



MUSIC FOR THE PEOPLE

Polaris Nordic

Digital Music in the Nordics

Maj 2022

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YouGov[®]



Content

3	Background, Method and Key Findings
7	Results
8	Streaming
21	Behavior
37	TV/movie streaming
43	About YouGov

Background

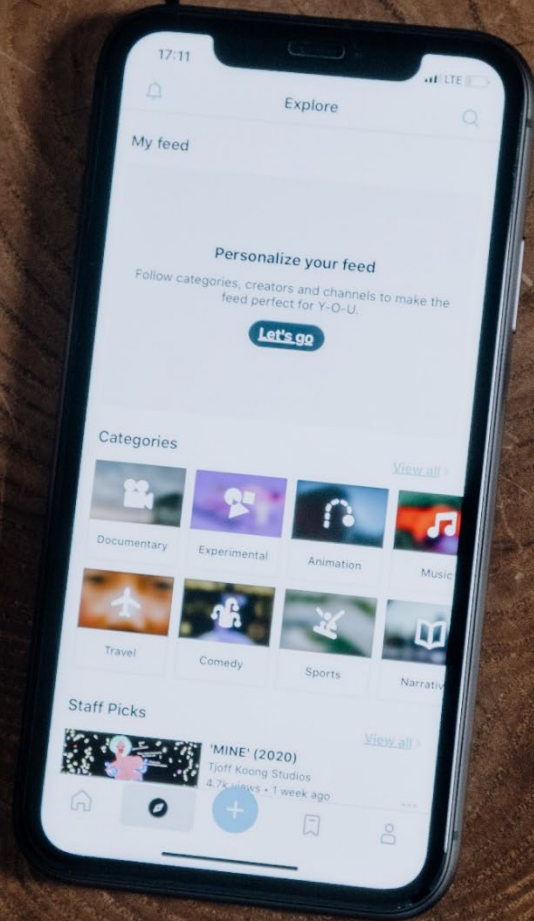


Purpose of the study

Polaris Nordic (a collaboration between the three Collective Management Organisations Koda, TONO and Teosto) needs knowledge about the use of digital music services in the Nordic region and has conducted a survey in collaboration with YouGov.

The study has previously been conducted in 2014, 2015, 2017, 2018 and 2020. This report covers the following topics:

- The market for digital music services
- Behavior on music streaming
- TV/movie streaming



Methodology



Sample

National representative sample on gender, region, and age (12-65 years old) in Denmark, Finland, Norway and Sweden.



Methodology

The data collection was carried out online using the Nordic YouGov Panel

2+2=

Interviews

DK: 1.009 interviews
SE: 1.012 interviews
NO: 1.013 interviews
FI: 1.012 interviews



Field Period

10 – 21 March 2022

Display of results

Flags are used to show the result for a given country. The results on a Nordic level are displayed by use of all four Nordic flags pooled together.



Nordic results



Danish results



Swedish results



Norwegian results



Finnish results

Key Findings

Streaming

- Across the Nordics, 9 out of 10 stream music and there has been an increase in subscription to a music streaming service. However, there is a slight decrease in the number of streamers in Denmark and Norway.
- Daily 0,4 more hours are spent on free streaming compared to paid versions measured per music listener. Sweden is now spending the most time listening to paid music streaming.
- Across the Nordics 53% are premium subscribers/ bundlers. They are typically more 18-34 and 35-49-years-old and less 50-65-years-old with a yearly household income of more than 700.000 DKK/SEK/NOK and they are much more frequent online live concert goers.
- Across the Nordics 38% only use free/trial versions. These users are typically in the age group 50-65 and to a lesser extent in the age group 18-29, more in the lowest income groups and more Finns than Danes, Norwegians, and Swedes .
- Across all four Nordic countries, YouTube is the most used digital music service for music. Spotify comes in second, and is in Norway almost on par with YouTube. Tiktok is closing in on Instagram.
- Netflix is still a true large Nordic player, while national public service providers are second measured on time spent.
- Across the Nordics time spend on paid music streaming is increasing. Denmark, Sweden and Norway experience an increase in the paid versions of Spotify whereas it decrease in Finland.
- Tiktok has outperformed YouTube Music in top 5 digital services used for streaming.

- Across the Nordics YouTube and Spotify still accounts for more than half of all time spent on daily music streaming, but social media is increasing.
- Across the Nordics, 1 in 4 do not subscribe to a paid streaming service because it is too expensive.

Behaviour

- Most people across the Nordics has not watched/listened to a live concert online. Sweden, Norway and Finland are at the forefront in attending online live concert whereas in Denmark 3 out 4 have not attended an online concert.
- Across the Nordics approximately 50% are unlikely to watch/listen to one or more live online concerts within the next 12 months.
- Radio - especially for people over 30 years - is still the main channel for discovering new songs but social media is a strong alternative as well as YouTube. Young people primarily discover new music via friends and social media, especially Tiktok and YouTube.

TV/movie streaming

- Across the Nordics, Netflix is the service with the highest number of subscribers. HBO, Viaplay and Disney+ is almost on par. The national TV stations' share of streaming subscription is in some Nordic countries like Denmark and Sweden almost as large as e.g. Netflix.
- Netflix is still a large Nordic player, while national public service providers are second measured on time spent. Excluding these, HBO Max is no. 2 in Sweden and Norway, while this applies to C-More in Finland and TV2 Play in Denmark.

Results



A top-down photograph of a smartphone with a black screen and a gold-colored frame, lying on a light-colored wooden surface. A white charging cable is plugged into the bottom of the phone. To the left of the phone, a pair of white earbuds with a white cable is visible. A semi-transparent white rectangular box is overlaid on the left side of the image, containing the word "Streaming" in a black, sans-serif font.

Streaming

Music consumption – Nordic and countries

Across the Nordics, 9 out of 10 stream music and there has been an increase in subscription to a music streaming service. However, there has been a slight decrease in the number of streamers in Denmark and Norway

Music streamers



Premium subscribers/ bundlers*



Only use free/trial versions (do not have any paid subscription)



Non-streamers

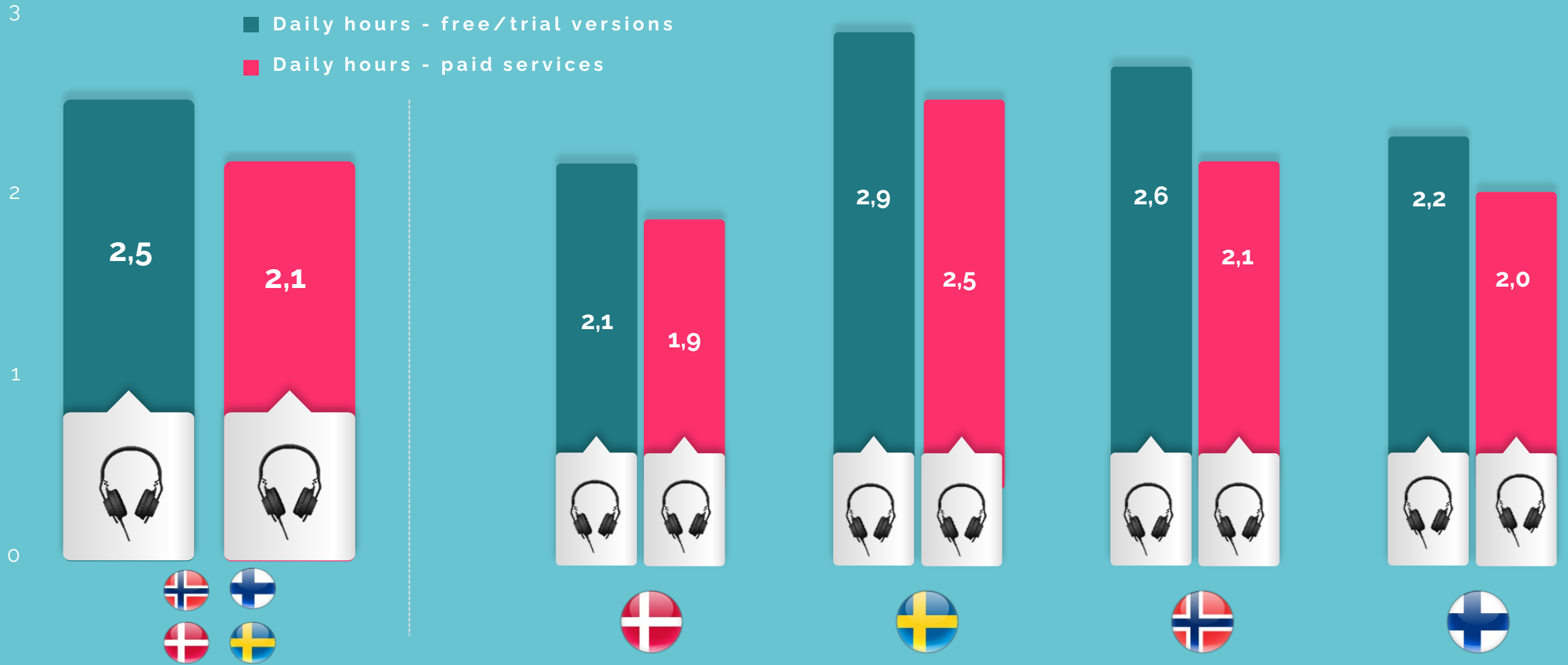


Average music streaming time per day (among streamers)



Daily hours used on streaming paid and free/trial digital audio streaming services incl. social media – Nordic and countries

Daily 0,4 more hours are spent on free streaming compared to paid versions measured per music listener. Denmark spend less hours on paid music streaming compared to the other Nordic countries, whereas Sweden now spend the most time listening to paid music streaming service



Nordic profile of people with a paid audio streaming service

Premium subscribers/bundlers

53%



53%



- ✓ No gender differences
- ✓ Typically more users in the age groups 18-34 and 35-49, and less in the age group 50-65
- ✓ Yearly household income of more than 700.000 DKK/SEK/NOK. In FI, this type of subscriber has a yearly household income of more than 40.500 Euro
- ✓ Much more frequent online live concert goers
- ✓ Many more subscribers of TV/movie streaming services
- ✓ More listen to playlists they have created themselves
- ✓ More listen to playlists recommended by their streaming service

Nordic profile of people with only a free/trial version of an audio streaming service

Only use free/trial versions

(do not have any paid subscription)

38%



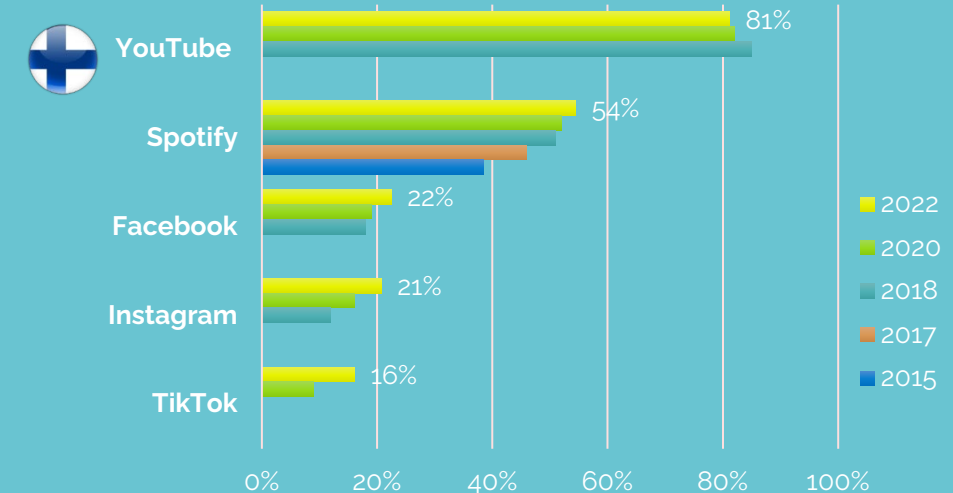
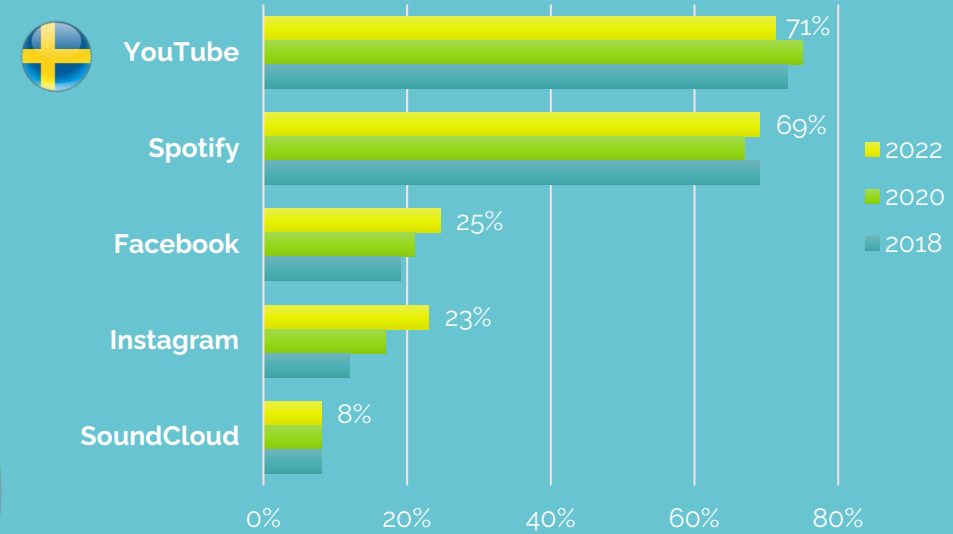
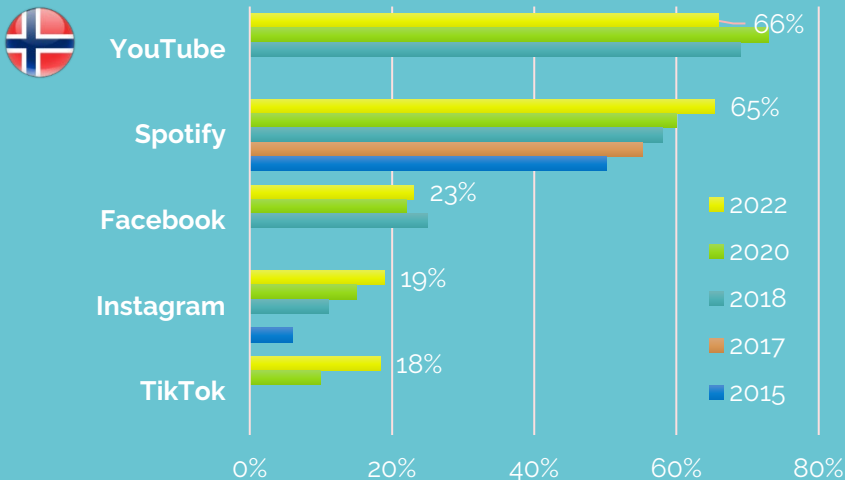
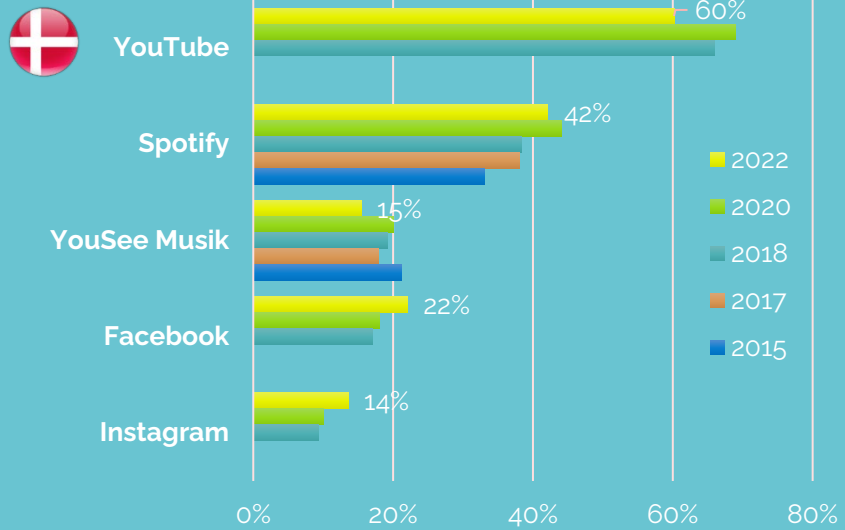
38%



