POLARIS NORDIC

Digital Music in the Nordics

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YouGov

Content

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Purpose

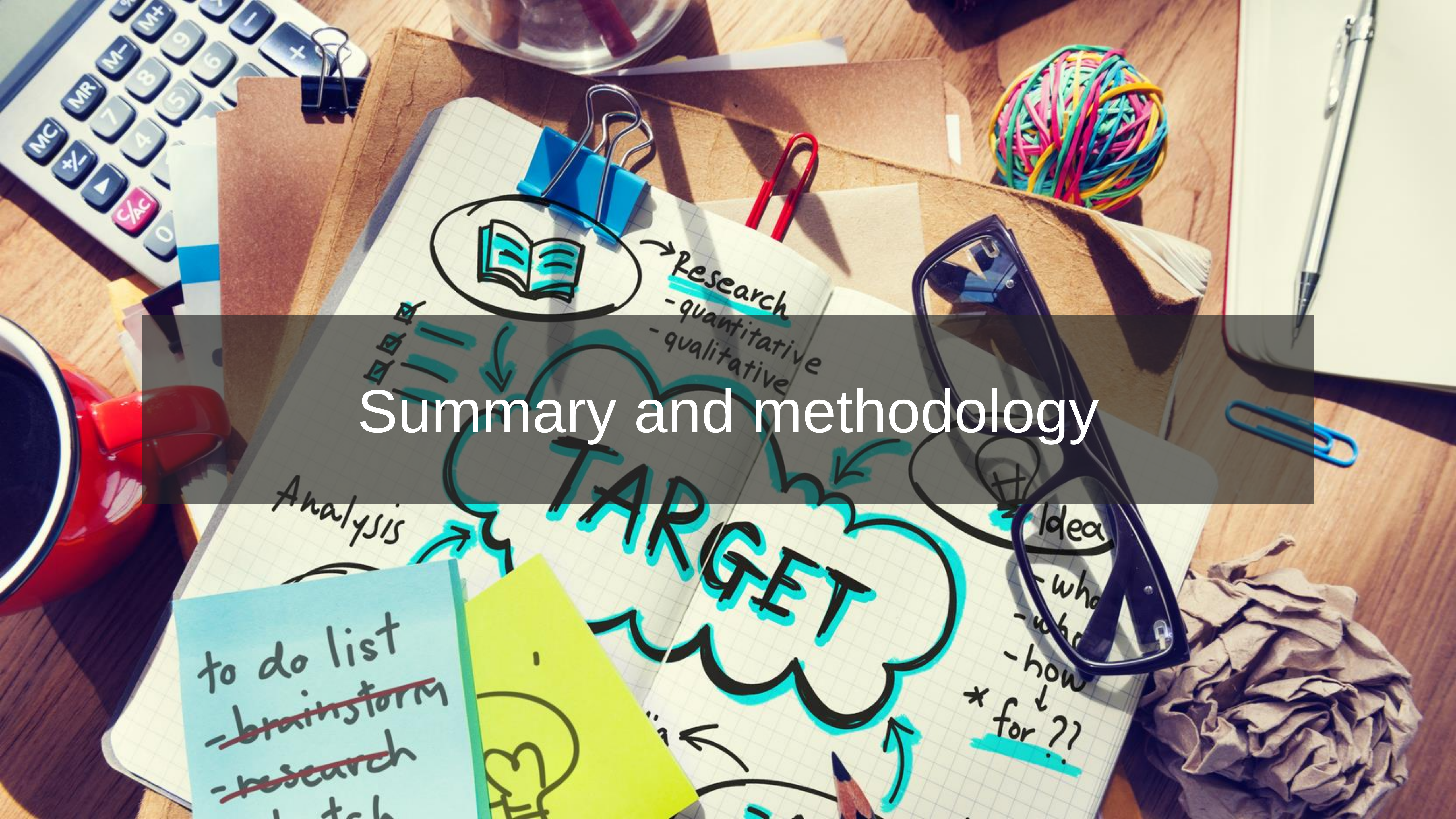
Purpose of study

Polaris Nordic (a collaboration between the three Nordic collecting societies 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.

This report highlights selected findings focusing on characterizing:

- The market for digital music services
- Behavior and attitude on music streaming – progress from 2015
- The profile of premium subscribers and profiles of free/trial version users (non paying users)
- The profile of people who stream music/music videos on Facebook
- The profile of people who stream music/music videos on YouTube

Summary and methodology



Summary and methodology

Sample
National representative sample in DK, NO, SE og FI
Men/women aged 15-65
Parents of children aged 12-14

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

Interviews
DK: 1.020 interviews
SE: 1.005 interviews
NO: 1.013 interviews
FI: 1.009 interviews

Field Period
April 20^{th} - May 13^{th} 2017

80%
Stream music
DK:75%
SE: 83%
NO: 81%
FI: 82%

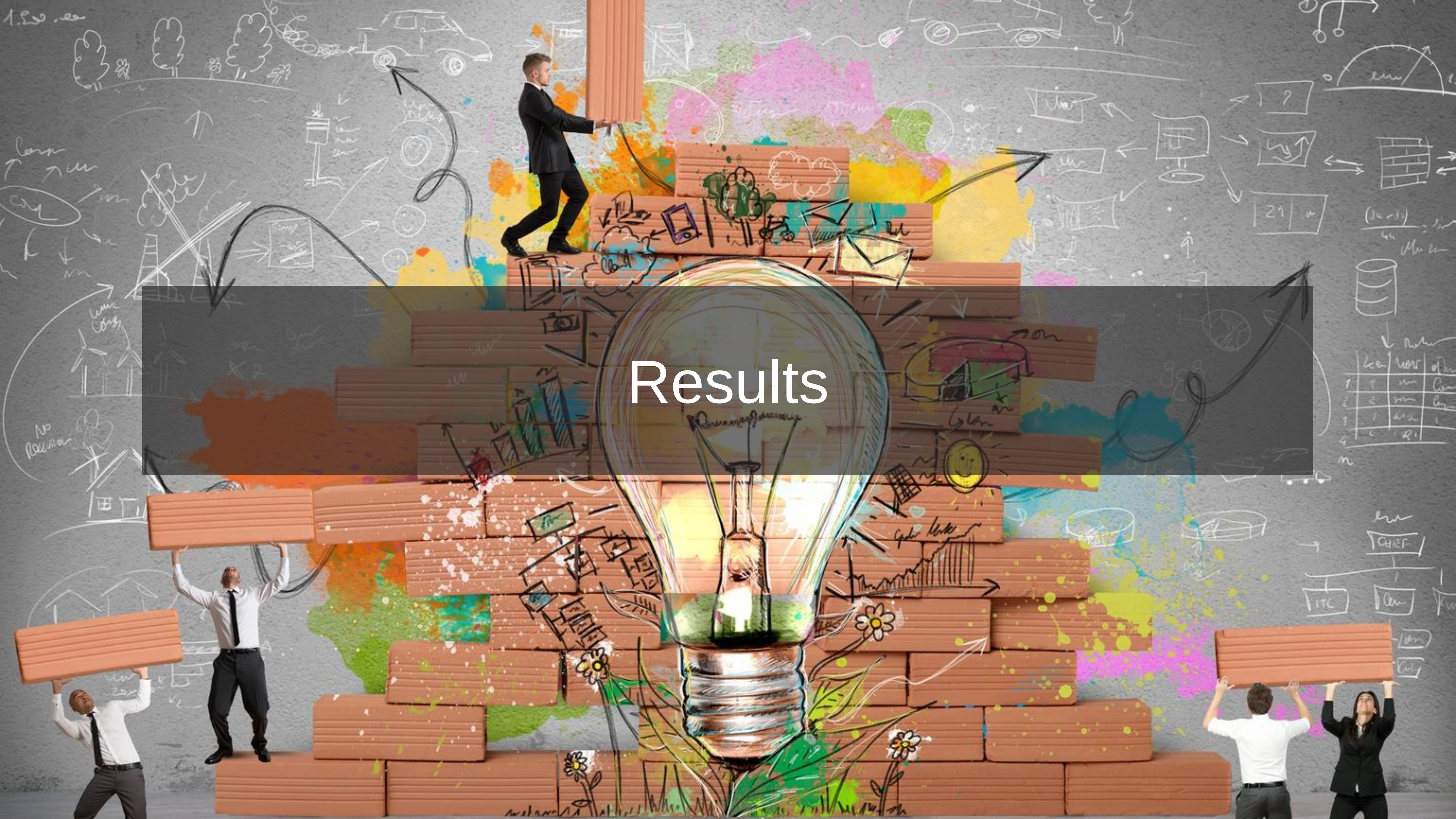
40%
Premium subscribers/Bundlers
DK: 43%
SE: 48%
NO: 48%
FI: 22%

35%
Streaming content with music on Facebook - weekly
DK: 35%
SE: 32%
NO: 40%
FI: 32%

42%
Streaming music on YouTube - weekly
DK: 32%
SE: 43%
NO: 45%
FI 50%

Digital Music Services 2018?

