



# Music

## Music in China at a glance

China's music industry is large, fast-evolving, and increasingly diverse. In recorded music, China became the world's fifth largest market in 2023, driven by a sharp increase in paying users on platforms like Tencent Music and NetEase Cloud. Meanwhile, the live sector is booming post-pandemic, with over 36 million people attending large-scale concerts and festivals in 2024. From orchestral tours to underground bands, China now offers both scale and segmentation—where digital and physical, classical and contemporary, commercial and experimental coexist.

The dominance of streaming and short video platforms is reshaping how music is produced, distributed and consumed. But beyond algorithms and online fandoms, there is a growing appetite for authenticity, co-creation and cultural connection. Musicians are increasingly collaborating across genres and cultures, and local governments are backing music events as part of tourism and soft power strategies.

- **£1.07 billion** (\$1.45 billion): Recorded music revenue in 2023 (5th largest globally, +25.9% YoY)
- **36.5 million**: Attendees at large-scale music events in 2024
- **788.57 million**: Attendees at small and mid-sized concerts in 2023
- **726 million**: Online music users in 2023

### Opportunities for UK partners

Compared with other art forms, music crosses borders with emotional immediacy and relatively low regulatory risk, making it one of the most open and dynamic sectors for cultural exchange with China. While the commercial landscape is competitive and platform-dominated, the appetite for learning, residencies, and hybrid musical experiences is growing—especially in second-tier cities.

- **Explore the middle scale**: for SME UK partners, China's music scene offers far more than stadium tours. Collaborate with local music agencies to access local live houses, conservatoires, and midsize festivals for meaningful audience engagement and development.
- **Bridge traditions with innovation**: There is untapped space for pairing Western genres with Chinese instruments. UK-China collaborations can nurture new sonic languages while supporting underrepresented traditions.
- **Leverage China's hybrid digital-physical formats**: Live-streamed concerts, virtual fan interactions, and direct artist tipping are integral to how Chinese audiences engage. UK artists and labels can experiment with these hybrid engagement models—not just to reach audiences, but to learn from them.

## Market development timeline

### 1990s

#### Cassette and CD Era Emergence and Exploration

A boom in Mandarin pop and Cantonese pop with the southern region led to the commercialisation of pop music. Chinese Rock appeared under the global music influence. Early music festivals appeared.

- 1991** Tang Dynasty's first album.
- 1993** Beijing Music Radio was founded.
- 1993** Beijing Midi School of Music was founded.
- 1994** Hong Kong Coliseum - Rock China Power Concert.
- 1995** Beginning of Beijing's underground bar scene.
- 1997** Modern Sky was founded.
- 1997** The 1st Midi Music Festival took place.
- 1998** The 1st Beijing International Music Festival took place.

### 2000s

#### MP3 and Internet Music Era Digitalisation, Commercialisation and Emerging Talent Show

Portable music devices appeared, and so did the internet and downloadable music, online albums and MP3s. Both mainstream and underground music flourished.

- 2000** Pianist Lang Lang became the 1st Chinese winner of the Chopin Competition, inspired millions of young Chinese to take up piano.
- 2000** China Philharmonic Orchestra was formed based on the previous China Broadcasting Symphony Orchestra.
- 2001** 90% of audio-visual content not copyrighted.
- 2002** Baidu MP3 search launched.
- 2004** Kugou Music launched.
- 2004** TV talent show 'Super Girl' gave rise to nationwide pop superstar Li Yuchun in 2005.
- 2004** The Royal Philharmonic Orchestra first visited China.
- 2005** QQ Music launched 2005 "The first year of digital music", as digital music sales surpassed physical sales.
- 2008** Xiami Music launched.
- 2007** The first Modern Sky Festival in Beijing launched.
- 2007** Mao Livehouse opened in Beijing.
- 2009** Strawberry Music Festival year 1.

## 2010s

### Streaming and Music Talent Show Algorithms and Entertainment

With 5G and unlimited data, music streaming became available. The way music is consumed has completely shifted and become embedded in digital platforms and social media. Music recommendations shifted towards algorithms. Driven by long-form video platforms iQiyi, Rap and Rock and Roll became popular through music talent shows. Music from here became increasingly entertainment-oriented.