- ✓ No gender differences
- ✓ More aged 50-65 and fewer aged 18-29
- ✓ More in the lowest income groups
- ✓ More Finns than Danes, Norwegians, and Swedes
- ✓ Less frequent online concert goers
- ✓ Are more unlikely to watch/listen to one or more online live concerts within the next 12 months
- ✓ Less frequent users of social media
- ✓ More also discover new favorite songs on the radio and Youtube

Top audio and video services used for streaming of music – Nordic and countries

Across all four Nordic countries, YouTube is the most used digital music service. Spotify comes in second and is in Norway almost on par with YouTube. Tiktok is closing in on Instagram

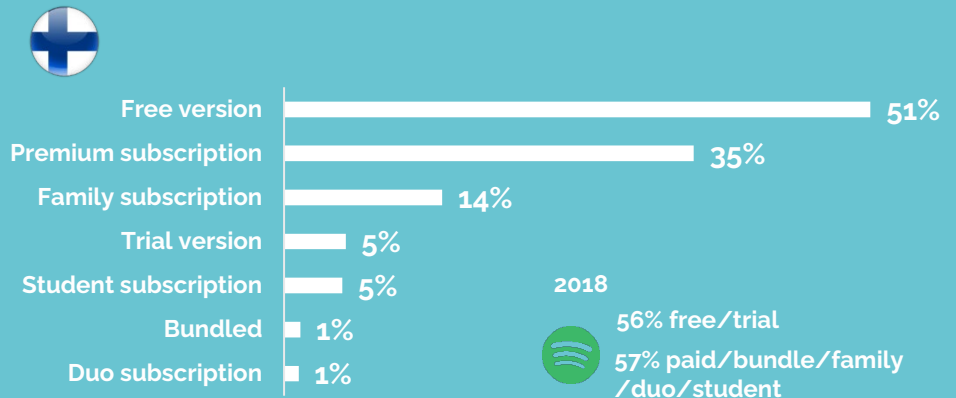
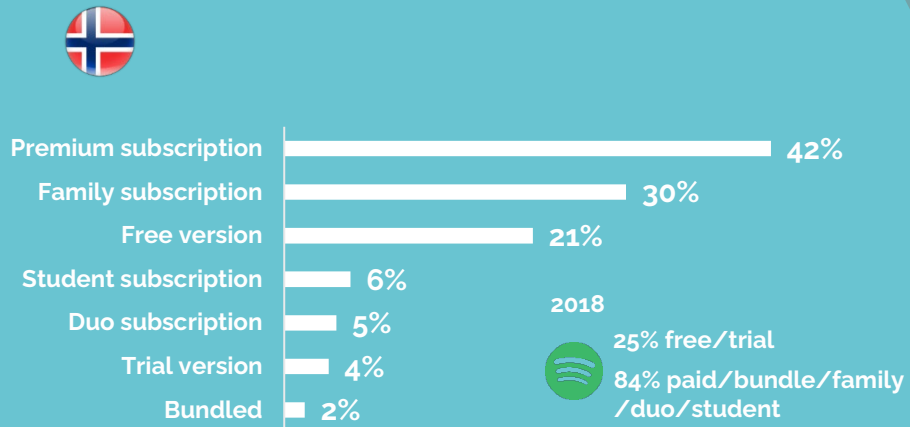
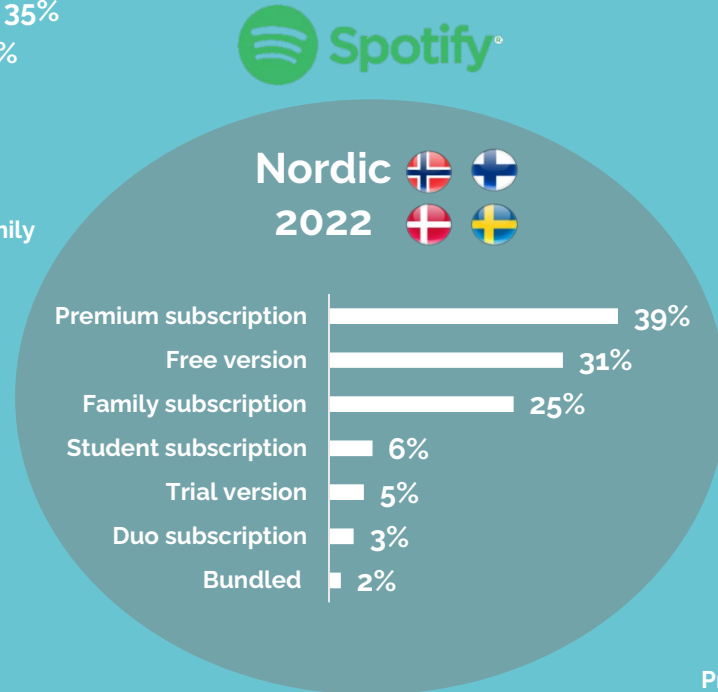
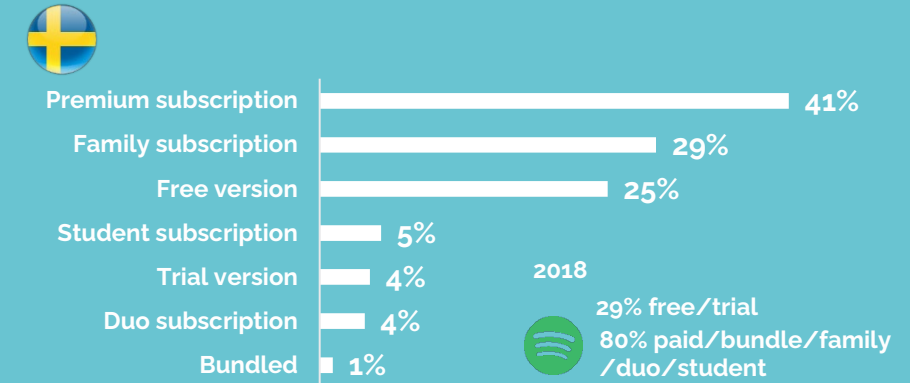
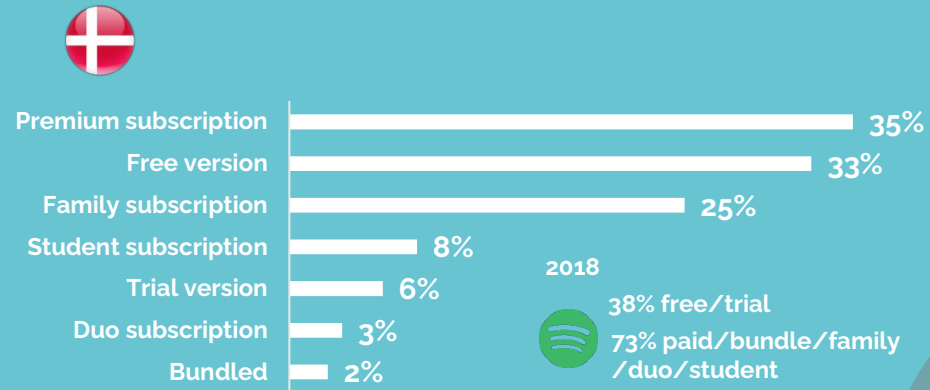


Q7a Which of the following digital music services do you use when listening to music?
Base: All

Q7b Which of the following digital services/social media do you use to watch or listen to music or music videos?
Base: All

Version of Spotify used in the past 12 months – Nordic and countries

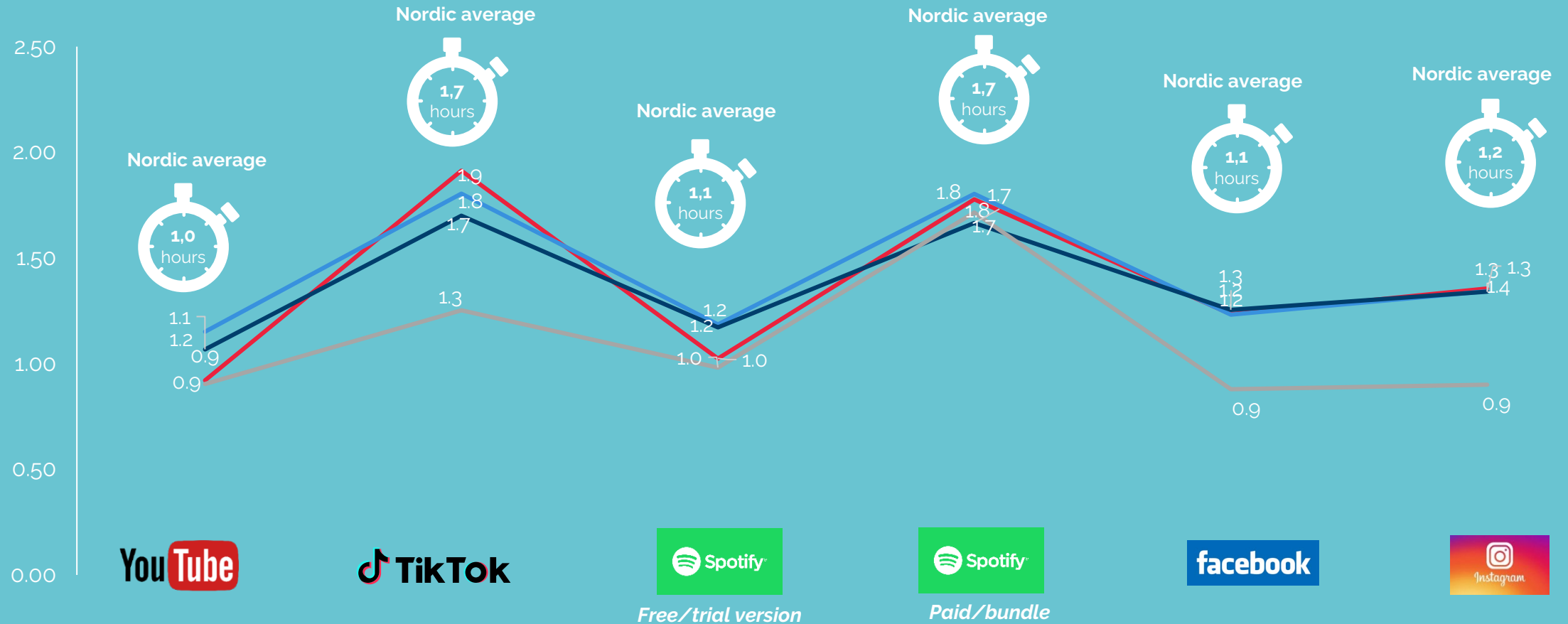
There is an increase in the paid versions of Spotify in Denmark, Norway and Sweden, but a decline in Finland. The Premium version is the single most used version in Denmark, Sweden and Norway, whereas the free version is the single most used version in Finland



Spotify usage
Note! Q9a was multiple choice question, so the total percentages are more than 100%

Daily time spend on the top 5 audio and video services used for streaming of music – Nordic and countries

Tiktok has outperformed YouTube Music in top 5 digital services used for streaming. Across the Nordics there is a small increase in time spent on paid/bundle Spotify subscriptions



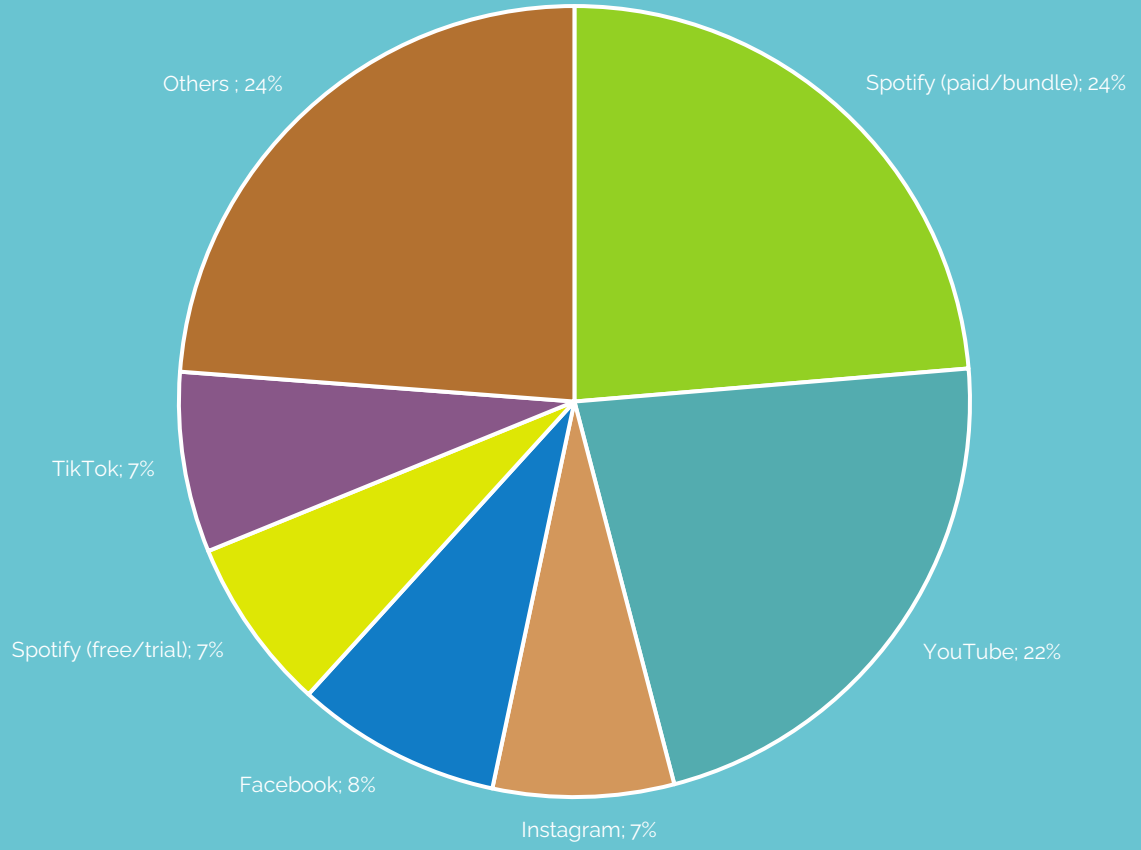
Q8a In a typical week, how many hours per day do you spend listening to music or watching music videos on the following digital services?
 Base: Use digital service to listen to music



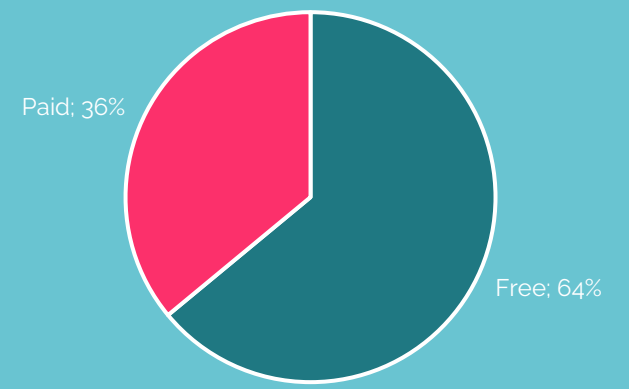
Daily time spent on the audio and video services used for streaming of music – Nordic overview

Across the Nordics, YouTube, and Spotify accounts for more than half of all time spent on daily music streaming. However, social media is increasing.