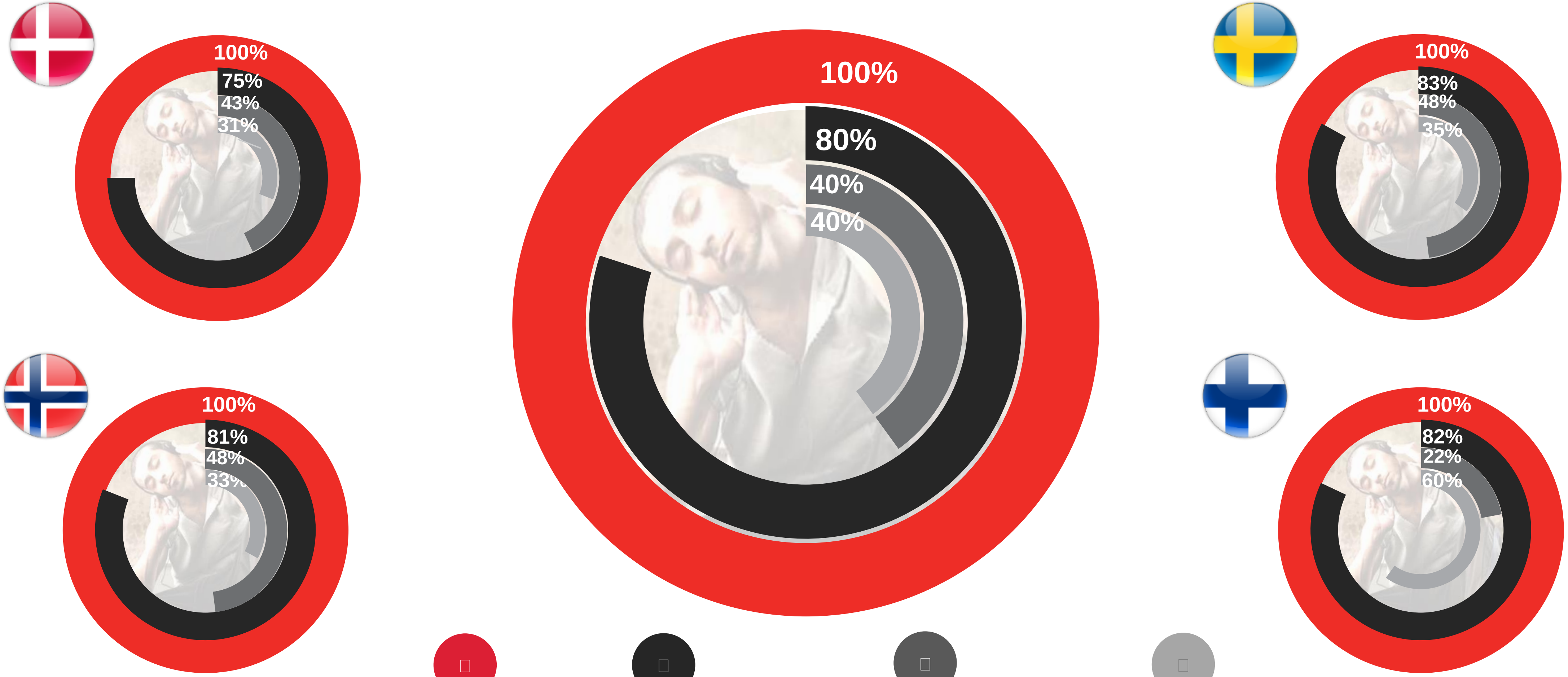
Results



Market overview

In each of the Nordic countries, 8 out of 10 use digital music services. The share of free/trial users is significantly higher in Finland than in the other Nordic countries

Nordic Market Overview



Total population

Users of digital music services

Subscribe to Premium/bundle

Telmore Musik, YouSee Musik, Spotify, Tidal, Apple Music, Google Play Music, Deezer, Groove, Napster, Beat.no, GubeMusic

Only free version/trial

YouTube, Soundcloud, Bandcamp, vidFlow, Spotify, Apple Music, Deezer, Google Play Music, Groove, Napster, Tidal,

Q7 In the past 12 months, have you personally used, or do you currently use any of the following digital music services (for music or music videos)?
Base: all

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Most used digital music services

In the Nordics, YouTube and Spotify are, beyond comparison, the most used digital music services and their market shares have increased significantly over the past two years with Spotify in Sweden as the only exception (status quo compared to 2015).

YouTube is the most used digital music service in Norway, Denmark and Finland (especially) whereas Spotify dominates the Swedish market (though closely followed by YouTube which has increased significantly whereas Spotify has not).

Compared to the other countries, Danes are less active users of both YouTube and Spotify, probably due to third place, Yousee Music, with a user share of 18%. In the other three countries, the third place is held by iTunes.

Top 3 - Nordic

- YouTube 60%
- Spotify 51%
- iTunes 13%

Top 3 (Denmark)

- YouTube 48% (37%) ↑
- Spotify 38% (33%) ↑
- Yousee Music 18% (21%)

Top 3 (Norway)

- YouTube 62% (46%) ↑
- Spotify 55% (50%) ↑
- iTunes 16% (24%) ↓

Top 3 (Sweden)

- Spotify 64% (64%)
- YouTube 60% (50%) ↑
- iTunes 13% (17%) ↓

Top 3 (Finland)

- YouTube 69% (55%) ↑
- Spotify 46% (38%) ↑
- iTunes 8% (8%)

Q7 In the past 12 months, have you personally used, or do you currently use any of the following digital music services (for music or music videos)?
Base: all

YouGov

Looking at users of Spotify and YouTube, three out of four use the services on a weekly basis. Spotify has a much larger daily user share than YouTube

Nordic weekly user frequency

Net: 77%
(daily/weekly)

Net: 73%	45% Daily	28% Weekly
Net: 79%	50% Daily	29% Weekly
Net: 77%	51% Daily	26% Weekly
Net: 76%	46% Daily	30% Weekly

Nordic weekly user frequency

Net: 71%
(daily/weekly)

Net: 66%	30% Daily	36% Weekly
Net: 71%	36% Daily	34% Weekly
Net: 73%	37% Daily	36% Weekly
Net: 72%	39% Daily	33% Weekly

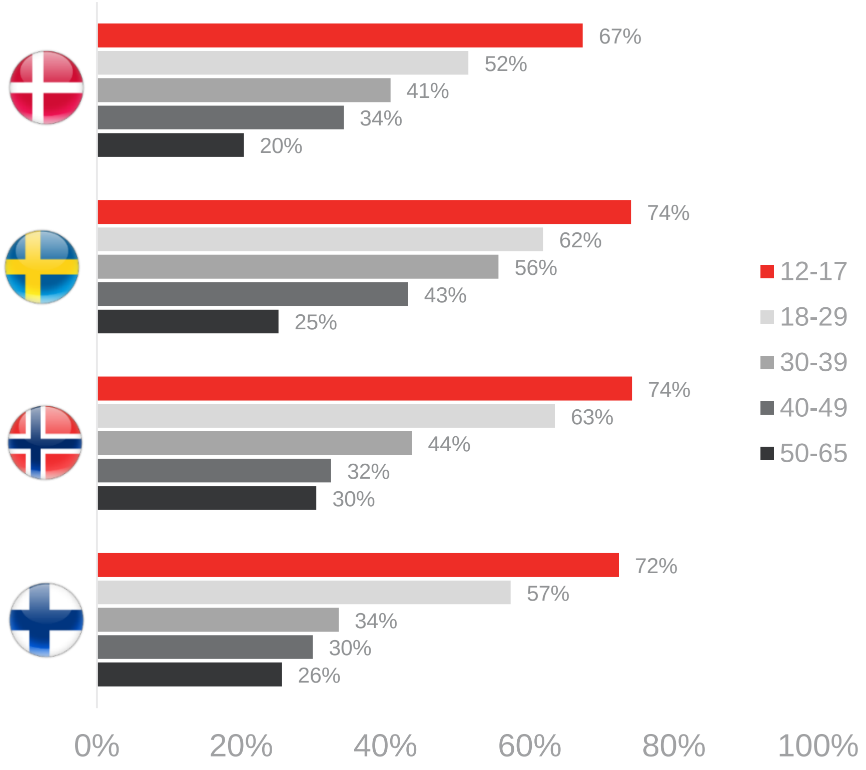
youSee Net: 65% 33% Daily 32% Weekly

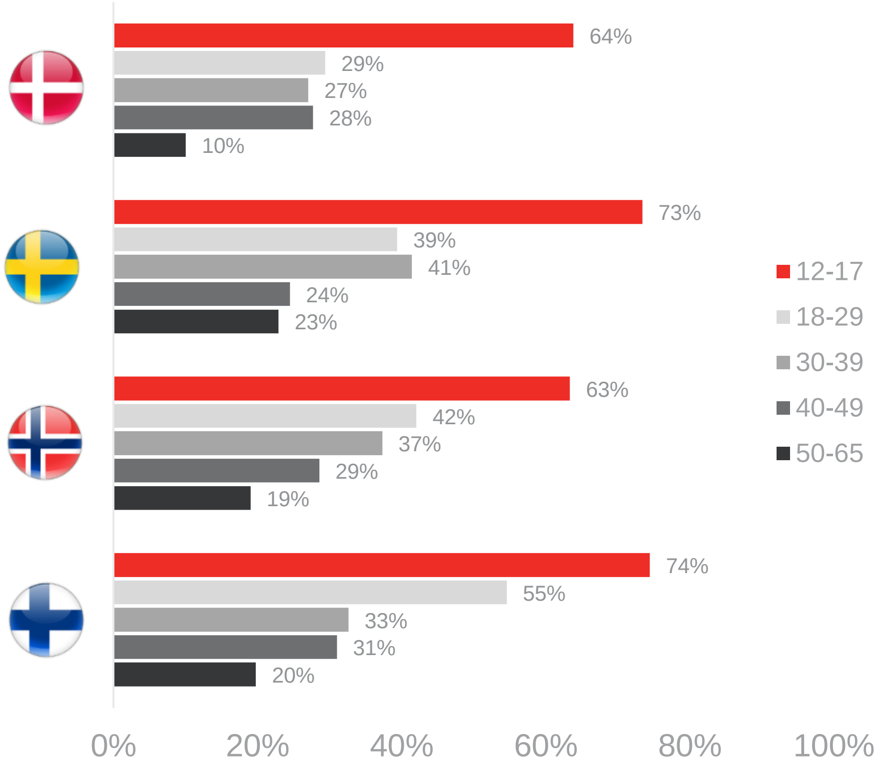
Q8 How often do you use the following service (for music or music videos)?
Base: Users of Spotify, users of YouTube, users of youSee Musik