- 2013** NetEase Cloud Music launched.
- 2015** QQ Music launched digital album sales.
- 2015** The strictest music copyright regulation launched. 2.2M songs were pulled offline.
- 2012-2017** Exclusive music copyright war among platforms lasted for almost 6 years.
- 2018** QQ Music, NetEast Music and Ali Music reached an agreement to share copyrighted music, putting the war to an end.
- 2017** iQiyi The Rap of China Season 1.
- 2018** iQiyi The Rap of China Season 2.
- 2019** iQiyi The Big Band Season 1.

## 2020s

### Online Live Concert Audio-visual Production

The format of online concerts became popular during the pandemic. With ultra HD digital technology, technology allows music to transcend time and space. These productions were staged offline and streamed not just on music platforms but also social media and video platforms. Music platforms hold increasing power in deciding exposure and recommendations. The grassroots area gave way to one dominated by commercial value and online traffic.

- 2020** Tencent TME Live launched.
- 2020** NetEase Cloud Live launched.
- 2021** Xiami Music closed down.
- 2021** China as 6th largest recorded music market.
- 2022** China as 5th largest recorded music market.
- 2020** iQiyi The Big Band Season 2.
- 2023** iQiyi The Big Band Season 3.
- 2023** Royal Philharmonic Orchestra signed a new MOU with the National Centre for the Performing Arts (NCPA), Beijing.
- 2024** Royal Philharmonic Orchestra returned for a China tour after COVID-19 pandemic with concerts in Beijing, Shanghai, Xiamen, Changsha, Wuhan and Nanjing.

## Market overview

China's music sector is rapidly expanding—digitally dominant, demographically young, and shaped by shifting consumption patterns. Streaming platforms and live music now form twin pillars of the market, while orchestral and classical music remain influential due to decades of investment in education and infrastructure. Digital platforms continue to redefine exposure, while live music attendance has rebounded strongly post-pandemic, with both mega-concerts and grassroots gigs drawing large audiences.

### Market size

- **Recorded music:** China was the world's 5th largest recorded music market in 2023, with revenues of **£1.07 billion** (\$1.45 billion), up 25.9% year-on-year—the fastest growth among the top 10 global markets (IFPI). This marks a historic leap from 19th place in 2014.
- **Paying users:** Tencent Music alone had **121 million paying users** by late 2024 (up 13.4% year-on-year). However, per capita spend of ¥11.1 (£1.17, up 3.7% year-on-year) remains low compared to Western markets, suggesting substantial room for growth as paid models gain traction.
- **Large scale live events:** In 2024, large concerts and festivals (>5000 capacity) generated £3 billion (¥29.6 billion, up 48% from 2023), with 36.5 million attendees (up 3% from 2023) across 2,700 shows<sup>70</sup>.
- **Small and mid-size concerts:** In 2023, small and medium music concerts (<5000 capacity) generated £2.2 billion (¥21.82 billion), with 788.57 million attendees across 28,000 shows<sup>71</sup>.

### Market segment

- **Online streaming:** China's digital music landscape is dominated by Tencent Music (operating QQ Music, Kugou, Kuwo, and karaoke app WeSing) and NetEase Cloud Music. Unlike Western streaming platforms, these platforms combine streaming with social media, fan interaction, live performance tipping, and user-generated content. In 2023, the number of online music users reached **726 million**<sup>72</sup>.
- **Live music:** Live music in China has grown from an embryonic scene in the 1980s to a major industry segment today. Every sizable city and province in China now hosts music events. Chains like MAO Livehouse spread to half a dozen cities. Local governments increasingly back music events and festivals to boost tourism and the night-time economy.
- **Classical and orchestral music:** Professional orchestras have grown from under 20 in the early 2000s to over 80 in 2023<sup>73</sup>. Compared with other art forms, music education in China is extensive, highly valued by families, and supported by government policy. Tens of millions of children learn instruments, especially piano and violin. Every major city has a conservatory or music college that not only trains Western classical but also traditional Chinese music forms.
- **Online concert streaming** popularised during the pandemic. Platforms like Tencent's TME Live platform offer high-quality virtual concerts by Chinese and Western artists for Chinese audiences, a format likely to continue as a hybrid model.



## Key trends and opportunities

This section distils insights from in-depth conversations with Chinese and UK music professionals. These interviews reveal four trends that reflect current trends and opportunities for UK stakeholders where mutual value, skill-sharing and long-term trust are prioritised.