Nordic overview: Share of time spent on audio and video services used for music streaming



Share of time used on paid vs. free music streaming:

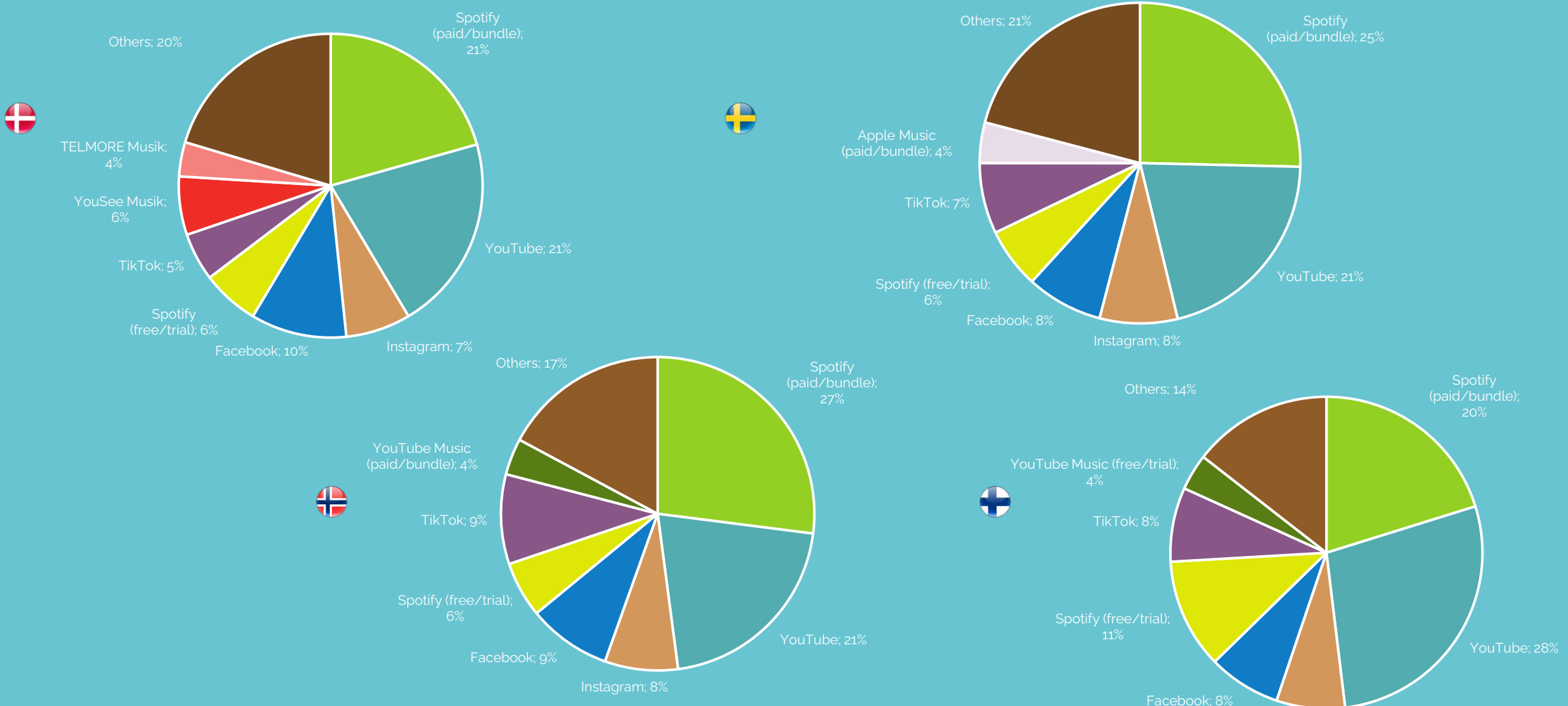


Q8a In a typical week, how many hours per day do you spend listening to music or watching music videos on the following digital services?
Base: Use digital service to listen to music

Note: Others = All Services with 3% or below share of daily time spend + the option "Other digital service"

Daily time spent on the audio and video services used for streaming of music – Nordic overview

Across the Nordics, YouTube and Spotify accounts for roughly half of all time spent on daily music streaming



Q8a In a typical week, how many hours per day do you spend listening to music or watching music videos on the following digital services?
 Base: Use digital service to listen to music

Note: Others = All Services with 3% or below share of daily time spend + the option "Other digital service"

Daily time spent on the paid and free audio and video services used for streaming of music – Nordic overview
Across the Nordics, time spent on paid music streaming is increasing

Share of time used on paid vs. free music streaming:



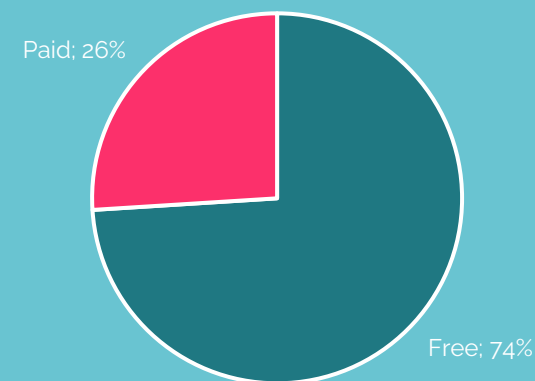
Share of time used on paid vs. free music streaming:



Share of time used on paid vs. free music streaming:

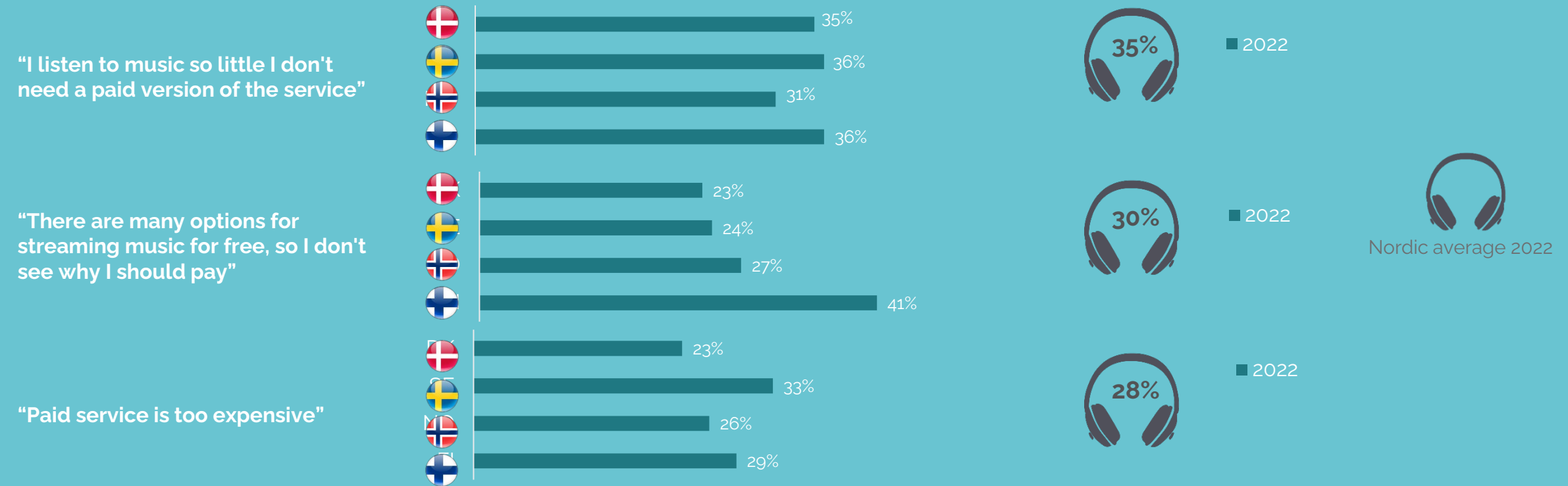


Share of time used on paid vs. free music streaming:



Reasons to not subscribe to a music streaming service – Nordic and countries

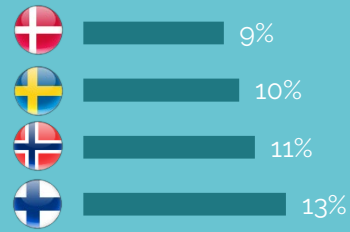
Across the Nordics, 1 out of 4 do not subscribe to a paid streaming service because it is too expensive. 1 out of 3 think they have so many options for streaming music for free that they don't see why they should pay or listen too little to music to have a paid version



Reasons to not subscribe to a music streaming service – Nordic and countries

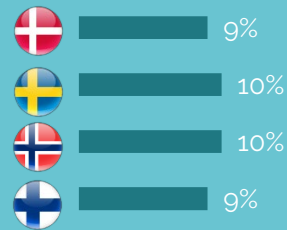
1 in 10 think that the quality of the service are too low to pay, or they spend their money for music on LPs/ concerts/CDs instead. Finally, some use somebody else's paid service - this number is slightly increasing.

“The features of a paid service are not so good that I'm willing to pay for them”



■ 2022

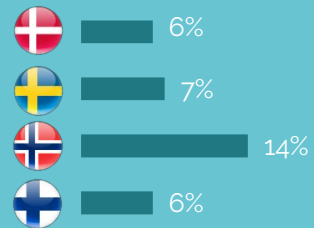
“I spend my music budget on LPs/ concerts/CDs”



■ 2022

Nordic average 2022

“I use someone else's paid service, but do not pay myself”



■ 2022

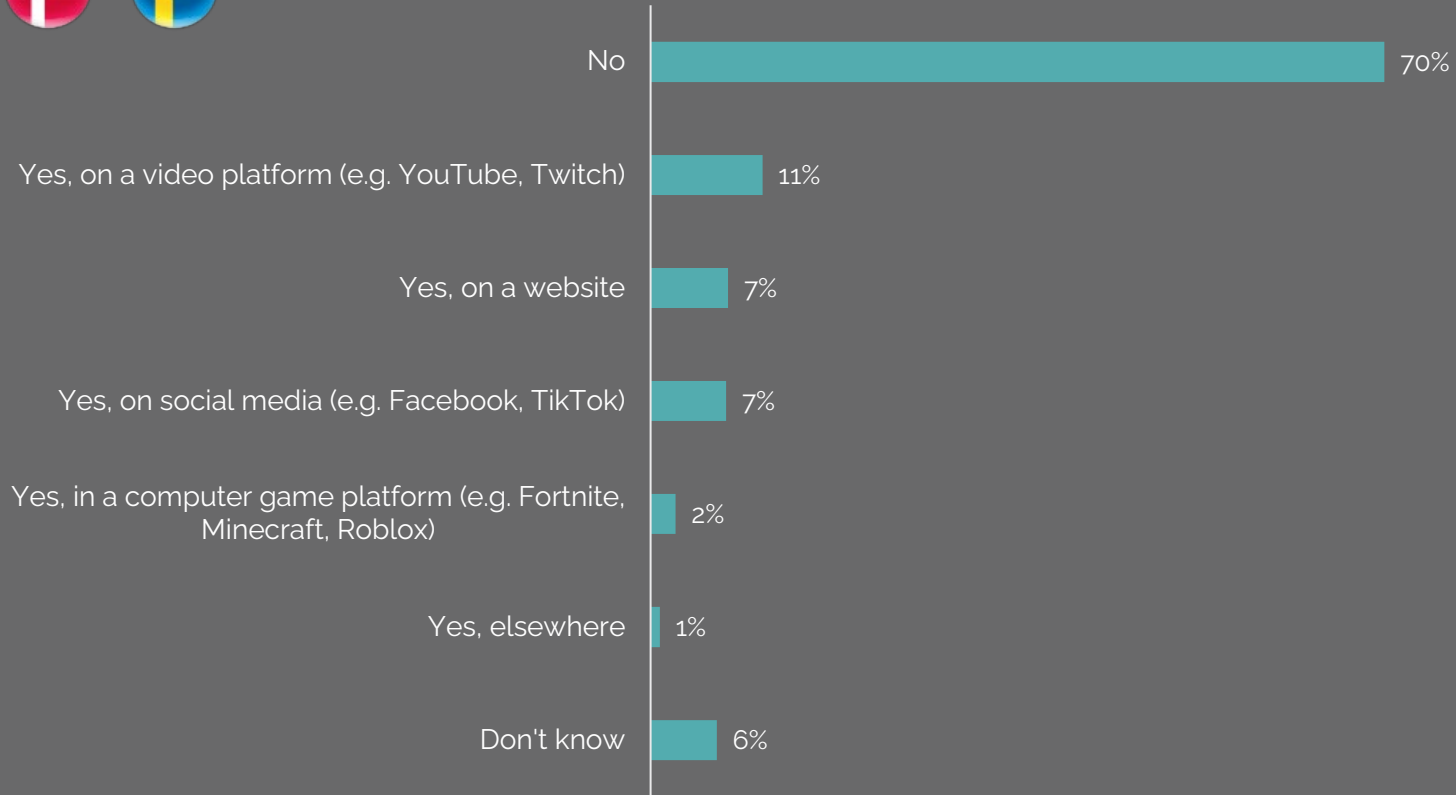


Behavior



Online Live Concerts – Nordic

The majority of people across the Nordics have not watched/listened to an online live concert