YouGov

Share of daily users on Spotify and YouTube – by age

There's a similar patterns across the Nordic countries on daily streamers. There's a much higher share of young people who stream music daily on Spotify and YouTube





Q8 How often do you use the following service (for music or music videos)?
Base: Users of Spotify, users of YouTube

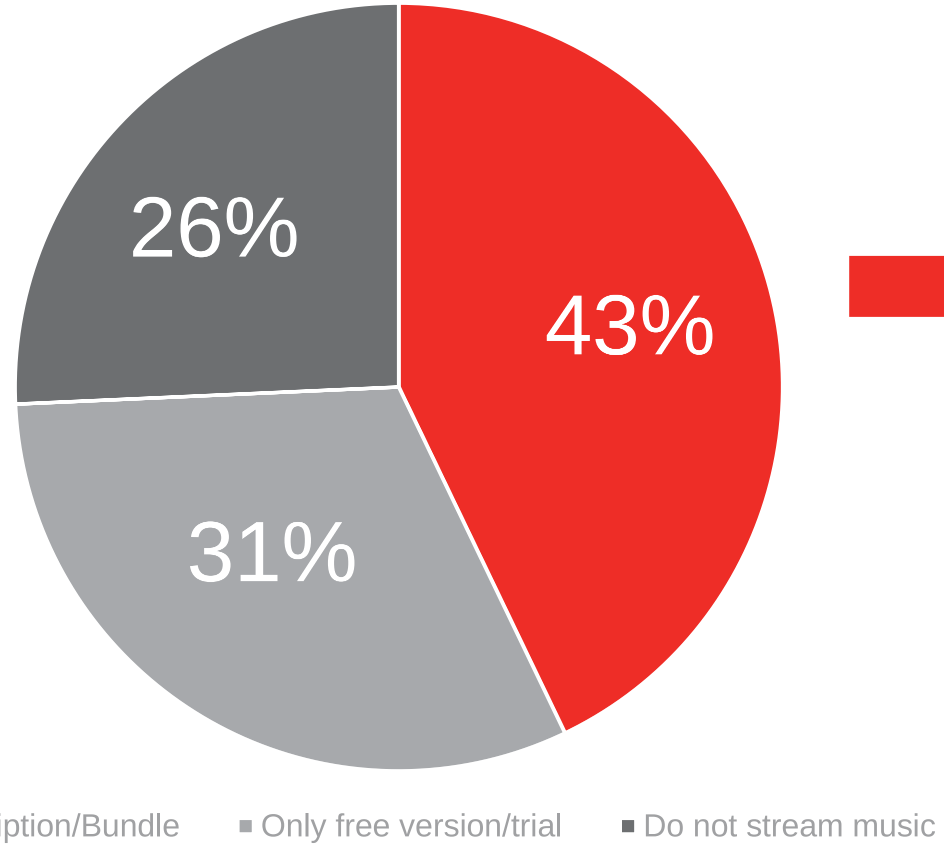
YouGov

Profiling users of digital music services

Profiling Denmark

More than 4 in out of 10 Danes subscribe to a premium or bundled music streaming service

Share of Danes who use at least one free music service: **68%**



We'll profile people who have access through

Premium subscription/bundles

Used services: Telmore Musik, YouSee Musik, Spotify, Tidal, Apple Music, Google Play Music, Deezer, Groove, Napster

We'll profile people who only use

Free version/trial version

Used services: YouTube, Soundcloud, Bandcamp, Spotify, Tidal, Apple Music, Google Play Music, Deezer, Groove, Napster

Q7 In the past 12 months, have you personally used, or do you currently use any of the following digital music services (for music or music videos)?
Base: All

Q9a Which version have you used in the past 12 months?
Base: Have used the service within last 12 months

Profiles on premium/bundled subscribers and free/trial users

RED: Premium subscribers/Bundles – 43%
GREY: Only Free version/Trial version – 31%

The arrows show significant demographic variations within each of the two user groups (*not variations between the two user groups)*

Gender

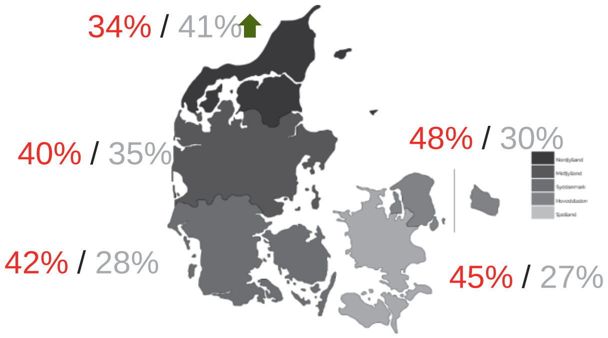
41%

33%

45%

29%

Region



Profile

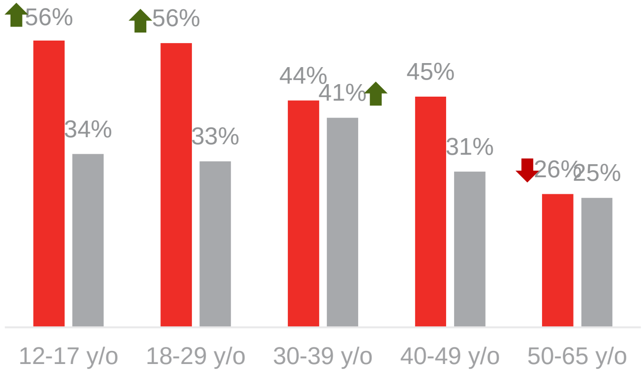
Demographics – Premium subscribers/bundlers
The group of Danes who have a premium/bundled streaming subscription is made up by significantly more young people aged 12-29 and has an overrepresentation of households with a high household income, student and office workers.

Demographics – only free/trial users
Region wise, significantly more people from Nordjylland stream for free or as trialists. The groups of free users/trialists is overrepresented by households with a low household income and people who are not in work.

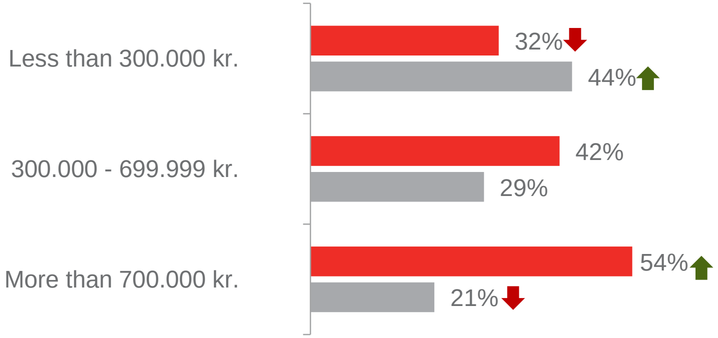
Behavior/attitudes
Compared to free/trial users, premium subscribers/bundlers:

- Are more frequent concertgoers
- Agree more that it's fair that artists are compensated when their music is used in online services
- Is more driven to choose a digital music service to be able to have access to all music (for free users/trialists the main driver is that a service is free)

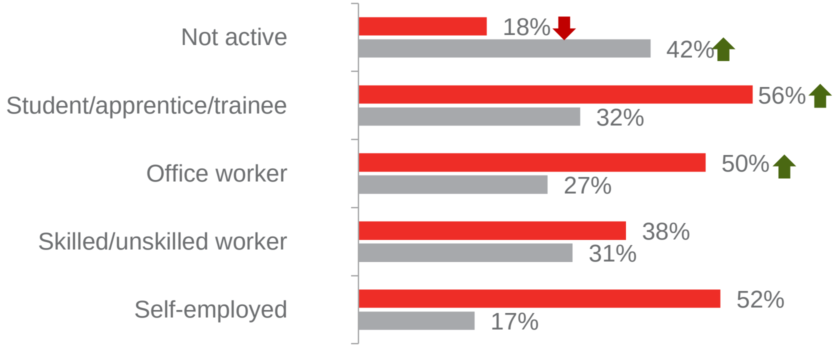
Age



Household income



Occupation



YouGov

Profiles on premium/bundled subscribers and free/trial users

RED: Premium subscribers/Bundles
GREY: Only Free version/Trial version

	Gone to a concert past 12 months	Average number of concerts past 12 months
RED	71% ⬆	3,36 ⬆
GREY	61%	2,73