### 1. Music as a bridge connecting cultures beyond words

Music serves as a uniquely effective cultural bridge because it communicates emotion directly, without relying on language. With instrumental works and cross-cultural compositions generally navigating linguistic and political boundaries more easily, it is more accessible than many other art forms. Many contemporary music styles (from classical to rock to electronic) have global reach, offering a shared framework that can be collaborated on locally. Western classical repertoire is widely respected in China, and there is a growing appetite for hybrid sounds that blend genres and cultures.

**Opportunities:** UK musicians and institutions can use music's emotional immediacy and low language barrier to create powerful shared experiences with Chinese audiences and collaborators. Projects grounded in universal themes such as joy, place, memory, identity can resonate with audiences cross-culturally more easily.

### 2. World-class infrastructure awaits sector development

China boasts impressive hardware infrastructure - concert halls, stadiums, orchestras, conservatories - but lacks the soft infrastructure that supports sector development. It also means Chinese musicians may have fewer opportunities to engage in the global music industry beyond education, despite world-class training.

Unlike the UK where music boards, trade bodies, and regular conferences offer policy and community forums, China lacks formal cross-sector music convenings. Musicians often operate in fragmented or informal networks. UK musicians entering China may struggle with logistics, permissions, and planning without the right local partners.

**Opportunities:** UK organisations experienced in sector development—especially those with track records in cultural relations—can play a valuable bridging role. This may include co-developing showcases, hosting joint producer dialogues, supporting Chinese artists' industry access, or offering logistical frameworks for bilateral tours.

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**You can absolutely provoke with music—but you need to try very hard.**

—Sid Peacock, composer and artistic director, Surge Forward Music & Arts

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**The world-class facilities are there. But how do you build world-class collaborations?**

—Andrew Lansley, Innovation Manager, Cheltenham Festivals



### 3. Start small: begin with people

Many successful sustained UK-China music collaborations often started with exploratory, low-pressure engagements, rather than straightaway high-stakes touring or formal exchanges. Careful and low-stakes collaborations allow both sides to test technological, artistic, legal and interpersonal alignments without risking reputation or over-promising. Collaborative projects that allow both parties to exchange ideas in low-stakes environments create safer spaces for risk-free experimentation. From a cultural relations perspective, this process of mutual listening and adaptation is a strength, not a delay. When successful, it lays the groundwork for deeper, more formal cooperation.

**Opportunities:** Begin with people, not projects. Focus on modest, open-ended engagements such as studio visits, online dialogues and rehearsal exchanges that allow ideas to emerge naturally. This trust-first approach doesn't delay impact—it lays the foundation for more durable, reciprocal partnerships.

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**We need low-risk, non-commercial ways to build trust before we talk about outcomes.**

—**Andrew Lansley**, Innovation Manager, Cheltenham Festivals

**Both parties have to feel they're equal contributors and that's worth their while. They have to feel they both learned and grown, and their contribution has been relative, not just fitting into somebody else's.**

—**Sid Peacock**, composer and artistic director, Surge Forward Music & Arts



#### 4. Untapped potential: Western genres meet Chinese instruments

There is growing interest—both in China and the UK—in fusing Western music forms (e.g. jazz, classical, experimental) with Chinese traditional instruments. Yet the UK lacks formal structures (e.g. music schools, community programmes) to support this kind of creative hybridisation.

Unlike other diaspora communities, Chinese musical traditions in the UK remain underrepresented in public education and community programming. There are relatively few places where people—Chinese or otherwise—can learn to play Chinese instruments or engage with traditional repertoire. In China, by contrast, musicians trained in both classical and traditional forms are increasingly open to fusing styles. These musicians often bring deep knowledge of performance and strong technical skills, making them ideal collaborators.

Residencies can be a great way to provide an immersive, low-pressure setting for skill exchange and genuine relationship-building. Second- and third-tier cities in China like Chengdu and Chongqing - less saturated and more open to experimentation - are especially fertile ground.