NET: Have watched/listened

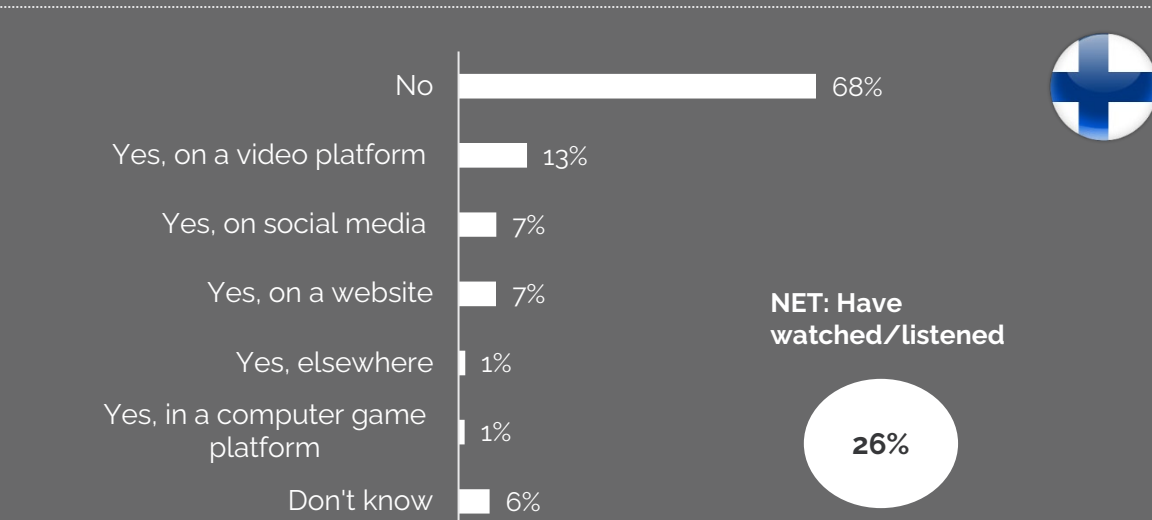
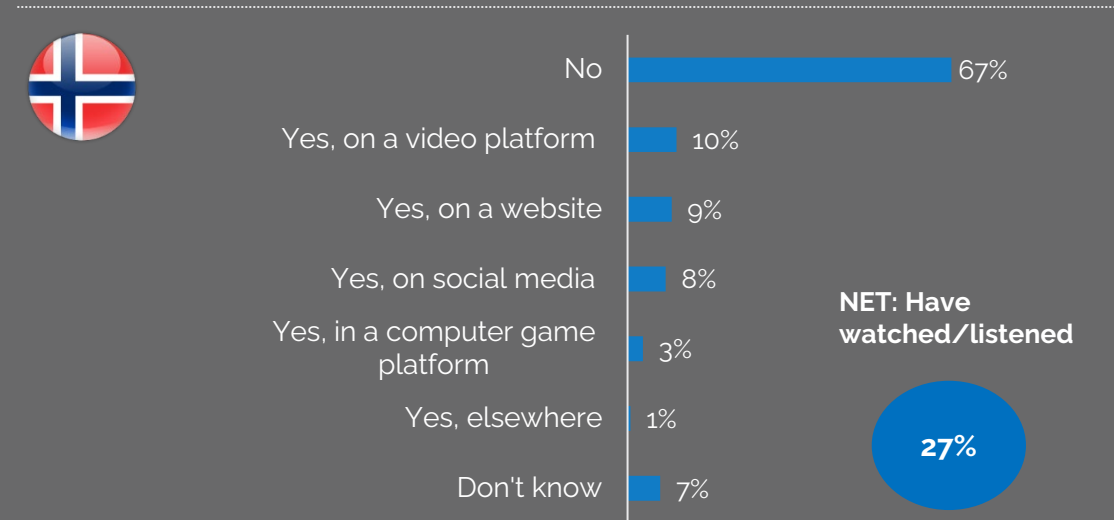
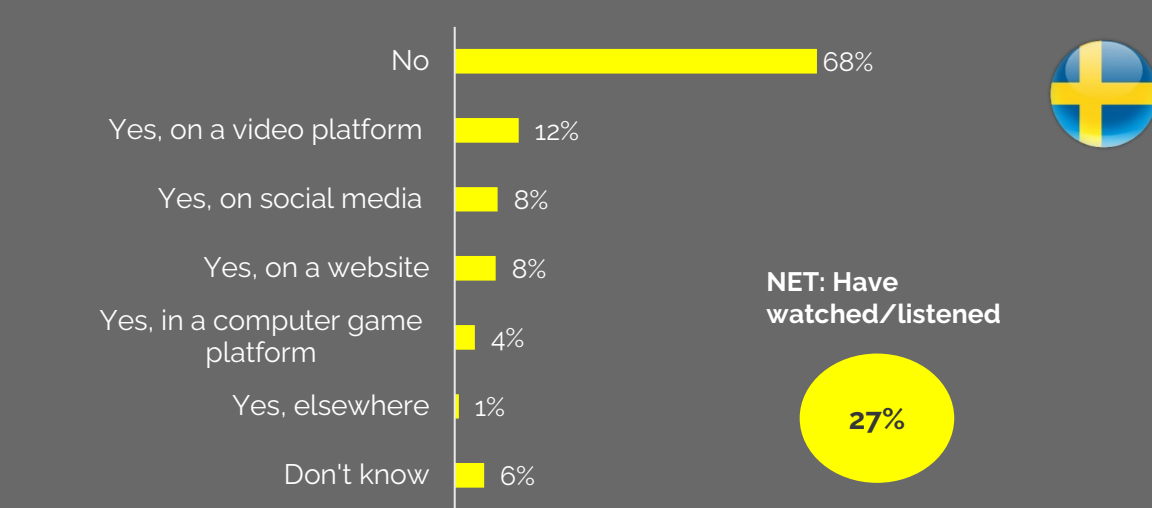
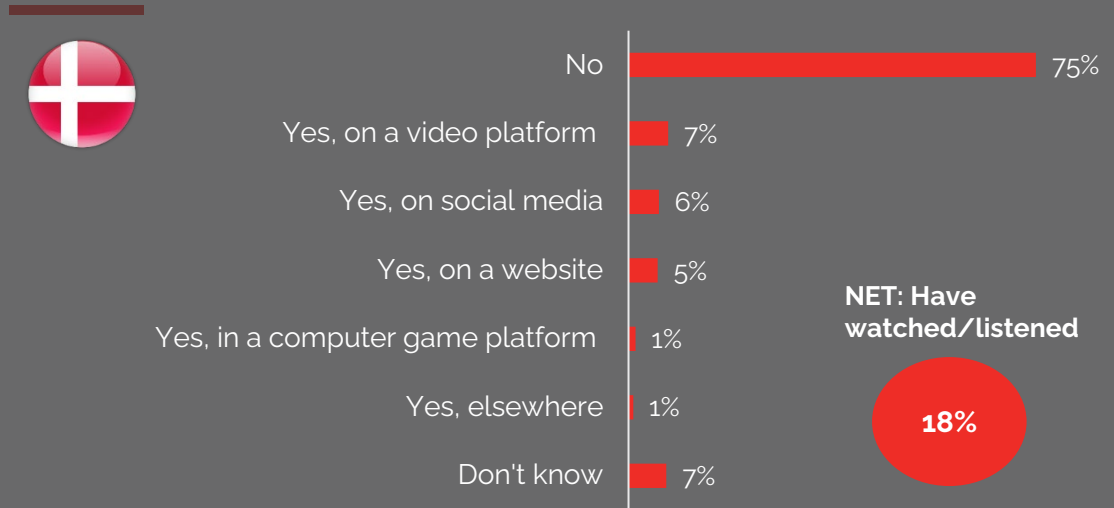


Q30 Have you watched/listened to a live concert online in the last 12 months

Base: All

Online Live Concerts – Countries

Sweden, Norway and Finland are at the forefront in attending online live concerts whereas in Denmark 3 in 4 have not tried



Q30 Have you watched/listened to a live concert online in the last 12 months

Base: All

Online Live Concerts – Nordic and countries

When attending only once people do so via social media. When attending two or more most people use video platforms like YouTube or Twitch



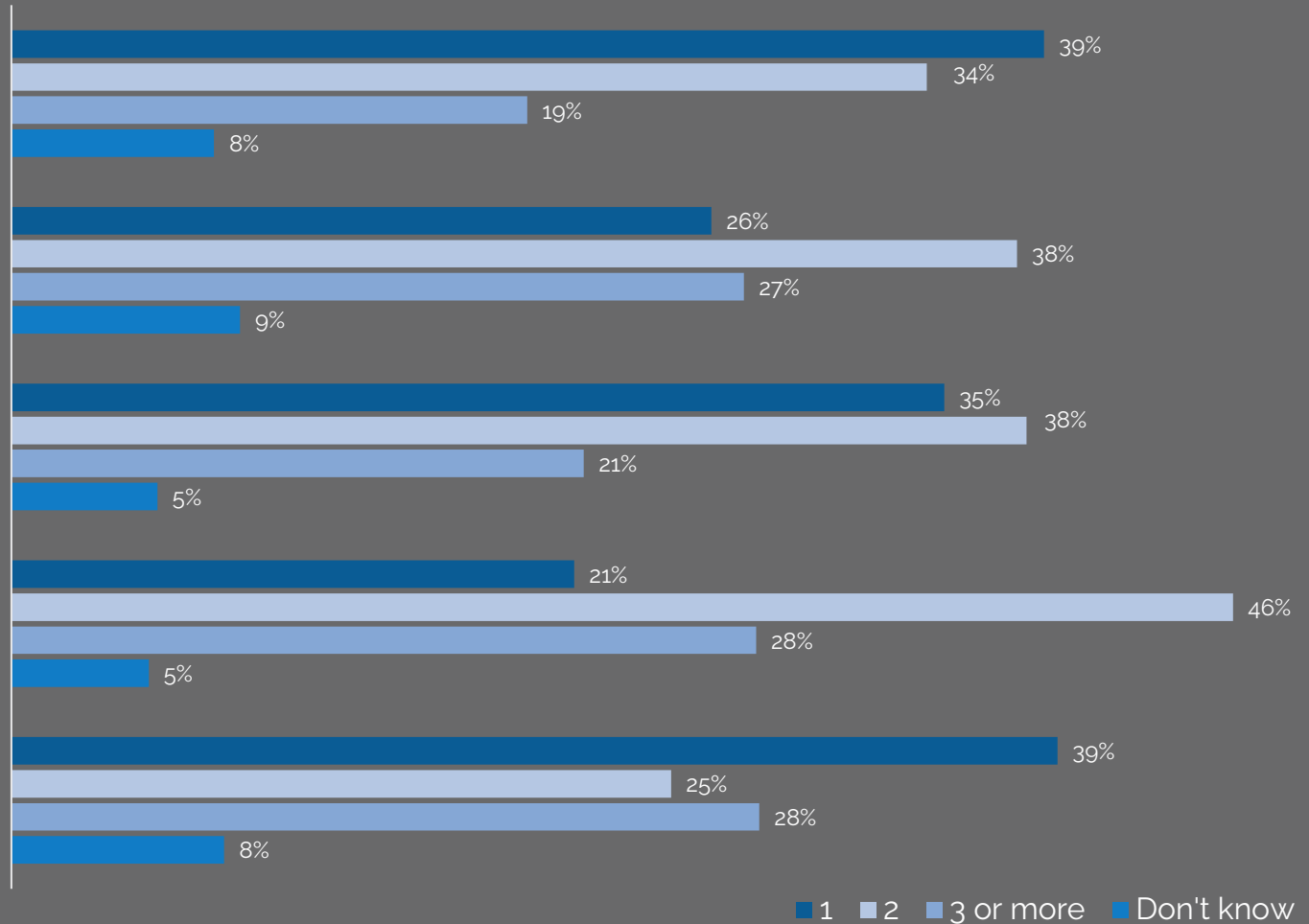
Social media (e.g. Facebook, TikTok)

Video platform (e.g. YouTube, Twitch)

Website

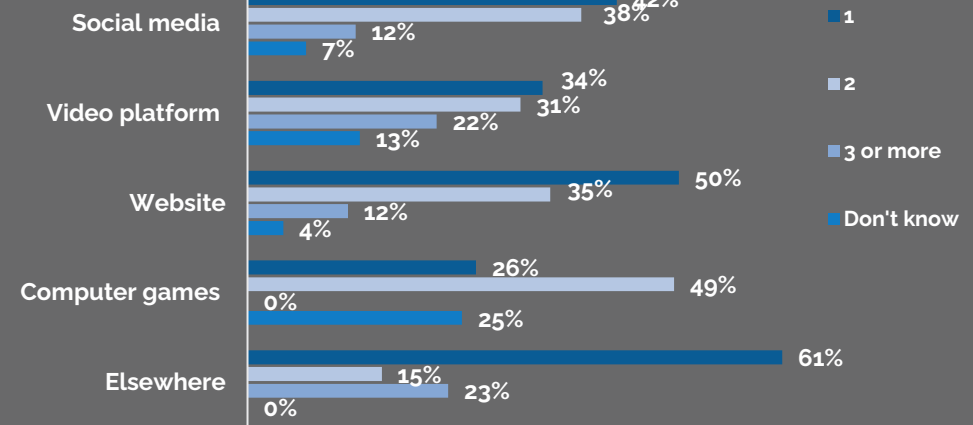
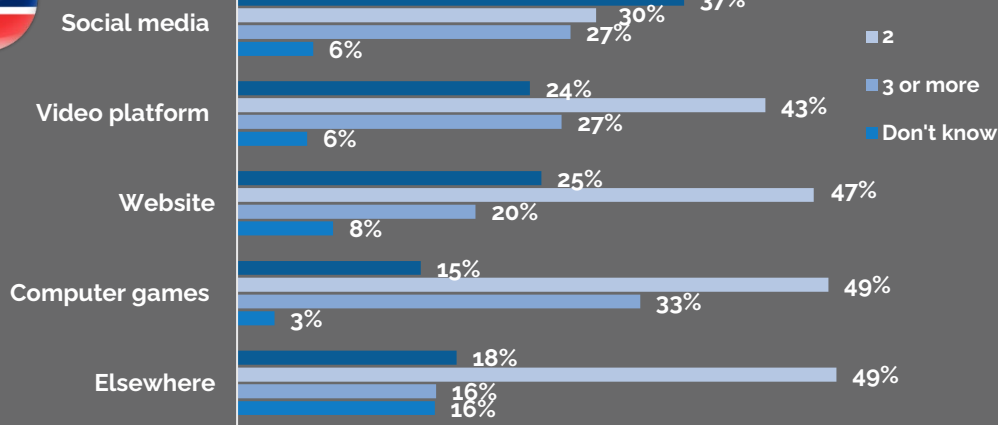
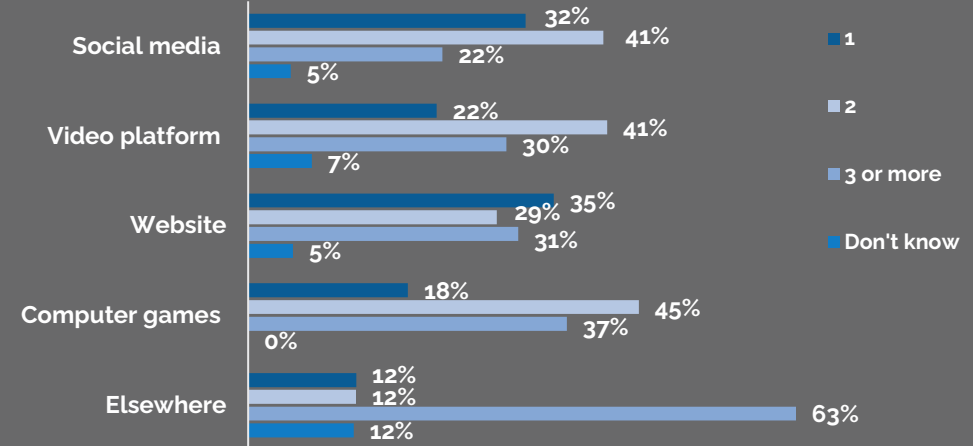
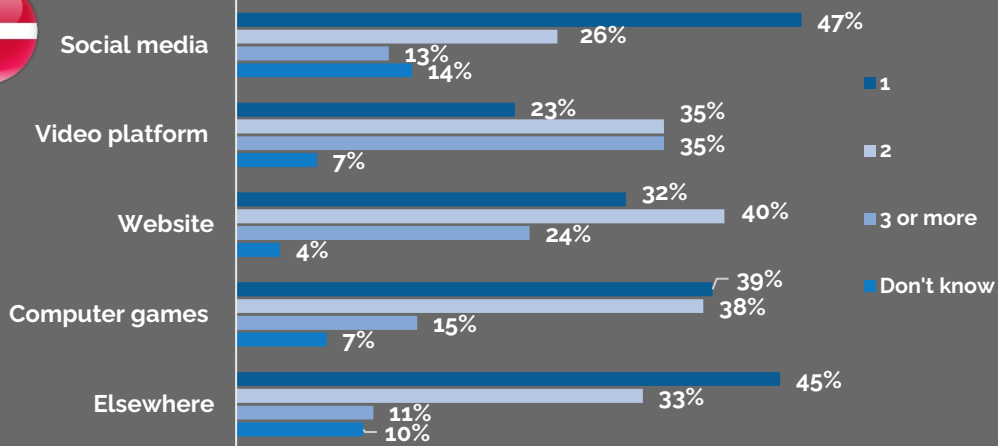
Computer games (e.g. Fortnite, Minecraft, Roblox)

