biggest Concert Promoter, For \$416m", Tim Ingham, December 6, 2021.
<https://www.musicbusinessworldwide.com/live-nation-buys-51-stake-in-ocesa-the-worlds-third-biggest-concert-promoter-for-416m2/>

Arena. It was ranked 9th biggest live music company in 2019 according to Pollstar with 2.3 million tickets sold in 2019 and \$56M revenues.

Even if these two companies have a strong hegemony in Mexico, other promoters are operating venues and festivals and booking international acts from all around the world. **ALIVE ENTERTAINMENT** in Monterrey, for example, presents electronic, alternative and live music events with internationally famous artists (for example, they operated David Guetta tours). **SHOW TIME** has been organising concerts for more than three decades in Mexico and collaborated with OCESA to organise international acts' concerts. **APODACA ARTISTIC REPRESENTATIONS** is a strong promoter, focusing on Mexican and regional music but operating the Pal Norte festival. **SICARIO GROUP**, responsible for the Ceremonia Festival and the Blackberry Auditorium, having grown for years now and operating an advertising company, Sicario TV blog and so on. **ECO**, a company that developed different type of activities (artist management, festivals, bar management in venues, branding, etc.) and which is the result of a merger of three agencies (Tape, [Sicario](#) and Marketen) is operating Ceremonia Festival, Tropic Festival, Sonar México and Radio Bosqué festival and also new types of cultural venues in CDMX like Sala or popular nightlife spot Bar Oriente.

4.5 Festival network

The festival network is highly developed in Mexico and there are very important festivals welcoming the biggest international acts of the world. As with the venues network, most of the festivals are owned by the top Mexican promoters. They are also mostly taking place in CDMX, Monterrey and Guadalajara. But more and more mid-sized festivals are appearing, operated by independent promoters. Most of them are taking place in the big cities but the growing interest of beer sponsors and other brand sponsors towards festivals allowed the creation of a lot of new festivals in smaller cities before the pandemic (Queretaro, Tijuana, Juarez, Puebla).

There are different types of festivals networks:

- the cultural and public festivals founded by the cities and local administration. These are almost never programming international acts. One needs to acknowledge that each state has its own festival and most municipalities as well, all publicly funded.
- the private festivals that are festivals sponsored by brands. A lot of them are open to international acts.
- the celebration parties: they welcome music and other cultural activities, drinks and foods and a place to dance.

The Mexican government estimates a total of 673 cultural public festivals in Mexico. Among them 135 are dedicated to music²⁸. These festivals are mostly located in Mexico city (131), Jalisco (41) and Michoacán (36). No data about ticket sales, audience and revenues are available for these festivals.

They are organised, booked and managed by the government. Each state has its "feria" annual events and each municipality has its own festival as well. They almost never book international acts. For example, *Bahidorá Carnival, a sustainability themed festival in Las Estacas, Morelos*, 3 hours from Mexico City, is usually held the second week of February. One of the most important city festivals is the *International Cervantino Festival* in Guanajuato, running since 1972. It is funded by the Secretariat of Culture and supported by the government of the state of Guanajuato, as well as the University of Guanajuato.

²⁸ https://sic.gob.mx/?table=festival&estado_id=0

Private festivals: they look like the European festivals with ticketing representing 40% approx. of the budget and sponsoring 40% as well. But they do not have money from the Mexican state. They depend on brands and it leads them to sometimes not being able to maintain a yearly edition. Some major festivals of Mexico are part of the Pollstar festival ticketing charts. For example, Pa'l Norte used to rank 7 before the pandemic with 131 584 tickets sold in 2019. In 2021, it sold **120 530 tickets**.

A lot of festivals are programming international artists.

In Mexico City: Vive Latino is one of the oldest festivals of Mexico programming local and international acts and with Corona Capital (which) is only programming international artists they are one of the biggest festivals of Mexico. They both tend to reach the size and fame of Lollapalooza or Coachella. EDC is programming international artists of electronic music (EDM) and is one of the biggest festivals in Mexico, Coca Cola Flow is a festival around urban music. All these festivals belong to OCESA/Live Nation. Next to these massive festivals, there are more indie, eclectic and smaller sized festivals: Marvin Festival which is taking place in diverse venues and spaces of the city, Hypnosis is a festival around psychedelic rock music, NRMAL, created by the Nrmal Collective, focus on offering very high-quality music and could be seen as an equivalent of Pitchfork Festival in Europe and MUTEK around visual digital arts and electronic music.