Buy music

	Sub-scribers	Free/trial
Music downloads	19%	13%
CDs	12%	16%
Vinyl	9%	6%
Other formats	3%	4%
Don't buy music	**64%**	**67%**

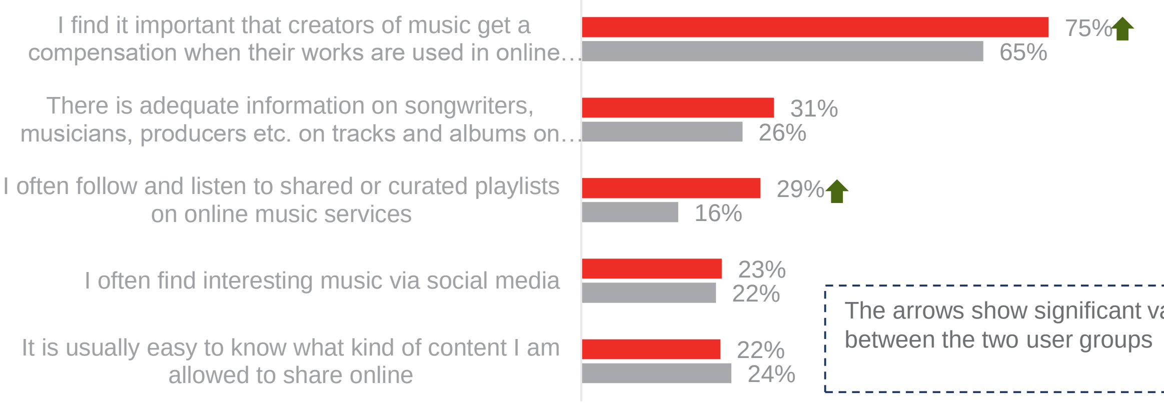
Top 3 music services

	Subscribers	Free/trials
Spotify	57% ⬆	42%
YouTube	52%	82% ⬆
yousee	42%	-

Top 5 drivers when choosing music service

RED		GREY	
That I have access to all the music I like	61% ⬆	That it's free	51% ⬆
That the service is legal	47% ⬆	That I have access to all the music I like	42%
That the sound is of high quality	43%	That the sound is of high quality	38%
Ease of use	42% ⬆	That the service is legal	36%
That the music can be easily used on multiple devices and platforms	36% ⬆	Ease of use	30%

Top 5 Statements
(agree/strongly agree)



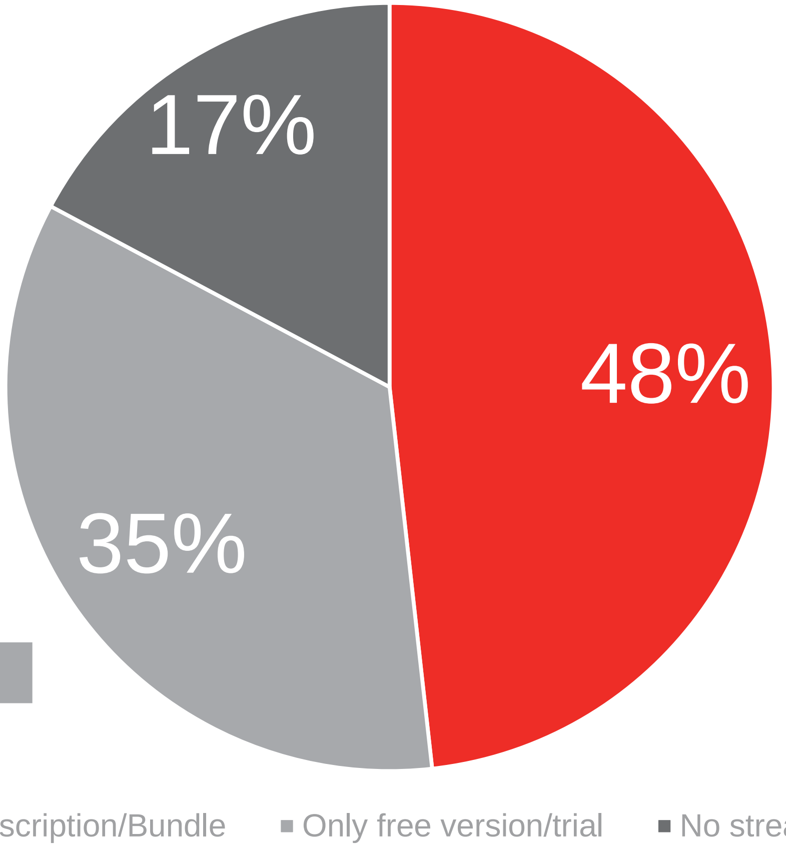
The arrows show significant variation between the two user groups

YouGov

Profiling Sweden

Profiles on premium/bundled subscribers and free/trial users on music streaming

Share of Swedes who use at least one free music service:
70%



We'll profile people who have access through

Premium subscription/bundles

Used services: Spotify, Tidal, Apple Music, Google Play Music, Deezer, Groove, Napster

We'll profile people who only use

Free version/Trial version

Used services: YouTube, Soundcloud, Bandcamp, Spotify, Tidal, Apple Music, Google Play Music, Deezer, Groove, Napster

Q7 In the past 12 months, have you personally used, or do you currently use any of the following digital music services (for music or music videos)?
Base: All

Q9a Which version have you used in the past 12 months?
Base: Have used the service within last 12 months

Profiles on premium/bundled subscribers and free/trial users

RED: Premium subscribers/Bundles – 48%
GREY: Only Free version/trial version – 35%

The arrows show significant demographic variations within each of the two user groups (*not variations between the two user groups*)

Gender

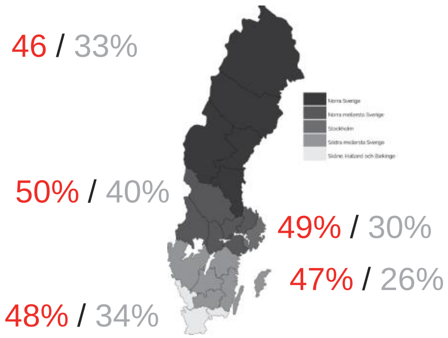
45%

36%

52%

33%

Region



Profile

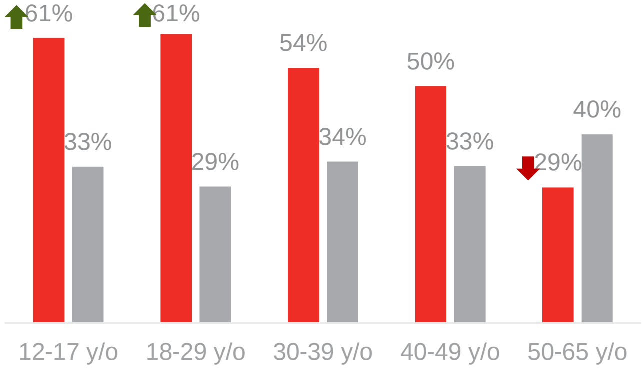
Demographics – Premium subscribers/bundlers
Swedes who have who have a premium/bundled streaming subscription is made up by significantly more males, young people aged 12-29 and has an overrepresentation of households with a high household income, student and office workers.

Demographics – Only free/trial users
Swedish music streamers who use a free/trial version are overrepresented by people with low household incomes and people who are not active.

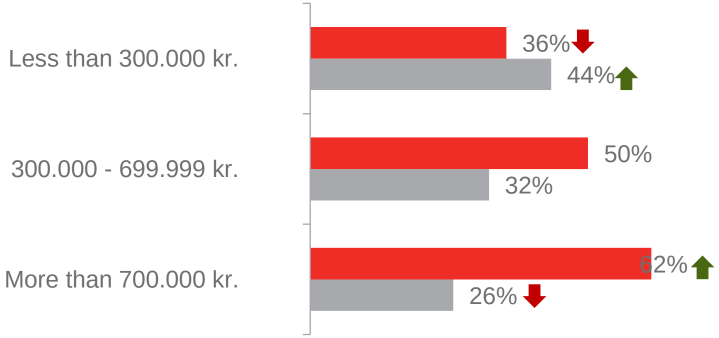
Behavior/attitudes
Compared to free/trial users, premium subscribers/bundlers are characterized by:

- A higher share who goes to concerts annually and they are more frequent concertgoers
- Agree more that it's fair that artists are compensated when their music is used in online services
- Close to 100% who use Spotify
- Is more driven to choose a digital music service to be able to have access to all the music they like (for free users/trialists the main driver is that a service is free).