**Opportunities:** There is a significant opportunity to develop fusion-based learning and co-creation. UK music educators, producers, and institutions could pilot programmes pairing British musicians with Chinese instrumentalists, or establish youth-focused ensembles that blend traditions. These projects can begin modestly as creative workshops or longer-term residencies and evolve into new forms of musical expression with global resonance. Creating opportunities for UK early-career musicians to work and learn for an extended period of time can yield deep mutual understanding and lead to sustained collaborations. Equally, creating space for Chinese musicians to work in the UK (beyond formal study) could strengthen sector links and increase diversity in British music.

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**For the UK, the commercial narrative of accessing 1.4 billion audience often seems to dominate that of the creative. There is less desire to share Chinese music culture - Western genre x Chinese folk instrument has huge untold mutual benefits.**

—Andrew Lansley, Innovation Manager, Cheltenham Festivals

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**West-meets-East fusion is still rare—but deeply powerful when it happens.**

—Musician in Chengdu, China

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**You have many Indian, Irish music schools in the UK teaching traditional music. You'll find jazz, African drumming, but I don't think there's an established Chinese instrument programme.**

—Sid Peacock, composer and artistic director, Surge Forward Music & Arts



## Case studies

In this section we showcase a mini typology of UK-China collaborations in music in the past few years. From strategic orchestral partnerships to indie music tours, they demonstrate the diverse formats, partners, and long-term value that music collaboration can generate rooted in mutuality. These models are not mutually exclusive, many successful collaborations combine elements of several.



### 5-year strategic partnership

#### Royal Philharmonic Orchestra x Beijing Poly Theatre Management<sup>74</sup>

The partnership was designed to widen access to great orchestral music across China. Since 2004, Royal Philharmonic Orchestra (RPO) has made a few China tours, with the most recent one<sup>75</sup> in 2024 supported by Armstrong International Music & Arts<sup>76</sup>. The 2024 tour delivered concerts and workshops in Beijing, Shanghai, Shenzhen, Xiamen, Changsha, Wuhan and Nanjing, deepening cultural ties<sup>77</sup>.

In 2023, RPO also signed a new MOU with National Centre for the Performing Arts (NCPA), Beijing, deepened institutional exchange through collaborative concerts and staff placements. (Image © Royal Philharmonic Orchestra)



#### Royal Scottish National Orchestra's New Year China Tours<sup>78</sup>

- 2012/13 - Beijing, Shenzhen, Guangzhou, Tianjin and Macau
- 2018/19 - Nanning, Zhuhai, Shenzhen, Linyi, Jinan, Beijing<sup>79</sup>
- 2024/25 - Shenzhen, Nanjing, Nanchang, Beijing, and Hangzhou

Royal Scottish National Orchestra's regular China tours reflect strong demand for British classical music. Each tour involved performances in major cities, soft power support from UK and Chinese stakeholders, and cultural exchange with alumni networks, local businesses, and Chinese audiences. (Image © Royal Scottish National Orchestra)



#### Trinity Boys Choir's China tours

- 2016 - Shanghai International Arts Festival
- 2018 - Guangzhou, Changsha, Wuhan, Zhuhai, Beijing
- 2024 - Shenzhen, Changsha, Wuhan, Shanghai, Suzhou, Xiamen, Chengdu, Xi'an, Shenyang, Beijing

The choir gave six concerts in their first tour in China in 2016 and undertook a major 10-concert tour of China in 2018<sup>80</sup>, and returned again in August 2024<sup>81</sup>. David Swinson, the Choir Director at the time, hoped that the Chinese and British people could build a bridge of friendship through their musical performances<sup>82</sup>.

### Shenzhen Symphony Orchestra's UK Tour

Chinese orchestras also increasingly tour the UK. For example, the China Philharmonic and Shanghai Symphony have performed at the BBC Proms and in British concert halls. In March 2024, Shenzhen Symphony Orchestra made their debut 8-venue UK tour, including London, Birmingham, Manchester, Edinburgh, Sheffield, Perth and Basingstoke. This tour was sponsored by Shenzhen Zhenxing Symphony Development Foundation, a state-owned charity<sup>83</sup>, and organised by Armstrong International Music & Arts Enterprises Ltd. (Image © eyeshenzhen)



### Label co-development and promotion exchange

- Modern Sky x Liverpool Sound City, 2016 - ongoing
- Modern Sky x ATC Group, 2024 - ongoing

China's largest independent music company, Modern Sky, launched Modern Sky UK in partnership with Liverpool Sound City to give Chinese artists access to UK audiences and let emerging UK acts tap into China's growing live circuit.