In Monterrey: Hellow Fest began as an independent event that brought fairly unknown bands to play in Monterrey and welcome international pop rock music. Tecate Live out is important for Latino and international artists and Tecate Pal Norte which is one of the biggest festivals in Mexico as well.

In Guadalajara: Corona Capital, Coordinada are two major festivals as well.

A list of the 50 biggest festivals is available in the annexes of the report.

4.6 Coronavirus impact

PWC forecast estimates a loss in ticketing revenues in Mexico in 2020 due to the pandemic. The lack of public funds for the private live music industry (which is the only part of the sector programming international acts) could have resulted in a disaster. However, according to a recent report conducted by some key players of the Mexican music industry²⁹ Mexico is experiencing a good recovery after the pandemic. Most of the major festivals and events were sold out in 2022 and the number of concerts is increasing with more and more diverse offerings from local music to international mainstream but also international non-mainstream and more niche music. However, the prices are also increasing. As a result, the early months in 2023 will be crucial for the Mexican live music market since the audience will have more (and maybe too much) concert options with higher prices of tickets. What's more, the report does not bring information about smaller or middle live events in Mexico.

5. Publishing

5.1 Copyright law

Author rights protection is part of the United States of Mexico constitution in article 73, paragraph XXV. As most of the Latin American countries, Mexico is part of the following international treaties and convention toward copyright protection:

- Inter-American Convention on the Rights of the Author in Literary, Scientific and Artistic Works, 1946³⁰
- Universal Copyright Convention 1952³¹
- Convention Establishing the World Intellectual Property Organization, 1967³²
- Berne Convention for the Protection of Literary and Artistic Works, 1971³³
- Agreement on Trade-Related Aspects of Intellectual Property Rights (TRIPS), 1994
- WIPO Copyright Treaty (WCT), 1996³⁴

The Federal Copyright Law (1996) is the main statutory law governing copyright and neighbouring rights. This copyright law follows European authors' rights logic more than US copyright law tradition. It created a Public Copyright Registry and every music work needs to be registered in **INDAUTOR**³⁵ to be protected. It recognizes moral rights. Two collective management organisations (CMOs) are operating the collection of music copyrights for authors, composers and publishers: SACM³⁶ (Mexico's Society of Authors and Composers) and SACM/EMMAC³⁷. These CMOs are non-profit organisations authorised by the Mexican copyright law and INDAUTOR.

Type of collection rights:

- public performance: live music, bar, restaurants, shops, public spaces and so on (SACM)
- mechanical rights: recordings (SACM)
- digital rights (EMMAC)

There is no private copying levy in Mexico.

SACM is part of CISAC, OMPI and BIEM. It is allocating the ISWC to the music works in Mexico. However, it is not part of Latinautor which is a federation of collection societies for online collection since EMMAC Mexico has its own infrastructure to collect digital rights. To know more about the licence fees:

- EMMAC list of licences and fees:
<http://www.emmacsacm.com.mx/EMMAC/Index>
- SACM index:
<https://www.sacm.org.mx/Home/Docs?p1=Cuotas&p2=Tarifario2017.pdf>

³⁰ <https://wipolex.wipo.int/es/text/215229>

³¹ <https://wipolex.wipo.int/es/text/172836>

³² <https://wipolex.wipo.int/es/text/283833>

³³ <https://wipolex.wipo.int/en/text/283693>

³⁴ <https://wipolex.wipo.int/es/text/295157>

³⁵ <http://www.indautor.gob.mx/>

³⁶ <https://www.sacm.org.mx>

³⁷ <http://www.emmacsacm.com.mx/EMMAC/Index>

5.2 Collective management in figures

According to the 2021 CISAC report, Mexico has the second biggest rights collection in Latin America, right after Brazil. In 2021, the Latam region observed a 2.1% decrease of music collection rights. It was the only region observing a decrease in this period³⁸. But in 2021, the Mexican collections grew up (+9.6%) in comparison to 2020 and contributed to more than one-quarter of the region's revenues. Music collections in Mexico are led by digital rights representing one-third of the revenue. Then, as concerts reopened in 2021, a growth was visible in public performances.