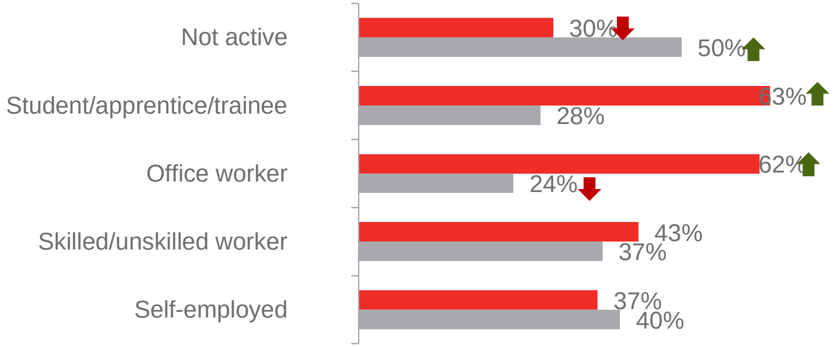
Age



Household income



Occupation



YouGov

Profiles on premium/bundled subscribers and free/trial users

RED: Premium subscribers/Bundles
GREY: Only Free version/trial version

	Gone to a concert past 12 months	Average number of concerts past 12 months
RED	65% ↑	3,27 ↑
GREY	48%	2,64

Buy music

	Sub-scribers	Free/Trial
Music downloads	19%	11%
CDs	14%	19%
Vinyl	7%	7%
Other formats	4% ↑	1%
Don't buy music	**62%**	**66%**

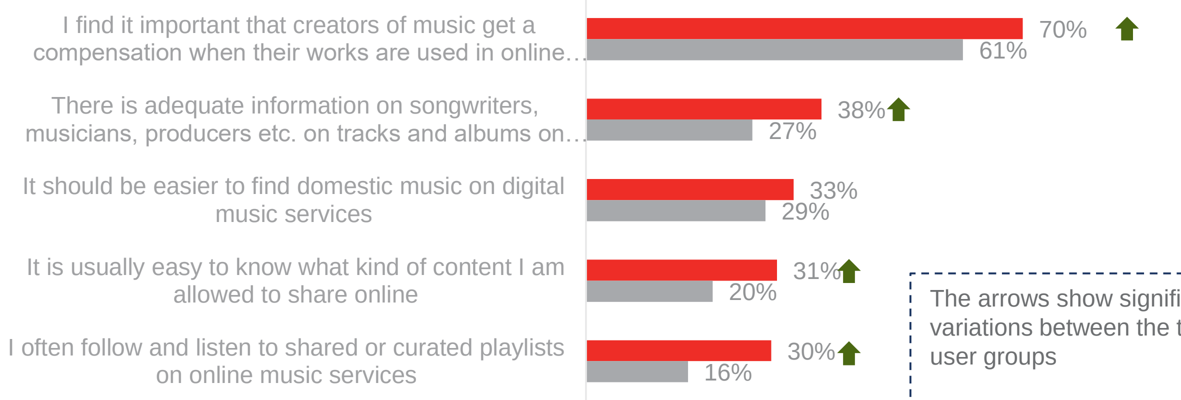
Top 3 services

	Subscribers	Free/trial
Spotify	↑ 96%	48%
YouTube	66%	83% ↑
iTunes	15%	14%

Top 5 drivers when choosing music service

RED: Premium subscribers/Bundles		GREY: Only Free version/trial version	
↑ That I have access to all the music I like	63%	That it's free	50% ↑
↑ Ease of use	55%	Ease of use	39%
↑ That the sound is of high quality	44%	That I have access to all the music I like	34%
↑ That the music can be easily used on multiple devices and platforms	43%	That the sound is of high quality	28%
That the service is legal	31%	That the service is legal	27%

Statements



The arrows show significant variations between the two user groups

YouGov

Profiling Norway

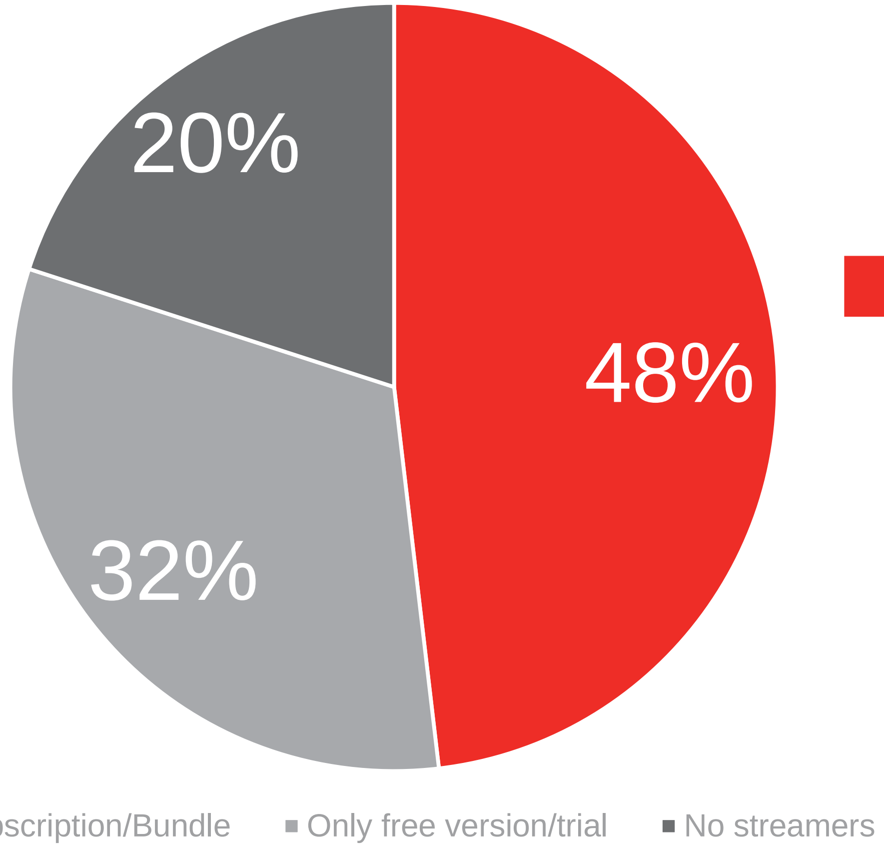
Almost half of Norwegians subscribe to a premium or bundled streaming service

Share of Norwegians who use at least one free music service:
71%

We'll profile people who only use

Free version/trial version

Used services: YouTube, Soundcloud, Bandcamp, vidFlow, Spotify, Tidal, Apple Music, Google Play Music, Deezer, Groove, Napster, vidFlow



We'll profile people who have access through

Premium subscription/bundles

Used services: Spotify, Tidal, Apple Music, Google Play Music, Deezer, Groove, Napster, Beat.no, GubeMusic

Q7 In the past 12 months, have you personally used, or do you currently use any of the following digital music services (for music or music videos)?
Base: All

Q9a Which version have you used in the past 12 months?
Base: Have used the service within last 12 months

Profiles on premium/bundled subscribers and free/trial users

The arrows show significant demographic variations within each of the two user groups (*not variations between the two user groups)*

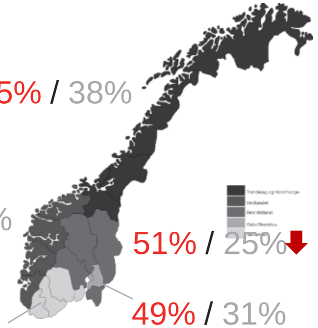
RED: Premium subscribers/Bundles – 48%
GREY: Only Free version/trial version – 32%

Gender

46%
34%

50%
32%

Region



Profile

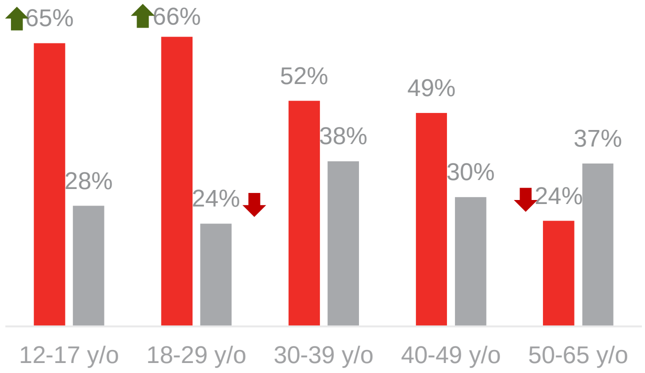
Demographics – Premium subscribers/bundlers
Premium subscribers/bundlers is overrepresented by more young people aged 12-29, households with a high household income and students.

Demographics – Only free/trial users
The group of free/trial users is significantly less represented by young people aged 18-29 and people from Eastern Norway. The group is overrepresented by people who are not in work.