Elsewhere



Q31 How many times have you watched/listened to a live concert online during the last 12 months on the following?
Base: Have you watched/listened to a live concert online

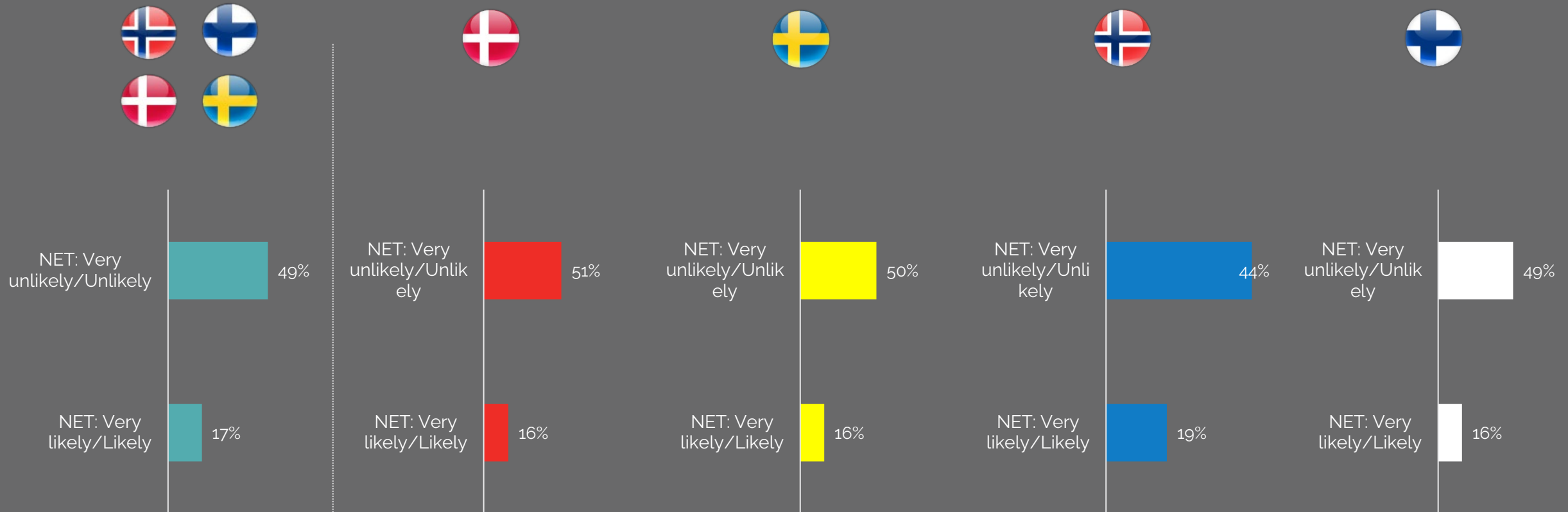
Gamers across the Nordics are heavy users, but they are a very small community



Q31 How many times have you watched/listened to a live concert online during the last 12 months on the following?
Base: Have you watched/listened to a live concert online

Online Live Concerts – Nordic and countries

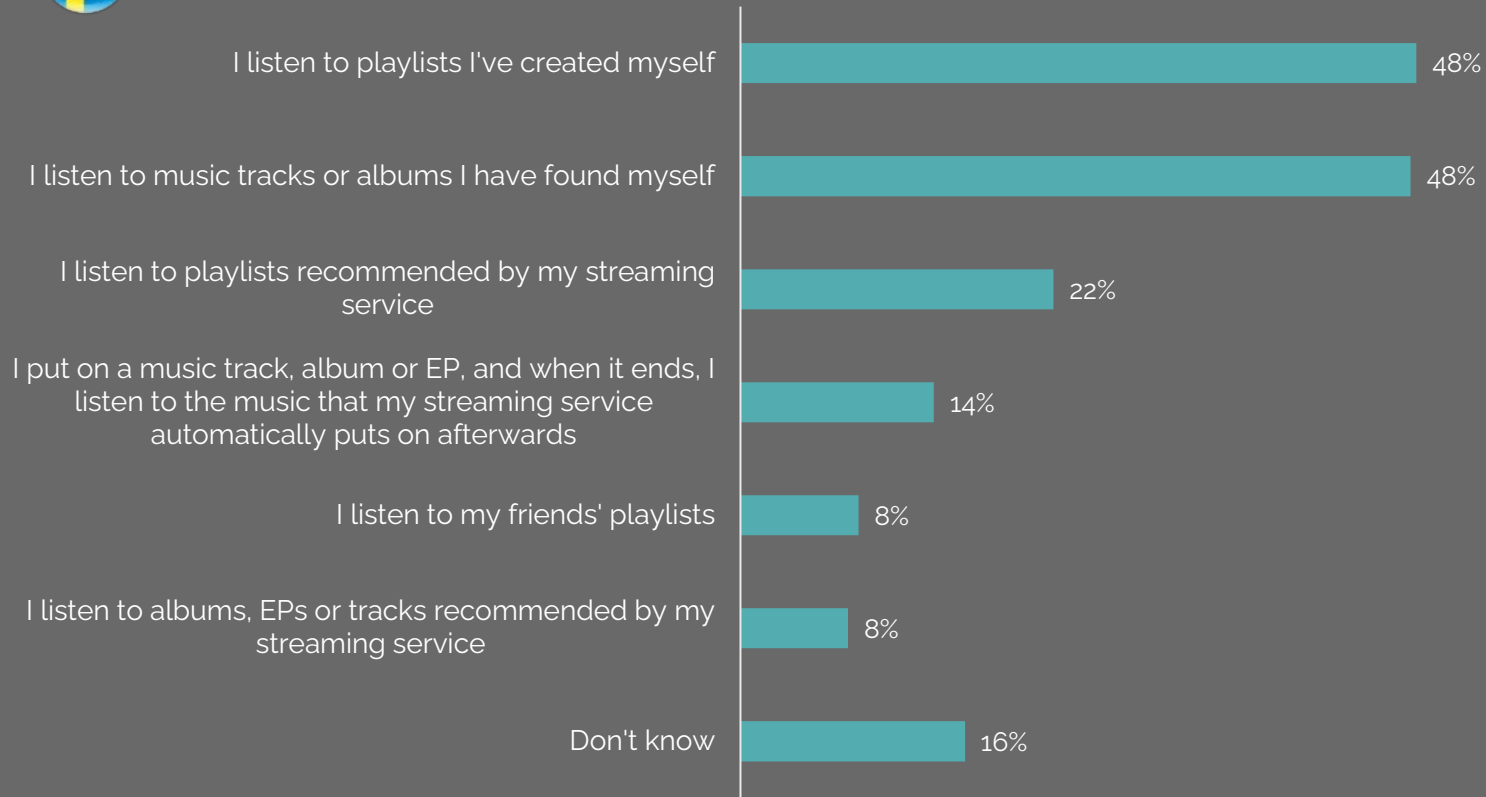
Across the Nordics approximately 50% are unlikely to watch/listen to one or more online live concerts within the next 12 months



Q33 How likely or unlikely are you to watch / listen to one or more live online concerts within the next 12 months?

Base: All

Across the Nordics, people prefer to listen to playlist or tracks they have found themselves

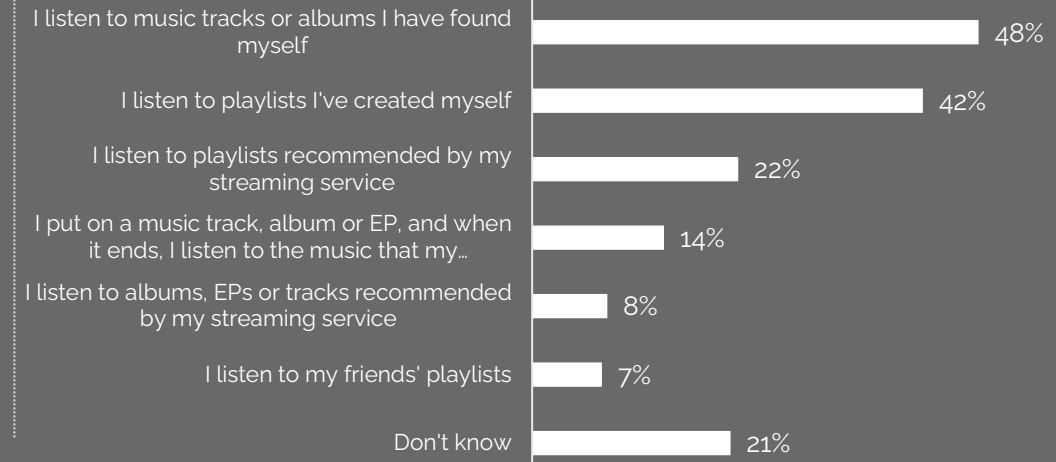
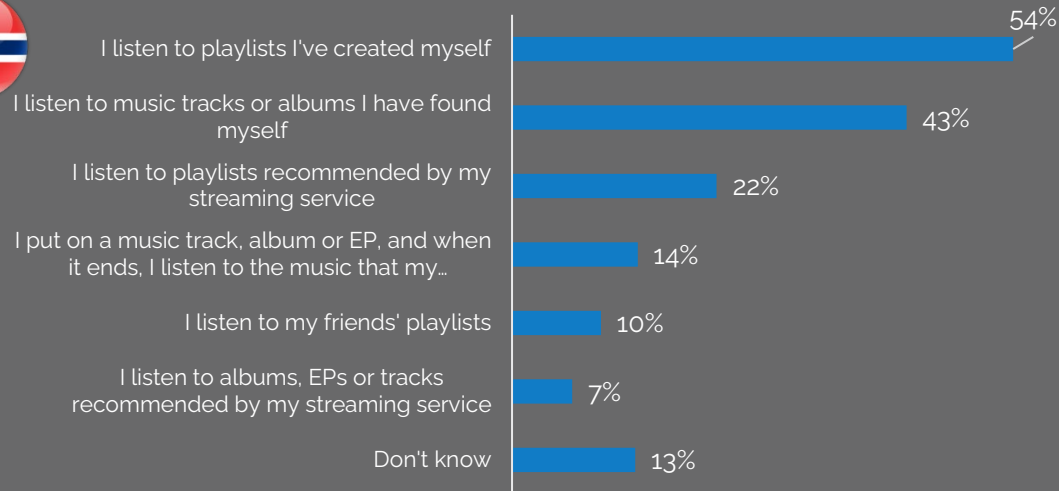
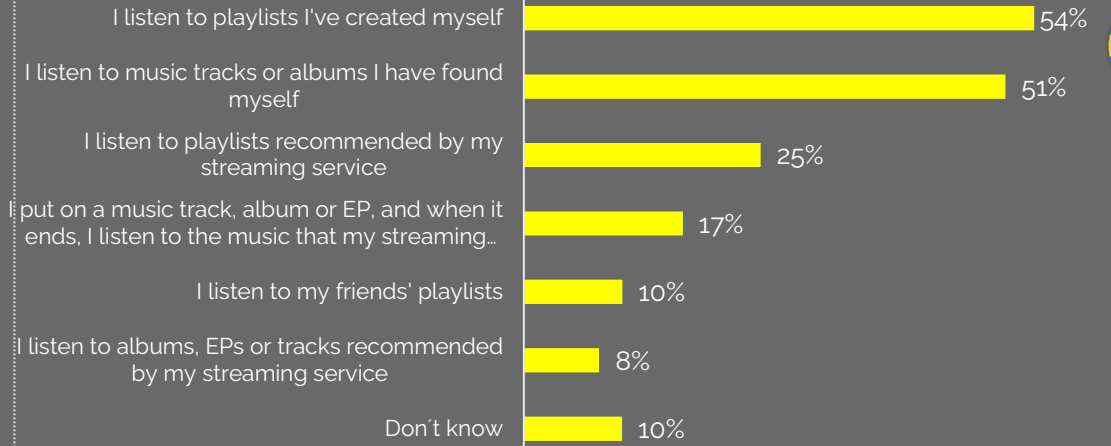
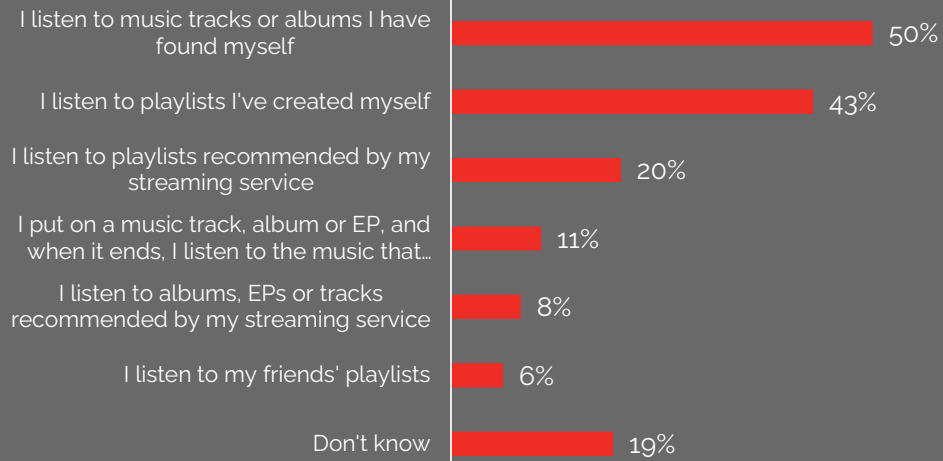


Q10 When listening to music on your digital music service, which of these statements best suits your daily consumption?

Base: All

Online Live Concerts – Countries

Especially in Denmark and Sweden more than 50% listen to playlists they have created themselves



Q10 When listening to music on your digital music service, which of these statements best suits your daily consumption?

Base: All.