For example, UK acts like Red Rum Club and The Blinders gained label support and performance slots at Chinese festivals, and Chinese bands like Re-TROs got to tour in the UK<sup>84</sup>.

Modern Sky's new 2024 partnership with ATC aims to scale up artist and event exchange in both directions.



### Musician Residencies

**Partner:** The British Council/PRS for Music Foundation

Over five editions, Musicians in Residence China<sup>85</sup> has sent over 20 UK musicians to various Chinese cities since 2011. In 2019, new partnerships with Chinese hosts (e.g. Shanghai's Xintiandi and World Music Asia festival) allowed resident UK musicians to perform at major events. These low-stakes, exploratory residencies have led to lasting artistic relationships and even new band formations blending UK-China members.



### UK-China Youth Cultural Exchange programme<sup>86</sup>

In May 2025, The Birmingham City Council and Royal Birmingham Conservatoire launched a UK-China Youth Cultural Exchange Programme. The initiative invites over 100 young music talents from Chinese cities such as Nanjing and Guangzhou to join British youth orchestras for a series of concerts, artistic collaborations, and exchange activities in five UK cities, including London, Birmingham, and Cambridge.

## Sid Peacock's two-decade journey with Chinese traditional music

Composer Sid Peacock<sup>87</sup>, born in Bangor, Northern Ireland, has built a two-decade relationship with traditional Chinese music, bringing them into his artistic vision at the intersection of jazz, improvisation and contemporary music.

His journey began in 2006 at the invitation of a former student, which sparked a deep and lasting interest in Chinese musical traditions. In 2014, Sid went for a 6-week residency at Chongqing Chuanju Opera Theatre through the British Council/PRS Musicians in Residence China. That experience inspired *Open A Little Door* (2020), a unique and fiery fusion of Chuanju Opera Style, folk, roots and groove<sup>88</sup> co-created by his UK-based Surge Orchestra musicians and Chuanju Opera Theatre musicians. Sid was made an Honorary Ambassador for Sichuan Opera. In 2023, with British Council support, he collaborated with Pingtan artist Lu Jinhua for a new work premiered at Shanghai's Xintiandi World Music Festival<sup>89</sup>. In 2024, a new opportunity emerged unexpectedly: a young audience from his 2014 residency—now a director—invited Sid to Changsha to create music for a new Chinese immersive opera *Nie Xiaoqian*<sup>90</sup>. "You never know what a new day will bring." Sid wrote, "I arrived, had one day's rest, and then just worked constantly until I got back on the plane." he recalls, "no photo ops, no shaking hands - I was just like part of the team". His story is a testament to the unpredictable but profound outcomes of sincere, sustained cultural exchange. (Image © Sid Peacock)



## Concert tours for independent musicians

Indie booking companies and intermediaries like Beijing's Haze Sounds<sup>91</sup> and Xi'an-based SoundFact specialise in introducing international bands to China. These tours often span multiple cities, tapping into grassroots venues and digital fanbases, supported by hybrid public-private investment models.

For example, Haze Sounds has successfully brought UK artists such as TOY, Wolf Alice, and Carnival Kids (UK/ Norway) to Chinese audiences. In 2025, the agency organised the debut China tour for the London-based psychedelic rock band Temples<sup>92</sup>, with performances in Shanghai, Beijing, and Wuhan, which boosted a substantial fanbase in China.

SoundFact helped the Manchester-based rock band Maruja make their debut China tour in 2025, spanning Beijing, Shanghai, Hangzhou, Wuhan, Shenzhen and Guangzhou.



### Festival exchange with city partnership The city of Hangzhou x Montreux Jazz Festival China

In October 2021, the Montreux Jazz Festival, a globally renowned event originating from Switzerland, launched its inaugural Chinese edition in Hangzhou, Zhejiang province. The festival embraced the theme "When West Meets East," curating a diverse lineup that combined Chinese and Asian musical traditions with jazz, a genre experiencing renewed interest in China. Beyond merely hosting festivals, it was a strategic partnership with the city to leverage its rapid development and cultural heritage. For UK stakeholders, this provides a model to honour both local and international musical experience, as well as tapping into the growing movement in city branding and placemaking.