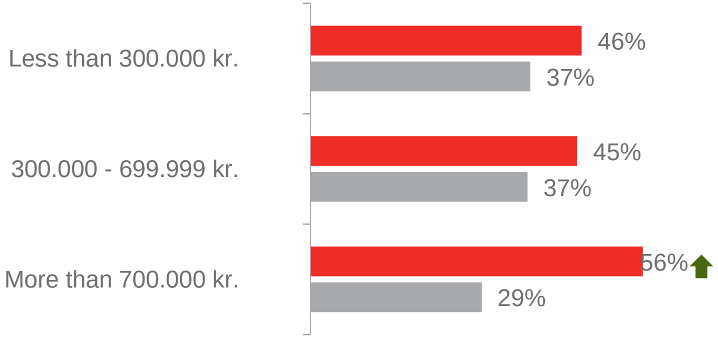
Behavior/attitudes
Compared to free/trial users, premium subscribers/bundlers are:

- More annually concertgoers
- Buy more music downloads and vinyls
- To a greater extent use Spotify (while free users/trialists to a greater extent use YouTube)
- Agree more that it's fair that artists are compensated when their music is used in online services
- Is more driven to choose a digital music service to be able to have access to all the music they like

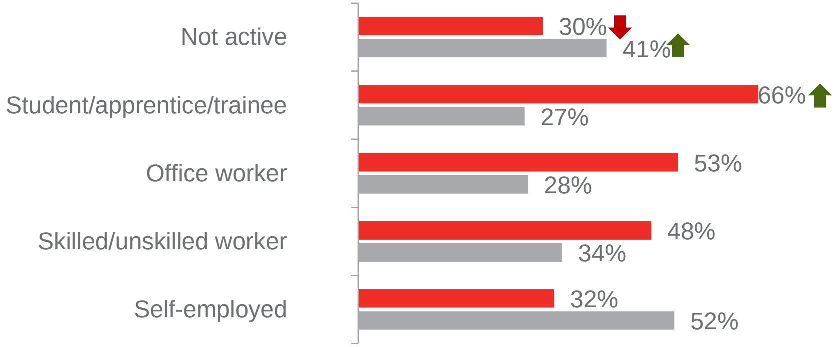
Age



Household income



Occupation



Profiles on premium/bundled subscribers and free/trial users

RED: Premium subscribers/Bundles
GREY: Only Free version/trial version

	Gone to a concert past 12 months	Average number of concerts past 12 months
Premium subscribers/Bundles	71% ↑	3,42
Free version/trial version	54%	3,11

Buy music

	Sub-scribers	Free/trial
Music downloads	28% ↑	17%
CDs	19%	23%
Vinyl	11%	7%
Other formats	4%	4%
Don't buy music	**52%**	**56%**

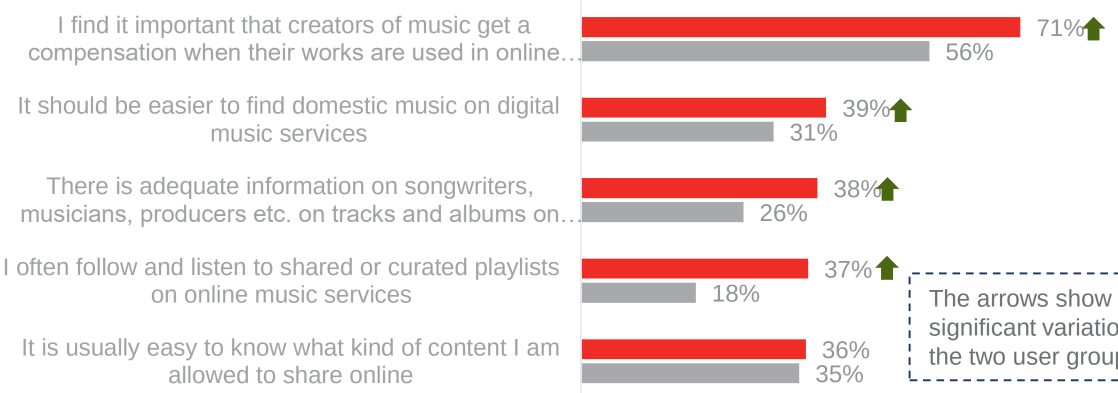
Top 3 services

	Subscribers	Free/trials
Spotify	↑ 85%	42%
YouTube	70%	86% ↑
iTunes	20%	17%

Top 5 drivers when choosing music service

Subscribers		Free/trial	
That I have access to all the music I like	67% ↑	That it's free	49% ↑
Ease of use	51% ↑	That I have access to all the music I like	38%
That the sound is of high quality	49% ↑	Ease of use	38%
That the music can be easily used on multiple devices and platforms	44% ↑	That the sound is of high quality	29%
That the service is legal	41% ↑	That the service is legal	28%

Top 5 Statements
(agree/strongly agree)



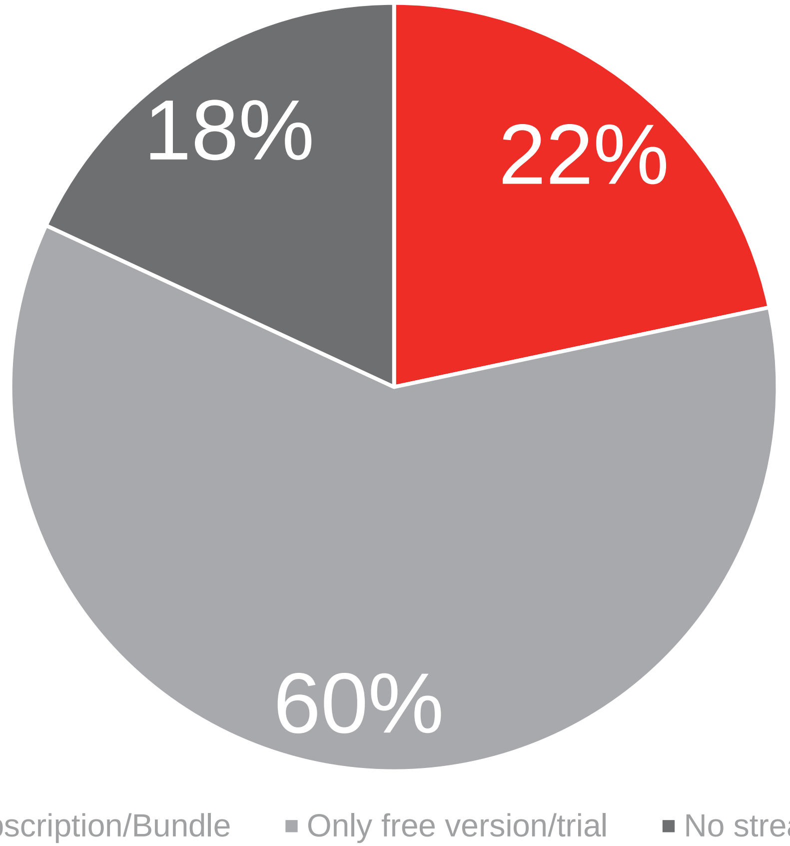
The arrows show significant variations between the two user groups

YouGov

Profiling Finland

Less than 1 out of 4 Finns pay for a premium/bundled subscription for a music service

Share of Finns who use at least one free music service: **77%**



We'll profile people who have access through

Premium subscription/bundles

Used services: Spotify, Tidal, Apple Music, Google Play Music, Deezer, Groove

We'll profile people who only use

Free version/trial version

Used services: YouTube, Soundcloud, Bandcamp, Spotify, Tidal, Apple Music, Google Play Music, Deezer, Groove

Q7 In the past 12 months, have you personally used, or do you currently use any of the following digital music services (for music or music videos)?
Base: All

Q9a Which version have you used in the past 12 months?
Base: Have used the service within last 12 months

YouGov

Profiles on premium/bundled subscribers and free/trial users

The arrows show significant demographic variations within each of the two user groups (*not variations between the two user groups)*

RED: Premium subscribers/Bundles – 22%
GREY: Only Free version/trial version – 60%

Gender

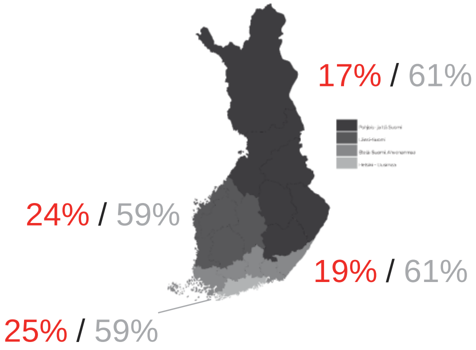
19%

63%

24%

58%

Region



Profile

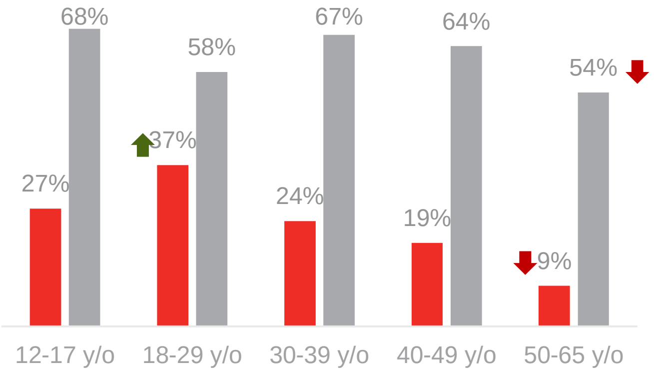
Demographics – Premium subscribers/bundlers
Premium subscribers/bundlers is overrepresented by more young people aged 12-29, and students households with a high household income, students and households with a high household income. High household income is probably *the* most defining demographic as more than twice as many households with a household income of more than 94.500 Euros are premium subscribers /bundlers compared to the average.

Demographics – Only free/trial users
The group of free/trial users has an overrepresentation of households with a low household income.