Channels where a new song was discovered – Nordic

Radio is still the main channel for discovering new songs, but social media is a strong alternative



I heard it first in a playlist or as a recommendation on a streaming service

I heard it first on the radio

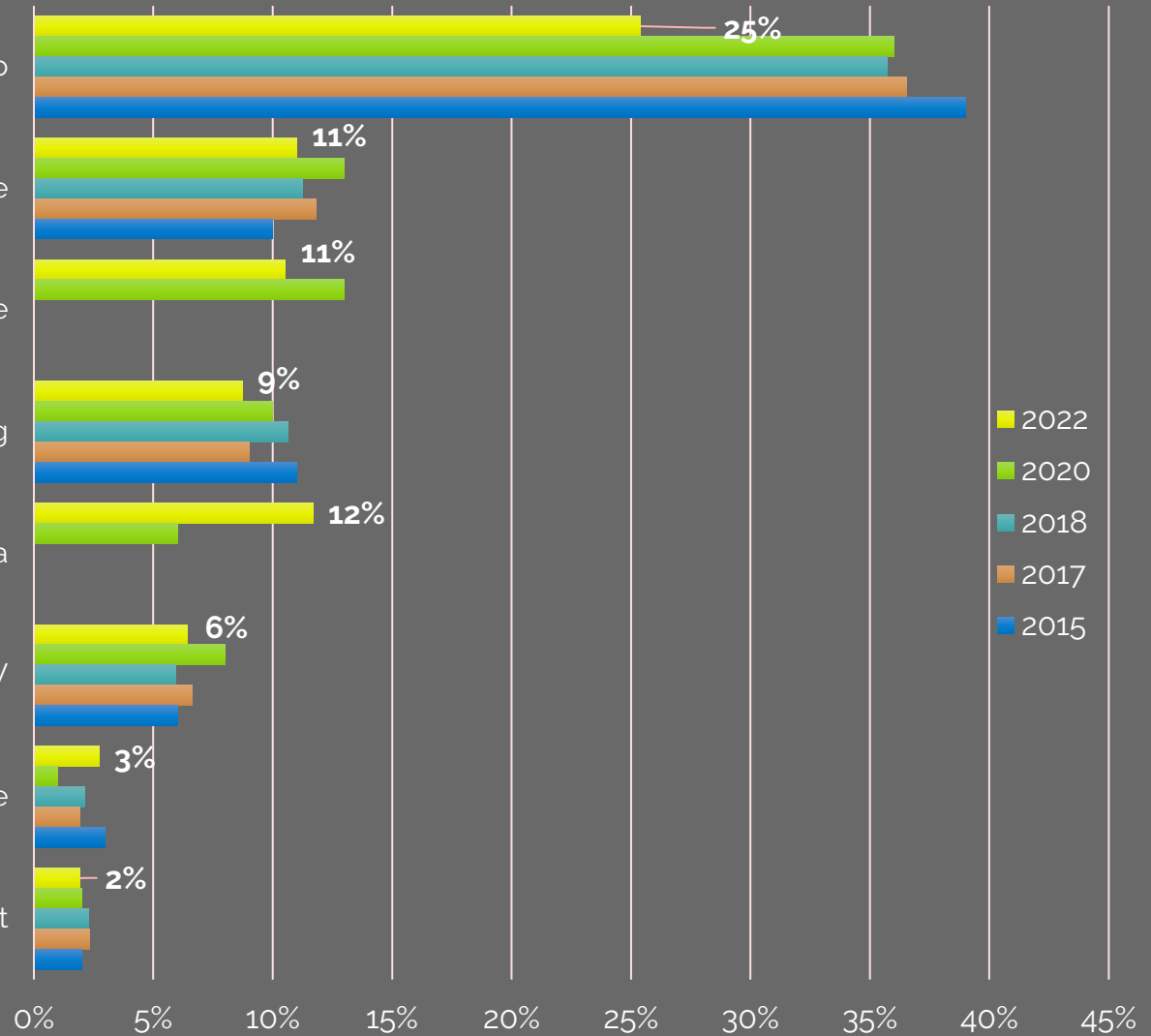
I heard it first on YouTube

A friend played the song

I heard it first on TV

I heard it first on some other Internet site

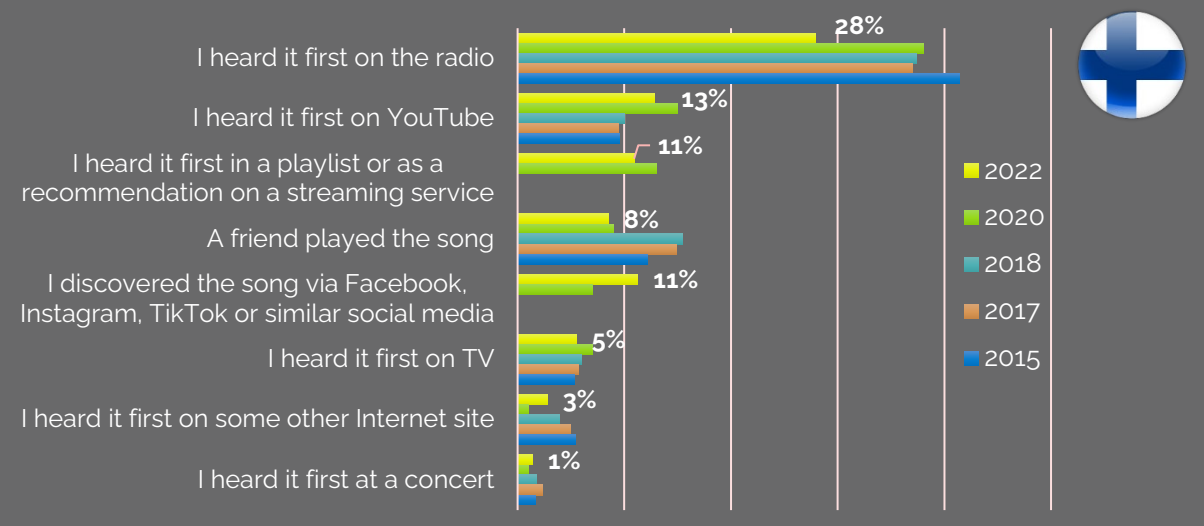
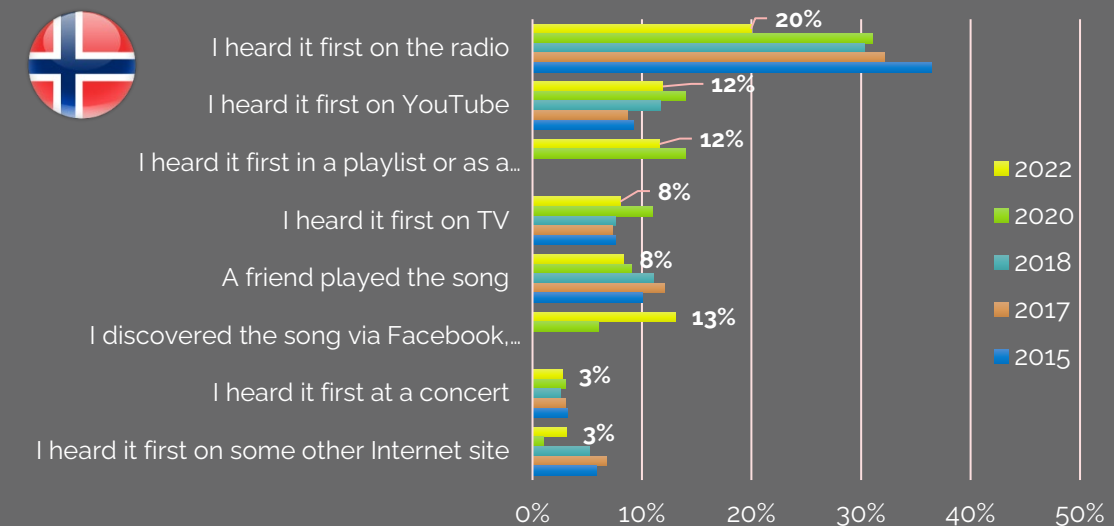
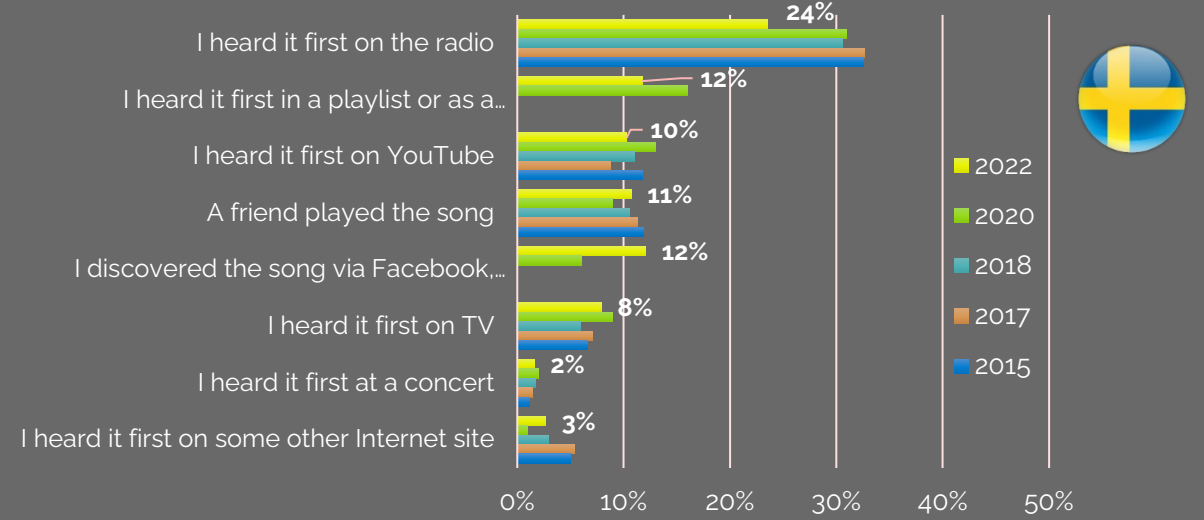
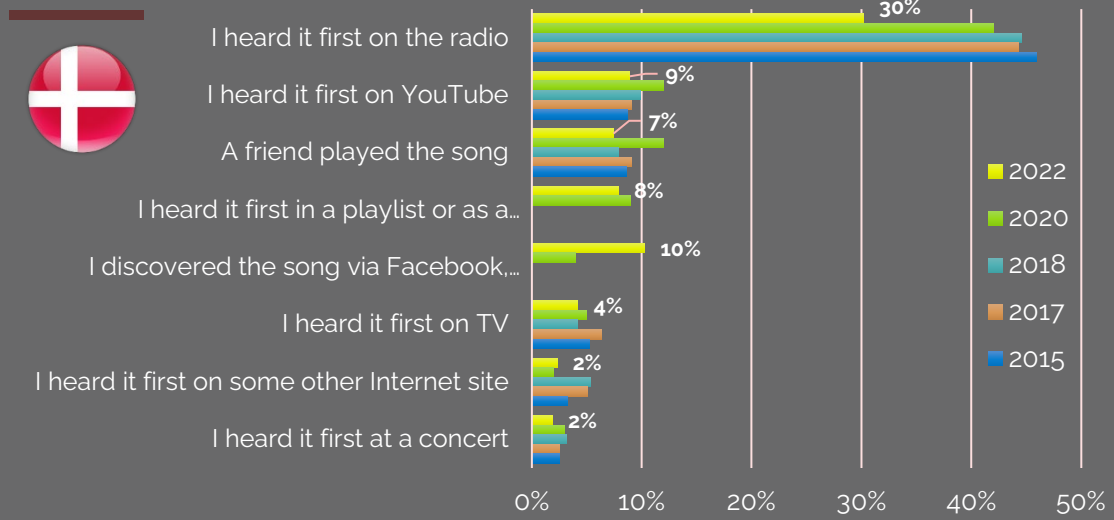
I heard it first at a concert



Q21 Think back to the last time you discovered a new song/piece of music you really liked: How did you discover it?
Base: All

Channels where a new song was discovered - countries

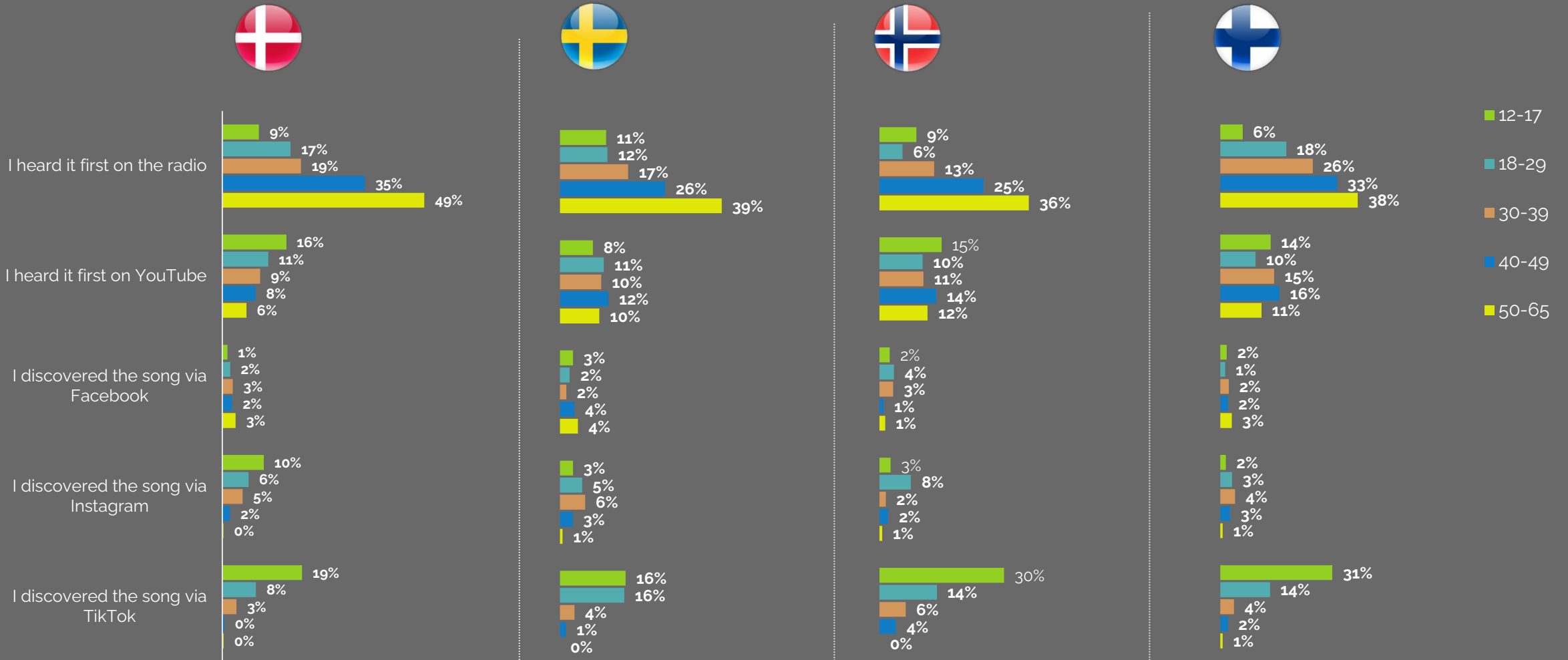
Radio is still the main channel for discovering new songs, but social media is a strong alternative as well as YouTube



Q21 Think back to the last time you discovered a new song/piece of music you really liked: How did you discover it?
Base: All

Channels where a new song was discovered - by age

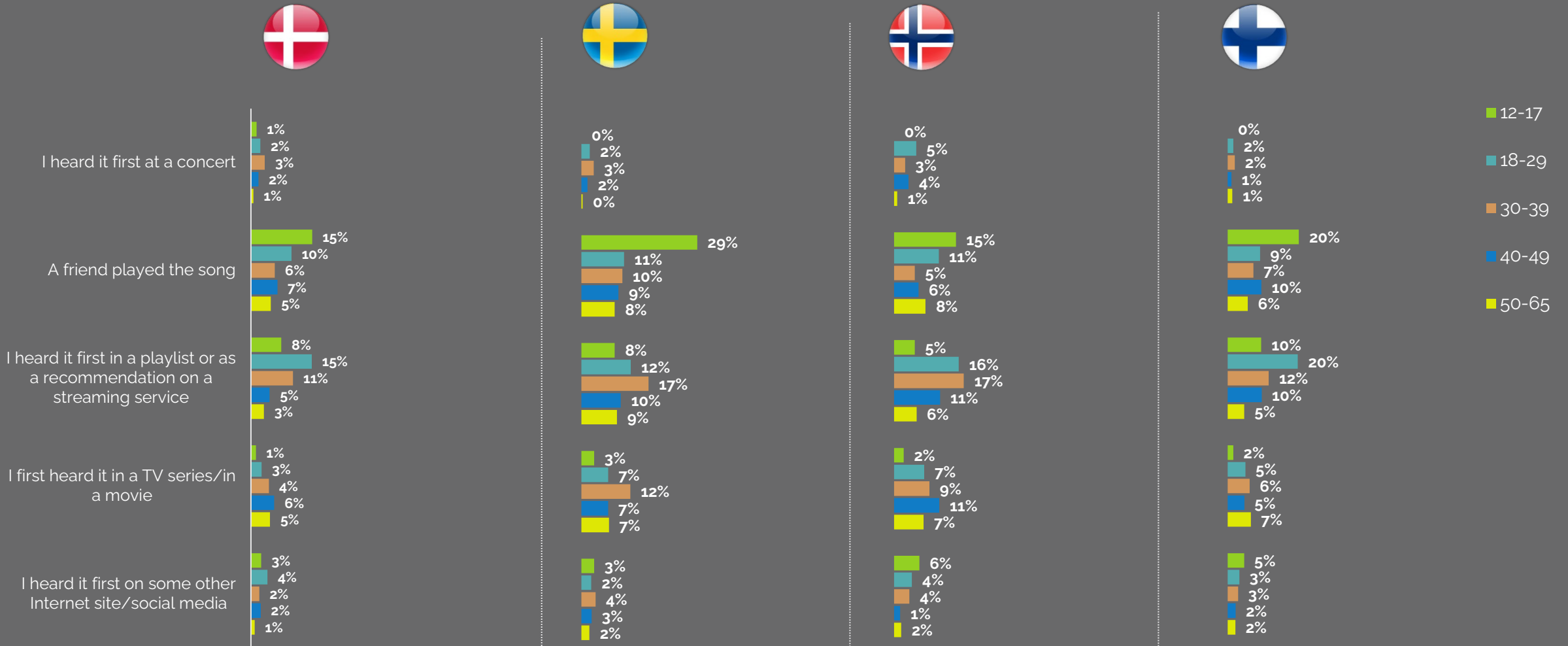
1 of 2: Radio is primarily used to discover new music by people above the age of 30. Young people primarily discover new music via friends and social media, especially TikTok and YouTube