5.3 Synchronisation

The Mexican market offers a lot of opportunities for advertising and film synchronisation. On the one hand it is the leader in Latin America in terms of advertising revenues³⁹ and on another hand it presents a local film industry and a strong development of OTT services⁴⁰. Furthermore, the musical openness of the Mexicans allows a wide range of music genres to be synchronised. Of course, music with Spanish lyrics represents the strongest share of synchronisation but music with lyrics in English comes next and there is still a room for other languages, above all French, Portuguese and Italian.

There are more and more music supervisors in Mexico and the sync activities are being more and more professionalised (film production being more aware of the necessity to think early about the music and the budget allocated to it in a movie). Nevertheless, the budgets are often lower than one can expect and it can be an issue for European professionals and artists.

The growing market of production leads the market to have open doors for any type of music. Music supervisors are curious about discovering new music from all around the world, even “niche” music. Some of the campaigns can begin in Mexico and then extend to the rest of Latam as well⁴¹.

It can still be a good opportunity to get a foot in the door of the Mexican market. This issue has been reinforced by the recent increase of film production costs linked to sanitary constraints (linked to Covid) and the global economy slowing down. It affects the budget available for music in the productions. To get in touch with music supervisors, a short email and the playlists of your catalogue are enough⁴².

38 Global Collections Report 2021, CISAC, 2022.

39 https://www.ift.org.mx/sites/default/files/contenidogeneral/estadisticas/anuarioestadistico2021_1.pdf

40 Global Entertainment & Media Outlook 2022–2026 Capítulo México, PWC, 2022. Online: <https://www.pwc.com/mx/es/industrias/tmt/gemo.html>

41 El Reporte Música México, Industria 2022, Amprofon, Fimpro, Relatable, Casete, Universidad de Guadalajara.

42 LATAM Ya! How to click with LATAM: Getting to Grips with Sync, Centre national de la musique, 2020. Online video: <https://youtu.be/0P3AFO2CkWk>

6. Media

Key points:

- Radio is still strong in Mexico but it is almost only opened to majors-signed artists
- Social networks have proved to be an important way to develop artists in Mexico, with short videos format being very significant.
- Music press is very dynamic in Mexico.
- As a result, having a good PR and marketing strategy in Mexico often brings very good results. This strategy needs to begin 6 months before a tour.

Mexico is a powerful media country with a wide media landscape from Radio to music blogs. It is considered as the biggest media market of Spanish speaking countries in Latam. Having a presence in the most popular media and communication outlet is necessary to make a strong entrance to the Mexican music market.

6.1 Social media

Name of the social Media	Available in the country?	Amount of users (Million)	Share of the population in the age of being an user (+13 – 2022)
Facebook	YES	89,70	88%
Instagram	YES	37,85	37%
Twitter	YES	13,90	14%
Snapchat	YES	16,95	16%
Twitch	YES	-	-
TikTok	YES	46,02	50%*
LinkedIn	YES	17,00	19%
Facebook messenger	YES	61,8	60%
Whatsapp	YES	-	-

Figure 5. Social media platforms in Mexico⁴³

* The percentage of population for TikTok is based on the +18 users.

There were **102.5 million** social media users in Mexico in January 2022, which represents 78.5% of the overall population and a 2.5% yearly growth in comparison to 2021. These users are mainly young with more than 50% of them being between 18 and 34 years old⁴⁴.

These users spend an average of 3h20 minutes per day on social media (it decreased in comparison to 2021). Kepios analysis also reveals that social media users in Mexico increased by 3 million (+2.5 percent) between 2021 and 2022 which shows that the market is now mature but with slow growth in terms of number of users. The average

⁴³ Digital 2021, Kepios, Hootsuite and We are Social, 2022

⁴⁴ Digital 2021, Kepios, Hootsuite and We are Social, 2022

number of social platforms used each month reach 7.0. The Internet users favoured WhatsApp (94.3% using this app every month), Facebook (93.4% using it every month), Facebook messenger (80.5%) and Instagram (76.5% using it every month).

Mexicans also spend a large average time on these platforms: 20 hours per month on WhatsApp, 26.2 hours on Facebook and 23.4 hours on TikTok.