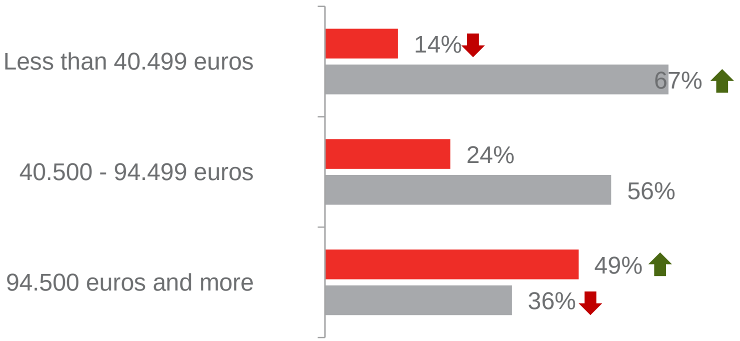
Behavior/attitudes
Compared to free/trial users, premium subscribers/bundlers:

- Are more frequent annually concertgoers
- Buy more music downloads and vinyls
- To a greater extent use Spotify (while free users/trialists to a greater extent use YouTube)
- Agree more that it's fair that artists are compensated when their music is used in online services
- Is more driven to choose a digital music service to be able to have access to all the music they like (for free users/trialists the main driver is that a service is free)

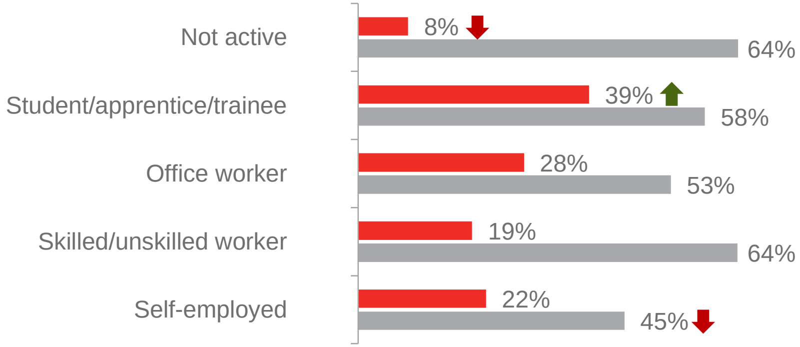
Age



Household income



Occupation



YouGov

Profiles on premium/bundled subscribers and free/trial users

RED: Premium subscribers/Bundles
GREY: Only Free version/trial version

	Gone to a concert past 12 months	Average number of concerts past 12 months
RED	74%	3,32
GREY	56%	2,96

Buy music

	Sub-scribers	Free/trial
Music downloads	34%	8%
CDs	25%	22%
Vinyl	11%	5%
Other formats	9%	3%
Don't buy music	**45%**	**66%**

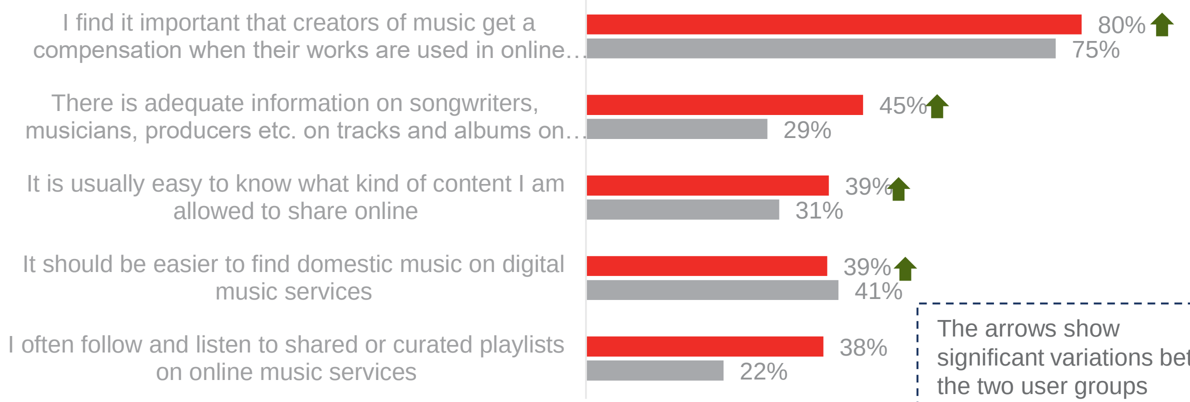
Top 3 services

	Subscribers	Free/trials
Spotify	89%	44%
YouTube	70%	90%
iTunes	17%	7%

Top 5 drivers when choosing music service

RED		GREY	
That I have access to all the music I like	58%	That it's free	56%
Ease of use	57%	Ease of use	43%
That the sound is of high quality	49%	That the service is legal	38%
That the service is legal	46%	That I have access to all the music I like	33%
That the music can be easily used on multiple devices and platforms	45%	That the sound is of high quality	31%

Top 5 Statements
(agree/strongly agree)



The arrows show significant variations between the two user groups

YouGov


Behavior and attitudes

On average, Norwegian concertgoers attend more concerts than Danish, Swedish and Finnish concertgoers

Significant changes from 2015 to 2017

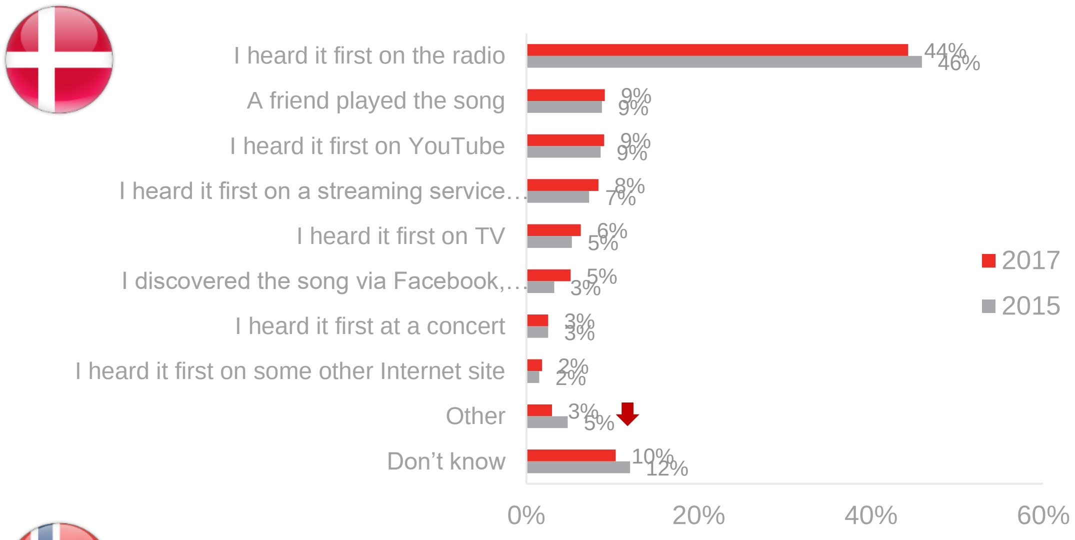
					
Gone to a concert in the past 12 months	**(2017)**	**62%**	**55%**	**60%**	**57%**
	(2015)	(63%)	(52%)	(57%)	(52%)
Average number of concerts the past 12 months	**(2017)**	**3,01**	**2,98**	**3,31**	**3,07**
	(2015)	(3,20)	(3,20)	(3,19)	(3,27)

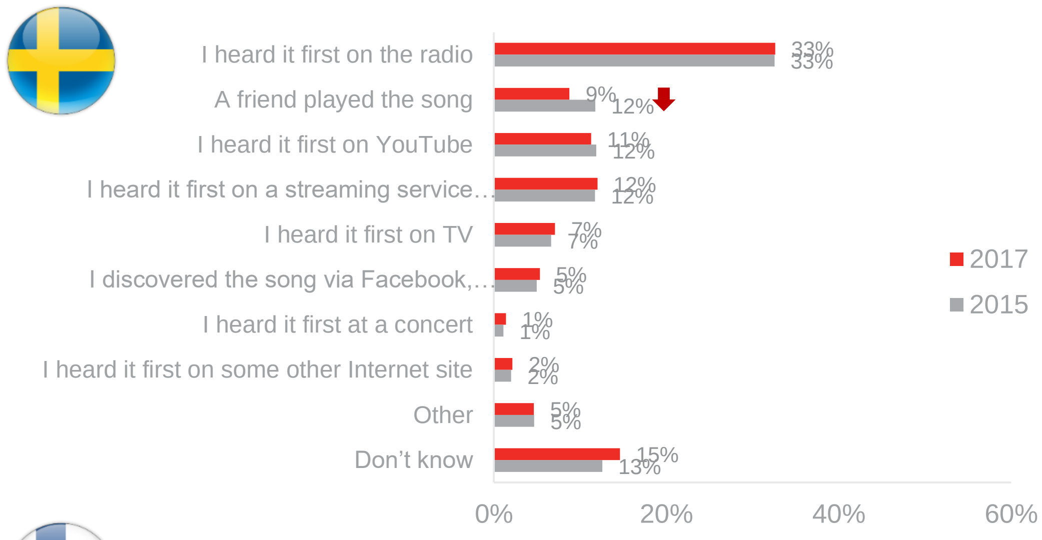
Q3 In the past 12 months, have you been to a concert, music festival or other live music event or musical performance?
Base: All