Q21 Think back to the last time you discovered a new song/piece of music you really liked: How did you discover it?
Base: All

Channels where a new song was discovered - by age

2 of 2: Radio is primarily used to discover new music by people above the age of 30. Young people primarily discover new music via friends and social media especially TikTok and YouTube




Q21 Think back to the last time you discovered a new song/piece of music you really liked: How did you discover it?
Base: All




TV/movie streaming

Commercial Services: Streaming of TV/movie content – The Nordic markets

Subscribe to at least one commercial TV/movie content streaming service

 **85%** (70%)

 **79%** (68%)

 **86%** (77%)

 **72%** (61%)

Nordic total

81% (69%)

Commercial service providers
Average streaming time per day

 **3,3 hours**

 **3,4 hours**

 **3,8 hours**

 **2,2 hours**

3,3 hours

Public Services: Streaming of TV/movie content – The Nordic markets

Stream at least one Public Service TV/movie content streaming service

 51%

 52%

 40%

 37%

Nordic total

45%

Public service providers

Average streaming time per day

 1,0 hours

 0,9 hours

 0,9 hours

 1,2 hours

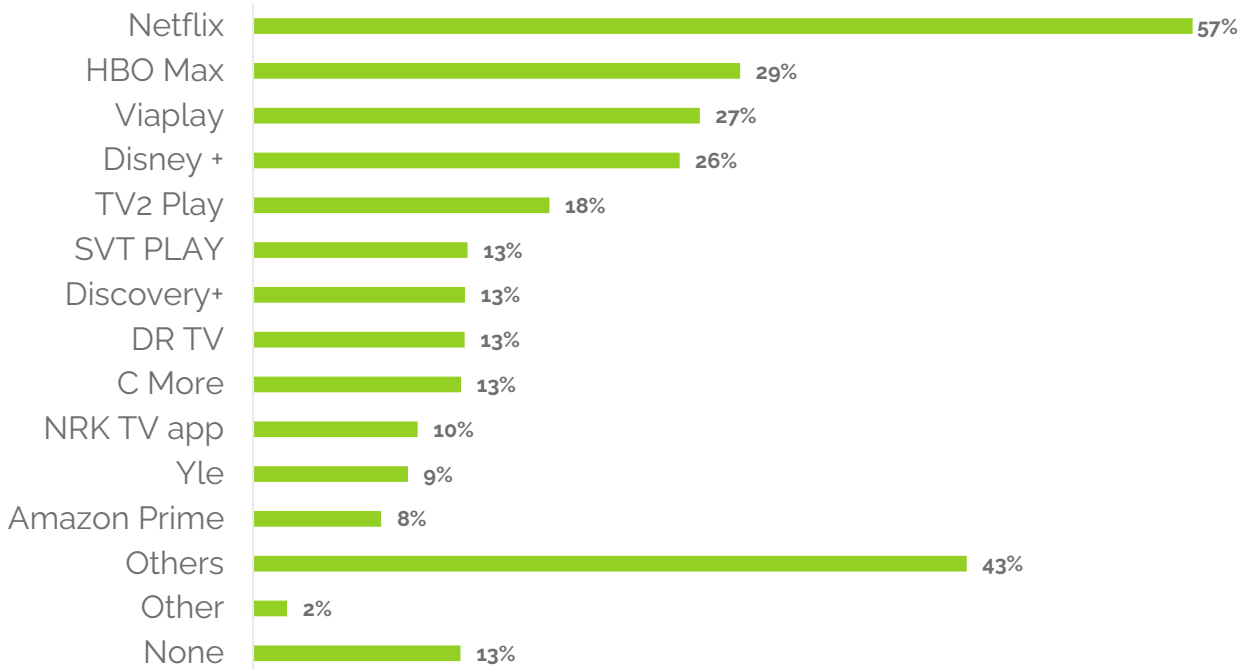
1,0 hours

Streaming of TV/movie content – Nordic

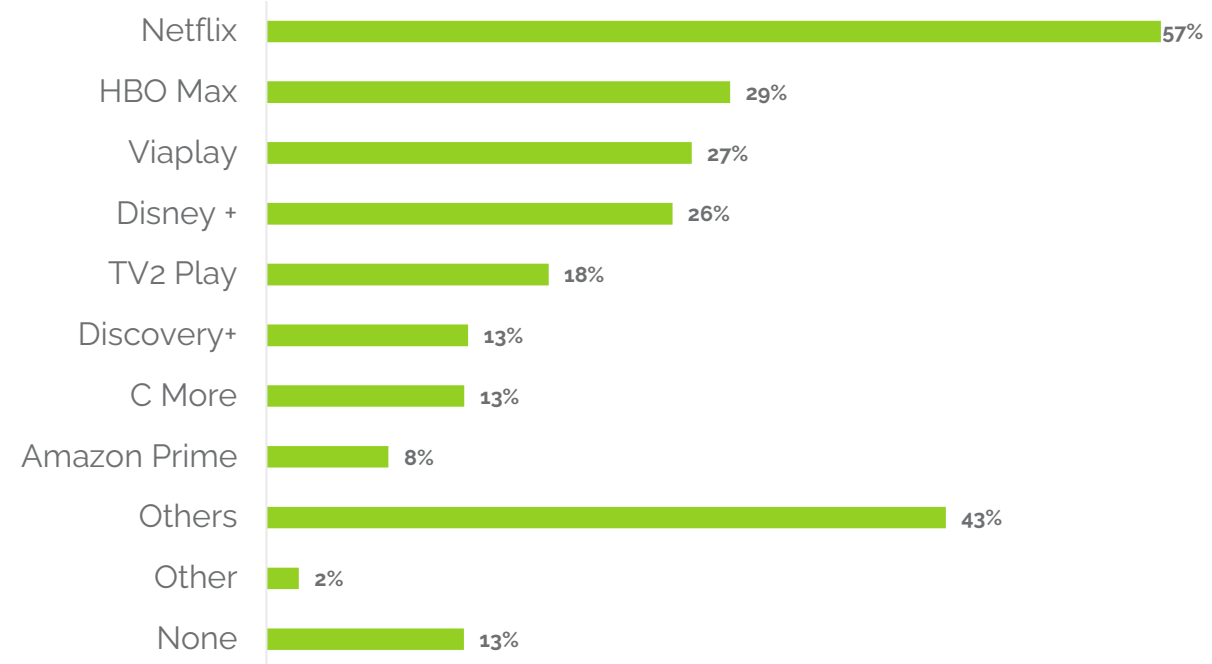
Across the Nordics, Netflix is the service most have subscribed for. HBO, Viaplay and Disney+ is almost on par



All service providers



Commercial service providers

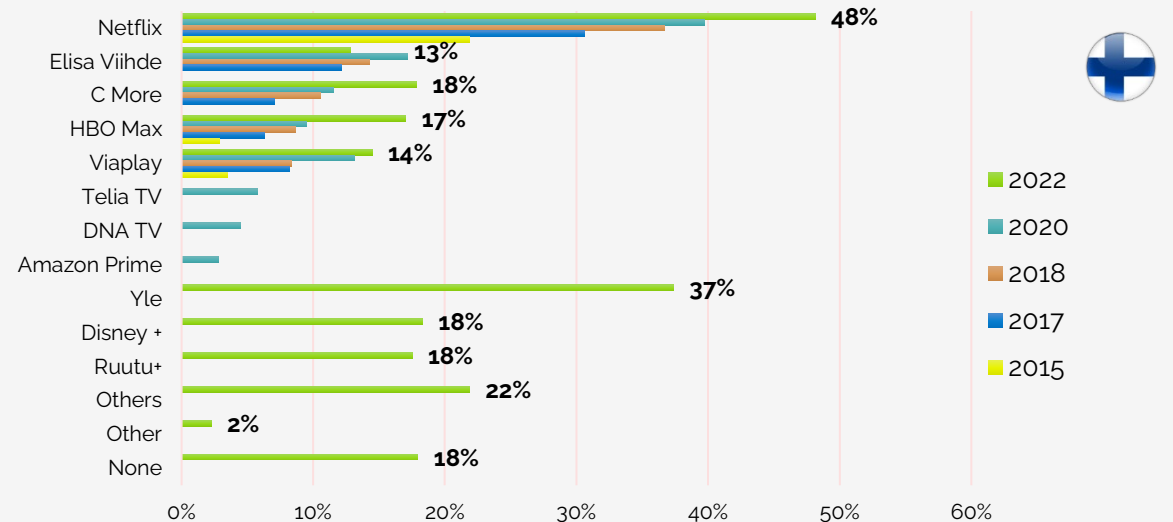
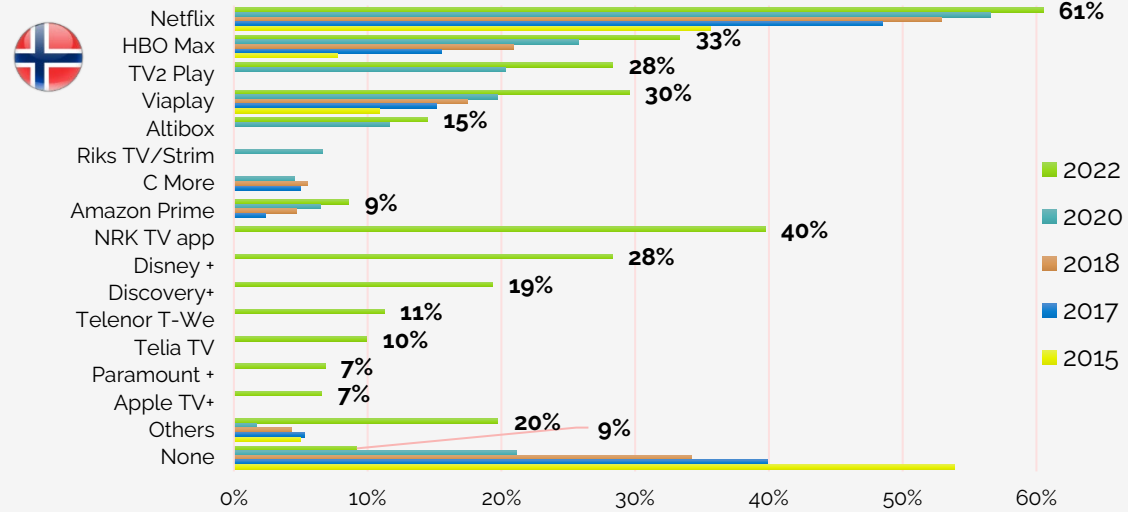
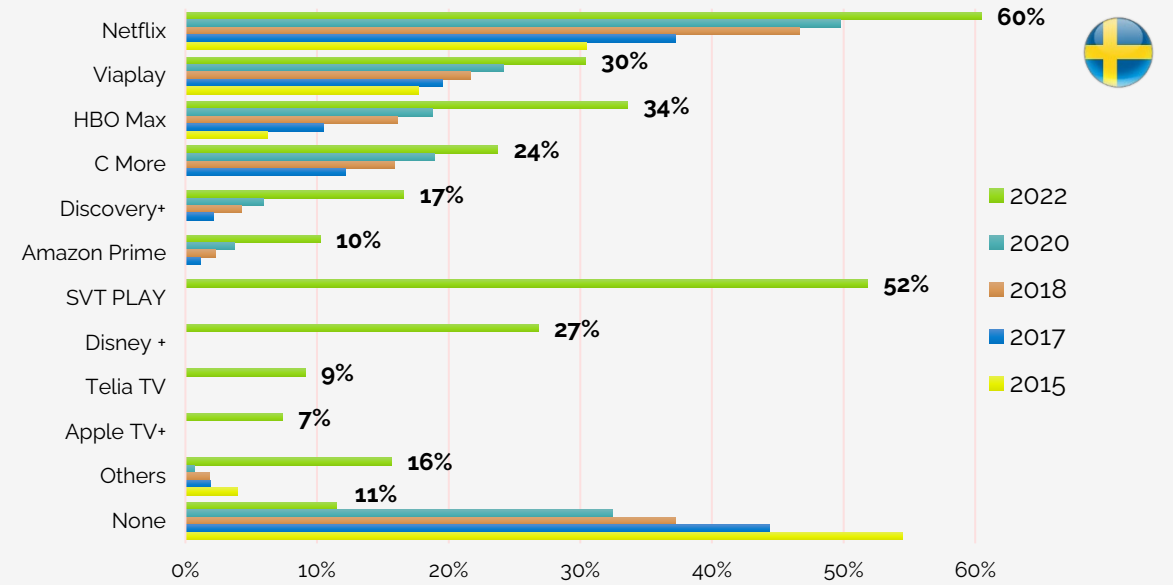
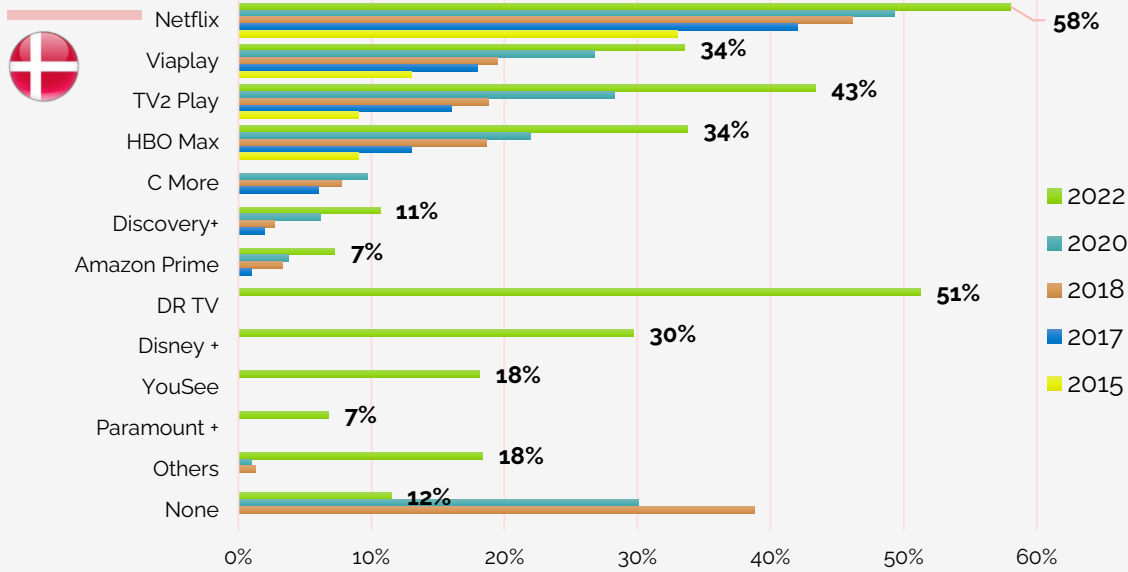