Focus on WhatsApp:

If you go to Mexico or work with Mexican professionals, you need to download WhatsApp. This messaging and live chat app is used by most Mexicans for connecting with friends, family but also for professional use by texting, sending vocal messages or calling. Most professionals use it to communicate through “stories” or messages about upcoming tours, shows or albums. Most of them also easily give their WhatsApp number to communicate as per email about conditions, fees and sometimes even send contacts via WhatsApp.

More than anywhere in the world, Mexicans really engage with artists. They listen and share a lot of music and social media is the second way to discover music for Mexican music lovers after the music platforms and friends’ word of mouth. Shazam is also a strongly used app to discover new music in the public space.

Mexican social media users followed the global trends by making more and more interest on the content created by users themselves and the content created by artists to build a “fan-artist” relationship. In the same way, short videos became very efficient for music discovery and a prominent social media format to communicate.

The lockdown also helped develop live streaming on Twitch, YouTube Live, Bandsin-Town, Vimeo Livestream and so on and new paying live streaming platforms have been emerging as well as live streaming events. For example, **ReventonLive** is a virtual festival celebrating Latin music.

As a result, marketing and digital promotion in Mexico can rely on campaign-focusing platforms or social networks of all sorts: from WhatsApp to Spotify, from Instagram influencers to sync from TikTok user-generated challenges, from Twitch to YouTube partnership. Having Mexico as a goal for an international artist’s career development abroad often provides good results if a long-term strategy is built with some local PR and marketing agencies. However, artists’ data are important in Mexico, which means that the artists often need to be established in his/her country or in Europe before being able to correctly enter the Mexican market and have the Mexican professional’s attention.

6.2 Radio

In Mexico, half of the households possess radio equipment according to the Federal telecommunication institute of Mexico. In 2020, there were 2,984 radio stations in Mexico, among them, 397 were AM radio and 1,728 FM radio. There were 1 115 commercial FM radio stations and 282 public ones. Mexico is considered as one of the biggest advertising markets in Latin america⁴⁵.

There are approximately 400 companies operating radio stations in Mexico but only a handful are reaching the strongest audiences: Radiorama, RadioCentro, GTV, Grupo

45 https://www.ift.org.mx/sites/default/files/contenidogeneral/estadisticas/anuarioestadistico2021_1.pdf

MVS, Grupo Formula, Grupo Acir, Radio Mil, Multimédios. According to a Nielsen IBOPE report, the time spent by Mexican people listening radio reached 3 hours per day pre-Covid and increased a little during the pandemic period⁴⁶. News and music are the favourite types of programs.

Most of the broadcast is concentrated on Mexican music (more than half) and then music from US, UK and other Spanish countries. Still, radio is one of the important ways to promote international music in Mexico. It is a very important medium to break an artist nationwide. Some radios are easily reachable but in order to work on this media a good PR is necessary. These PRs are able to guide your project through commercial but also university and community radios⁴⁷. There are also a lot of local and regional radio stations in Mexico.

6.3 Television

In Mexico, 29% of households possess analog television equipment and 44% a digital TV according to the Federal telecommunication institute of Mexico. Over the 885 available TV channels, 607 are commercial ones, 257 are public channels and 21 are social channels. Most of the commercial channels belong to Grupo Televisa, TV Azteca and Grupo Imagen. The market is very concentrated around these players⁴⁸. According to the Mexican Federal telecommunication, public television reaches more than 90% of the population possessing a television and less than 15% of the Mexican people are paying for subscription channels.

6.4 Magazines and webzines

Mexico is one of the Latin American countries accounting for the biggest number of music-specialised media. Most of them are online. Among the most important music websites:

- Sopitas (<https://www.sopitas.com/musica/page/2/>) : this is dedicated to general news but has a strong focus on music and international acts. It was created in 2008 and its Facebook account has 2 million followers.
- Marvin (<https://marvin.com.mx>) which is also available in a print format is a music and culture magazine focusing on national and international acts of pop, rock and electronic music. Marvin is also a festival in CDMX.
- Indie Rock ! is a website specialised in music art and culture following the trends of Mexican and international music indie scene.

⁴⁶ <https://www.nielsenibopecom/2020/07/13/consumo-de-tv-y-radio-en-contingencia/>

⁴⁷ Fiche Mexique : Promotion & marketing, Centre national de la musique, mai 2021.

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ANNEX 1 – Main Mexican venues (by size)

City	Name	Capacity	Genre
Mexico	Arena Ciudad de Mexico	22 300 seats	All popular music
	Auditorio Nacional	10 000 seats	All popular music
	Sala Nezahualcoyotl	2 230 seats	Classical music
Puebla	Acropolis Puebla	10 230 seats	All popular music
Guadalajara	Auditorio Telmex	9 000 seats	All popular music
Monterrey	Arena Monterrey	17 600 seats	All popular music
San Luis de Potosi	El Domo	11 000 seats	All popular music
Merida	Foro GNP Seguros	9 500 seats	All popular music
Acapulco	Forum de Mundo Imperial	4 000 seats	All popular music
Orizaba	Auditorio Metropolitano	4 000 seats	All popular music and classical music

ANNEX 2 – 50 main Mexican festivals

Name	Period	City	Description	Website
Carnaval de Bahidora	February	Tlaltizapán	Pop, rock, electro	http://bahidora.com/es
Roxy Fest	February	Guadalajara	Rock, jazz, alternatif	https://festivalroxygdl.com/
Festival Adverso	February	Guadalajara	Indie	https://www.festivaladverso.com/
EDC	February	Mexico DF	Électronique	https://mexico.electricdaisycarnival.com/en/
Tecate Pa'l Norte	March	Monterrey	Indie/rock	https://www.palnorte.com.mx
Bravo Festival	March	Valle de Bravo	Varié/electro	http://www.bravognp.com/
Festival Vaiven	March	Cuernavaca	EDM	https://festivalvaiven.com/
NRML	March	Mexico	Varié	http://festivalnrmal.net
Ecoparque Fest	March	Salamanca	Varié	https://www.ecoparquefest.com/
Rock X la Vida	March	Guadalajara	Rock	https://www.facebook.com/rockporlavid/
Festival Vive Latino	March	Mexico	Varié	https://www.vivelatino.com.mx/

Name	Period	City	Description	Website
Cumbre Tajin	March	El Tajín	Varié	http://cumbretajin.com
Jazztival Michoacan	April	Morelia	Jazz	www.jazztivalmichoacan.org
Beyond Wonderland	April	Monterrey	EDM	https://mexico.beyondwonderland.com/
Festival Videosonora	April	Cuernavaca	Video / musique	https://www.facebook.com/videosonora/
Festival Akamba	April	Tequila	Electro By Distrito Global	https://www.akamba.mx/
Festival Rock x La Vida	April	Guadalajara	Indie/Rock	https://www.facebook.com/rockporlavida/
Ceremonia GNP	April	Toluca	Varié	https://www.facebook.com/festivalceremonia/
Tecate Supremo	April	Cd Juarez	Varié/ Mainstream	https://www.tecatesupremo.com/
Feria Nacional de San Marcos	April/May	Aguas Calientes	Varié	www.feriadesanmarcos.gob.mx/
Tecate Location	May	Cancun	Varié/ Mainstream	https://tecatelocation.com/
Tecate Location	May	Tuxtla Gutierrez	Varié/ Mainstream	https://tecatelocation.com/
Tecate Location	May	Veracruz	Varié/ Mainstream	https://tecatelocation.com/
Festival Internacional Volare	May	Orizaba	Indie/Varié	https://festivalinternacionalvolare.com/
Festival Pulso GNP	May	Tequesqui-tengo	Varié	https://www.pulsognp.com.mx/
Festival del Viento	May	Pachuca	Varié	https://www.festivaldelviento.mx/
Festival LTDO	May	Queretaro	Rock/Indie	
Festival Marvin	May/June	CDMX	Indie/Varié	https://www.facebook.com/festivalmarvin/
Cosquin Rock Mexico	June	Guadalajara	Rock	https://www.facebook.com/CosquinRockMx/
Machaca Fest	June	Monterrey	latino	http://www.machaca.mx/
Festival Internacional de Jazz	June	Córdoba	Jazz, World	N/R
Festival Zapal	July	Saltillo	Varié/ Mainstream	https://www.zapal.mx/
Boderland	July	Cd Juarez	Varie/indie	http://www.festivalborderland.com/
Bud Light Hellow Festival	August	Monterrey	varié	https://hellowfestival.com/
Sin Fronteras	August	Cd Juarez	Varie/indie	https://www.facebook.com/festivalsinfronterasjuarez/
Tecate Panorama	August	Orizaba	Indie	