Q11 Do you currently subscribe to one or several of the following digital services providing TV and/or movie content?
Base: All

Note: Others = All Services in 2022 with 6% or below

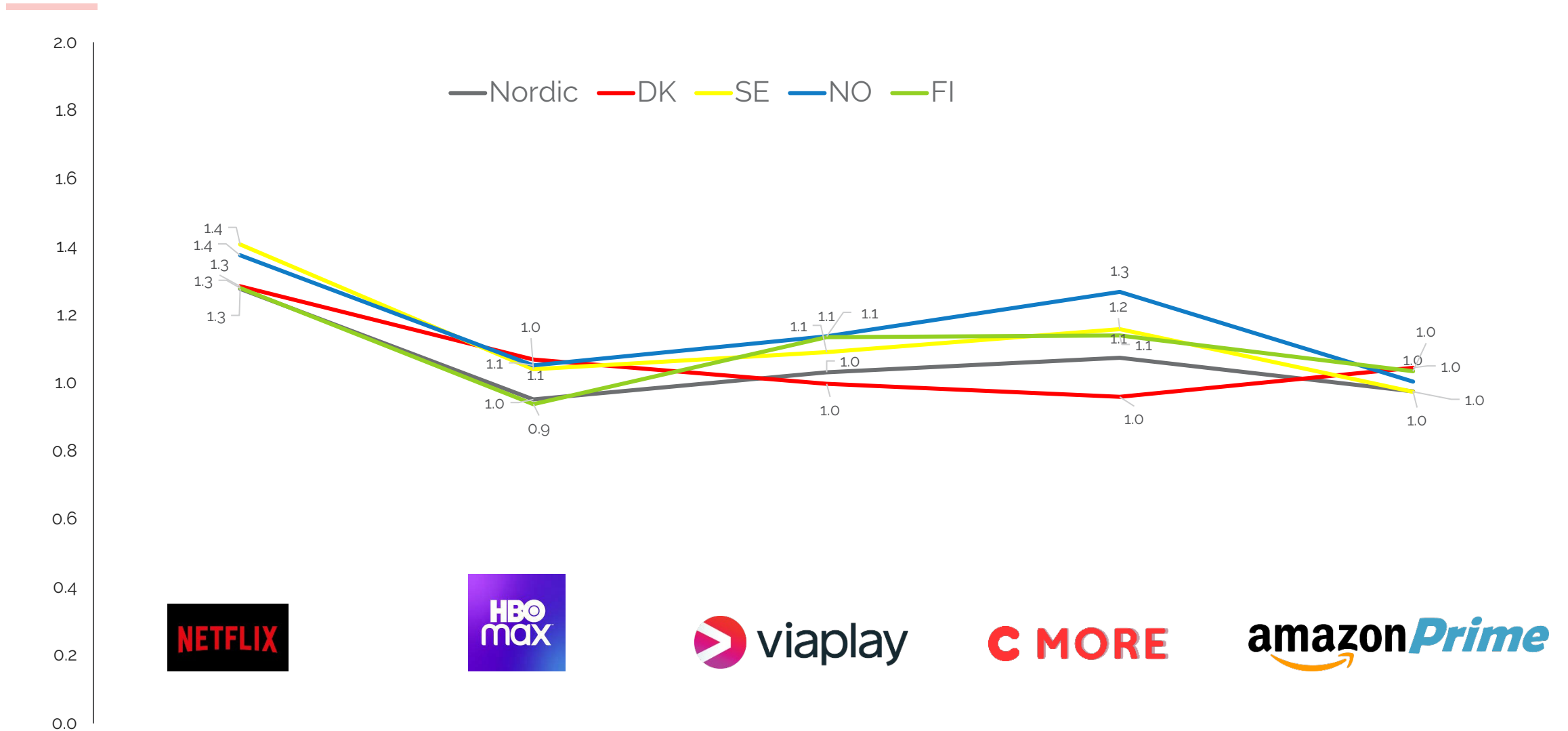
Streaming of TV/movie content - Nordic and countries

The national TV stations' share of streaming subscription is in some Nordic countries like Denmark and Sweden almost as large as e.g. Netflix



Daily time spent on streaming TV/movie content - Nordic and countries

On a Nordic level, e.g. excluding local public service providers, subscribers spend the most time per day on watching Netflix. Across the Nordics, C-More is the second most used in Sweden, Norway and Finland.



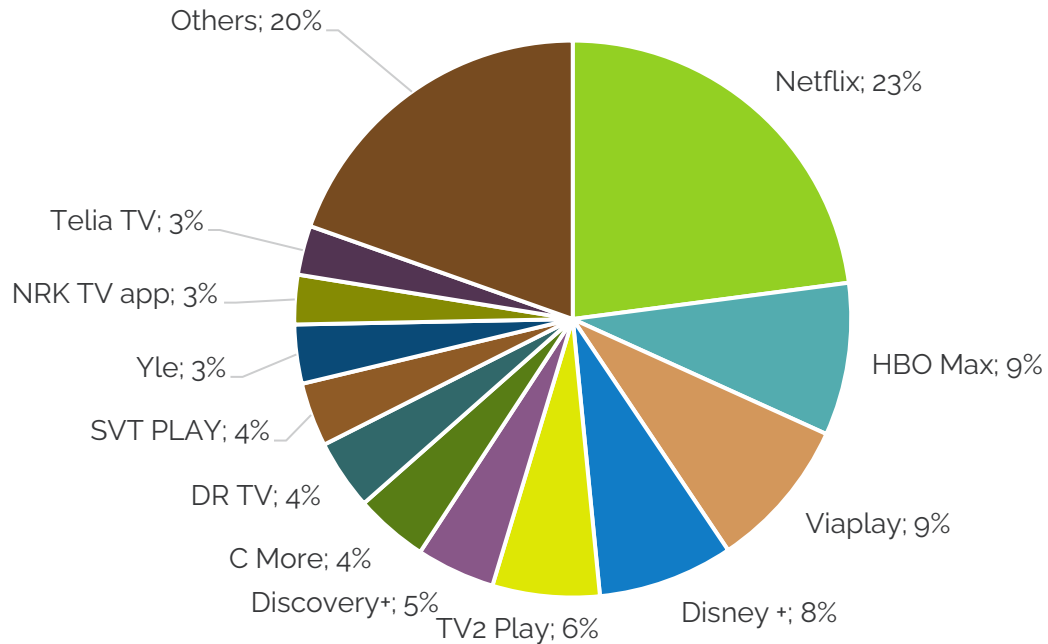
Q12b In a typical week, how many hours per day do you spend on watching TV/video content from the following services?
Base: Subscribers of the video streaming service

Daily time spent on streaming TV/movie content - Nordic overview

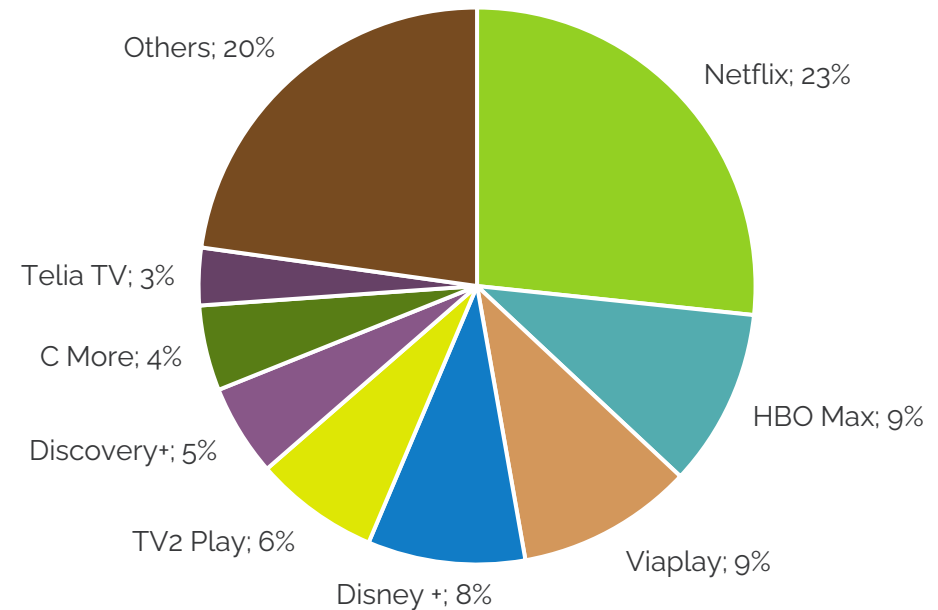
Across the Nordics, the trend in daily time spent on streaming TV/movie content is the same as from subscription: Netflix has by far the largest share and HBO, Viaplay and Disney+ is almost on par.

Nordic overview: Share of time spent on streaming of TV/movie content

All service providers



Commercial service providers

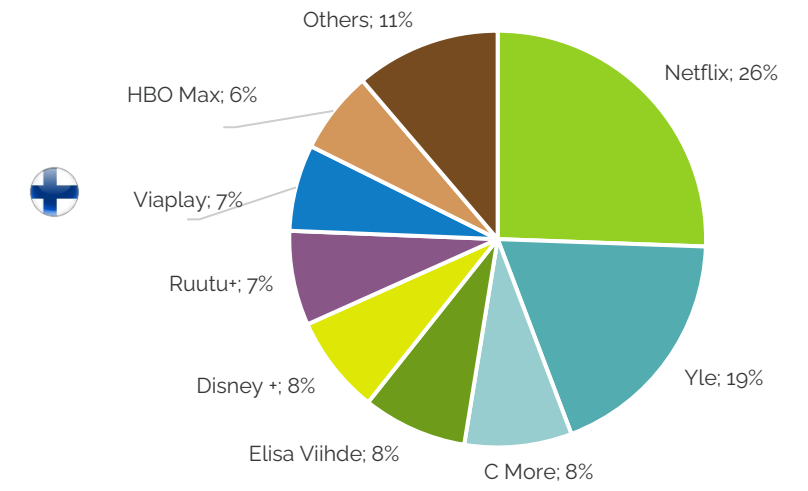
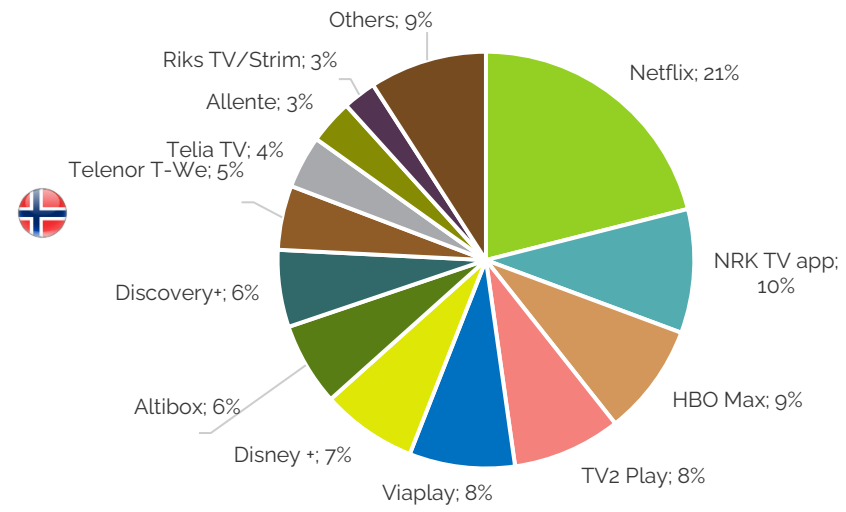
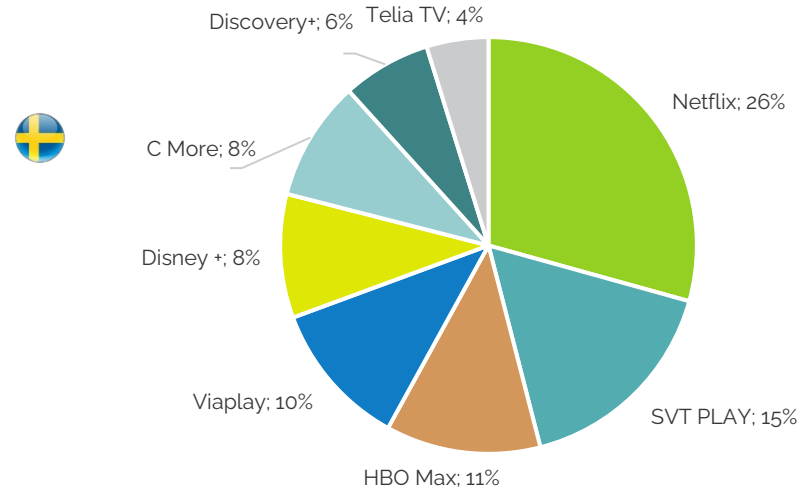
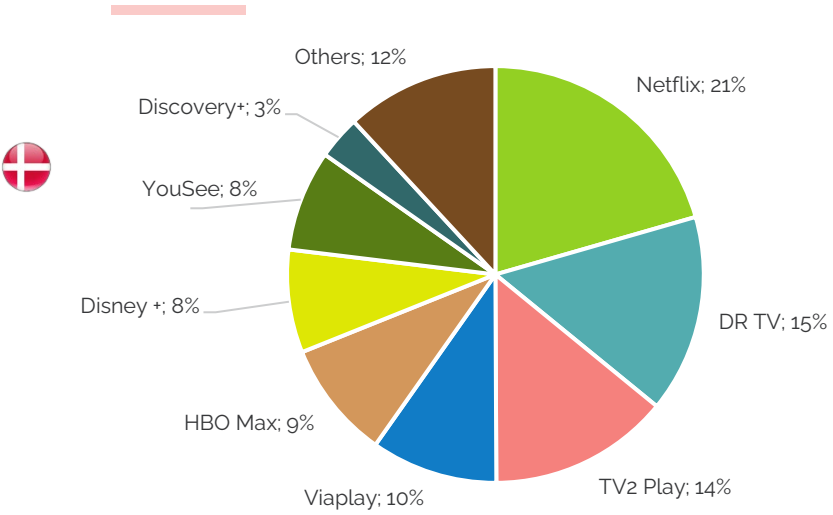


Q12b In a typical week, how many hours per day do you spend on watching TV/video content from the following services?
Base: Subscribers of the video streaming service

Note: Others = All Services with 3% or below share of daily time spend + the option "Other service"


Daily time spent on streaming TV/movie content - Countries

Netflix is a large Nordic player, while national public service providers are second measured on time spent. Excluding these, HBO Max is no. 2 in Sweden, Norway, while this applies to C-More in Finland and TV2 Play in Denmark



Q12b In a typical week, how many hours per day do you spend on watching TV/video content from the following services?
Base: Subscribers of the video streaming service

Note: Others = All Services with 3% or below share of daily time spend + the option "Other service"



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