Name	Period	City	Description	Website
Atypical Fest	August	Monterrey	Rock/Indie	https://www.facebook.com/atypicalfest/
Jalisco Jazz Festival	September	Guadalajara	Jazz, RnB, blues, etc. Gilberto Cervantes	http://jaliscojazzfestival.com/
Phono-cinema	September	CDMX	Festival cine + musique	http://www.phonocinema.com/
Festival Machaca	September	Monterrey	Mainstream	https://www.machaca.mx/
Tecate Península	October	Tijuana	Varié (focus latam)	https://www.tecatepeninsula.com/
Tecate Arcadia	October	Merida	Indie	https://tecatearcadia.com/
Tecate Comuna	October	Puebla	Indie	https://www.tecatecomuna.com/
Tecate Republica	October	Chihuahua	Indie	https://tecaterepublica.com/
Encabritados	October	Monterrey	Varié	https://www.encabritados.mx/
Festival Ruido Aberrante	October	Guadalajara	Rock et dérivé	https://www.facebook.com/FestivalRuidoAberrante/
Festival Revueltas	October	Durango	Varié	http://festivalrevueltas.mx/
Festival Internacional de Arte y Cultura Quimera	October	Metepec	Festival multidisciplinaire	https://www.facebook.com/FestivalInternacionalQuimera/
Festival Cervantino	October	Guanajuato	Varié, festival très institutionnel	https://festivalcervantino.gob.mx/
Entijuanarte Festival Cultural	October	Tijuana	Varié	https://www.fundacionentijuanarte.org/
Sonar Mexico	October	CDMX	Electro/Techno	https://sonarmexico.com/
Festival Tecate Coordinada	October	Guadalajara	Varié	https://tecatecoordinadagdl.com.mx
October Fest	October	Monterrey	Rock/indie	https://www.facebook.com/OktoberfestMX/
Knot Fest	October / November	CDMX	Metal	https://www.facebook.com/knotfestmexico/
Festival 212	November	Guadalajara	Varié	N/R
Corona Capital	November	Mexico DF	Varié/indie	https://www.coronacapital.com.mx/
Tecate Sonoro	November	Hermosillo	Varié	https://www.tecatesonoro.com.mx/
Festival Tecate Bajío	November	León	Varié	https://tecatebajio.com/
Festival Area 43	November	Tamazula de Gordiano	Rock, Punk, underground, metal	https://www.facebook.com/festivalarea43/

Name	Period	City	Description	Website
Corona Northside	November	Monterrey	Metal/Rock	http://www.northsidemty.com/
Hell & Heaven	November March	CDMX	Metal	https://hellandheavenfest.com/
Mexico Metal Fest	November	CDMX	Metal	https://mxmf.com.mx/
Festival Catrina	December	Puebla	Pop, rock, alternatif	http://www.catrinafestival.mx
Festival Tropicico	December	Acapulco	Electro	https://tropicomx.com/
ForceFest	December	CDMX	Metal	https://forcemetalfest.com/
Festival Internacional Trova	N/R	Mérida	Jazz, world, folk	http://www.festivalinternacionaltrova.com
Indie Fest	N/R	Campeche	Varié	https://indiefest.lacaverna.net/

ANNEX 3 – List of people interviewed for the report

Sergio Arbelaez (**FIMPRO**)

Paco Arriagada (**Casete / Topica**)

Clemente Pina Cabello (**AMPROFON**)

Patricia Carrera (**Control Freaks**)

Frederico Crespo (**Japan Club**)

Malfi Dorantes (**Malfico**)

Cynthia Flores (**Foro Indie Rocks**)

Guillermo González King (**AMPROFON**)

Mariela Martínez (**Producer**)

Hector Mijangos (**Noise Lab**)

Fabrizio Onetto (**OCESA Seitrack**)

Felipe Perez Santiago (**Composer**)

Damián Romero (**MUTEK Mexico**)

Gerry Rosado (**Relatable**)

Ulises Sanher (**Equal Media**)

José Luis Sedano (**Managers Anónimos**)

Michael Spanu (**UNAM**)

Luis Trejo (**Goethe-Institut Mexiko**)

Cecilia Velasco (**Marvin Festival**)