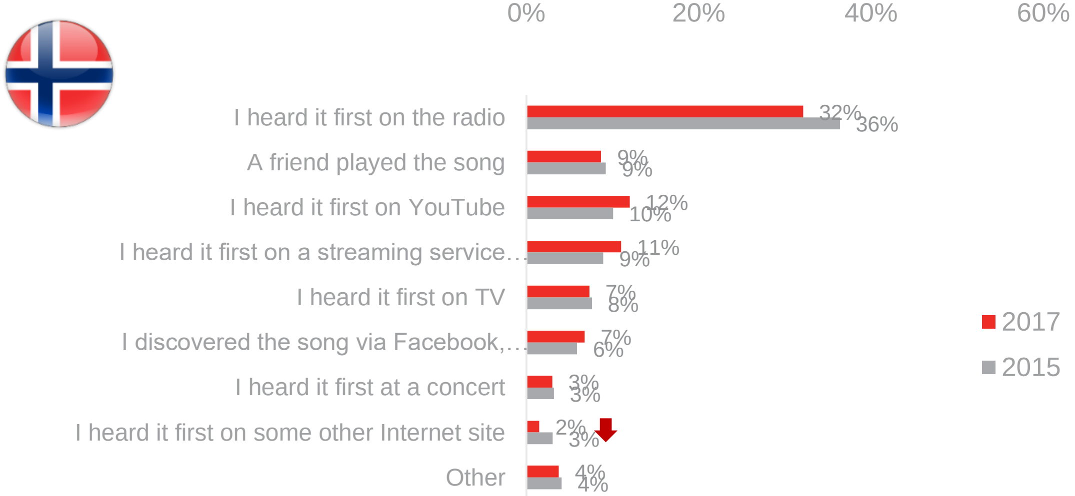
YouGov

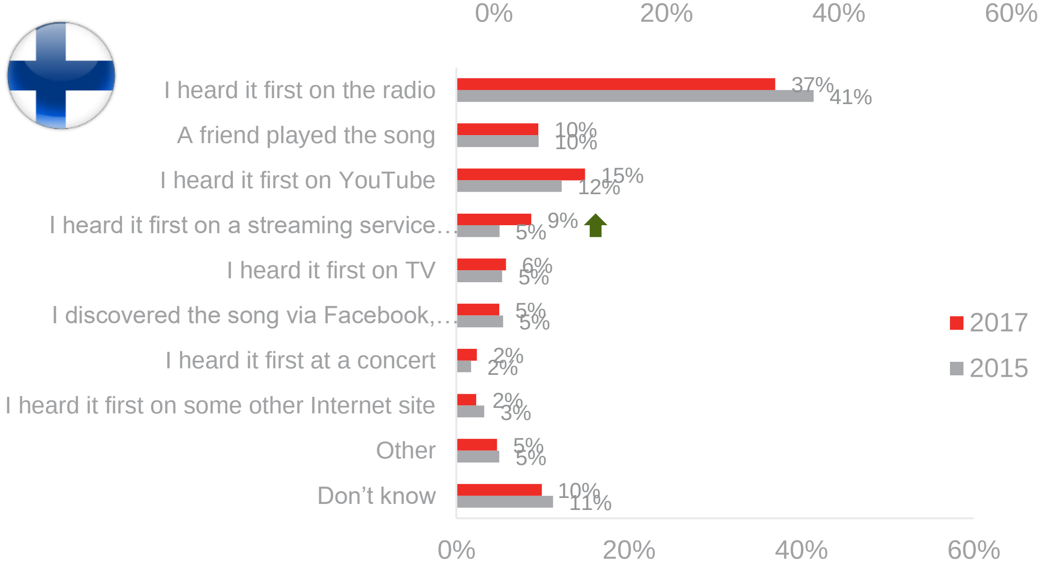
The radio is the best way to discover new songs

Significant changes from 2015 to 2017





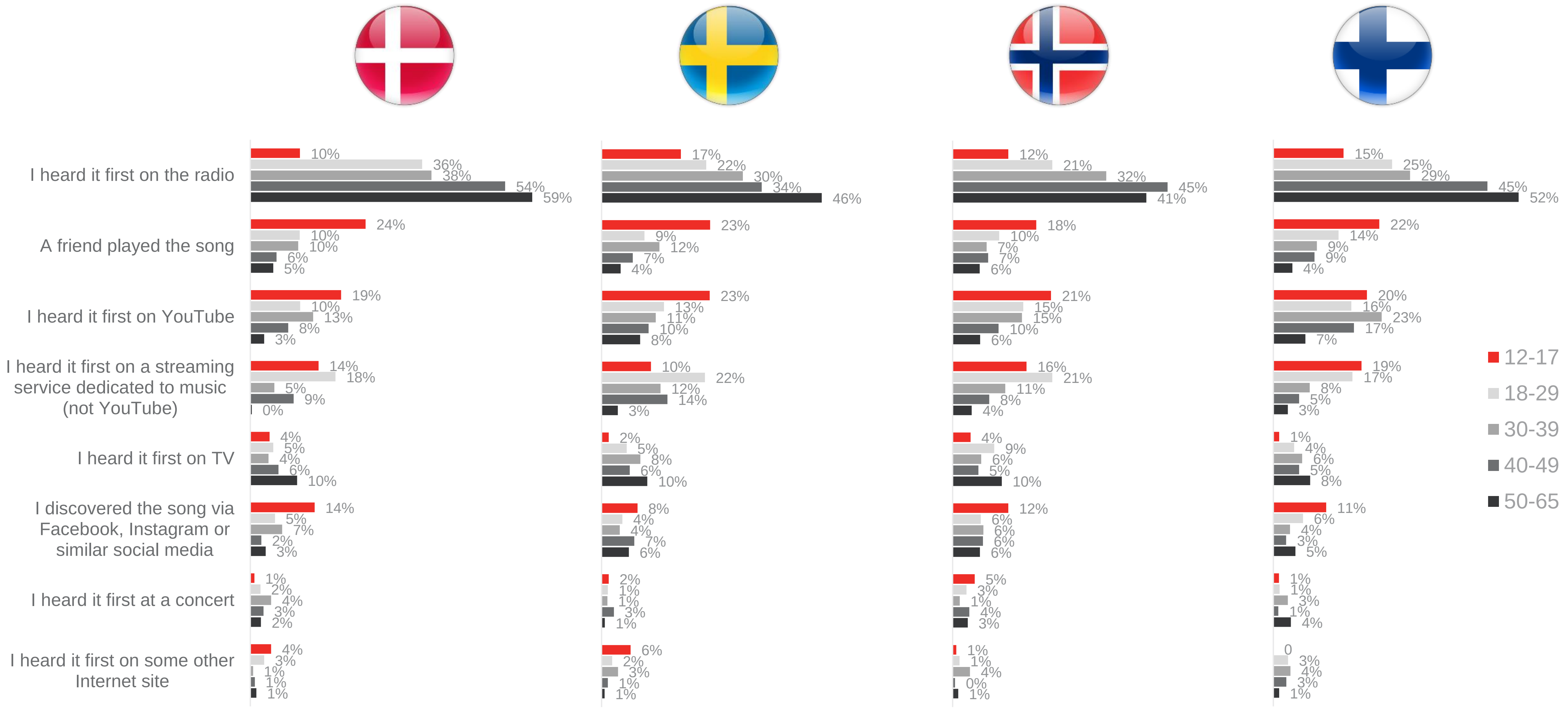




Q21 Think back to the last time you discovered a new song/piece of music you really liked: how did you discover it?
Base: All

YouGov

The radio is primarily used to discover new music by people over 40 years old. Young people discover new music through friends, on streaming service, on YouTube and on social media

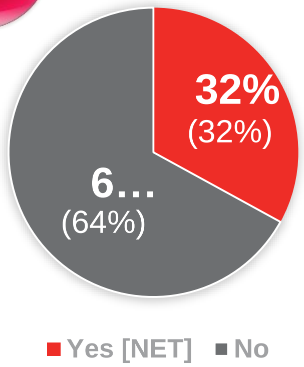


Q21 Think back to the last time you discovered a new song/piece of music you really liked: how did you discover it?
Base: All

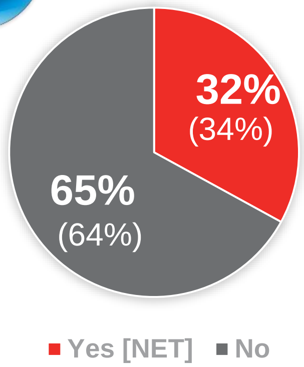
YouGov

Norwegians buy more music than to the other Nordic populations

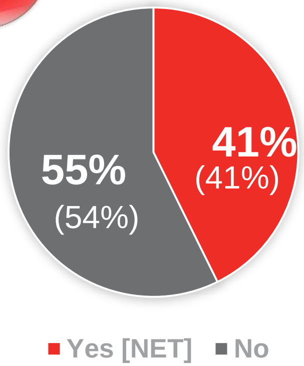
Significant changes from 2015 to 2017 ↓↑



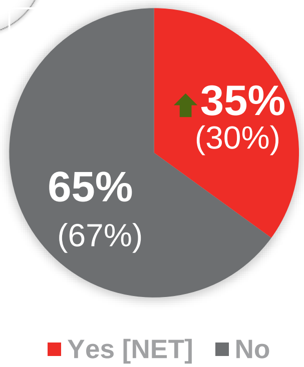
	2017	2015
Music downloads	15%	14%
CDs	15% ↓	19%
Vinyl	7%	4%
Other formats	3%	2%



	2017	2015
Music downloads	15%	14%
CDs	16%	17%
Vinyl	7%	6%
Other formats	2%	3%



	2017	2015
Music downloads	20%	23%
CDs	20%	19%
Vinyl	8%	9%
Other formats	4%	4%

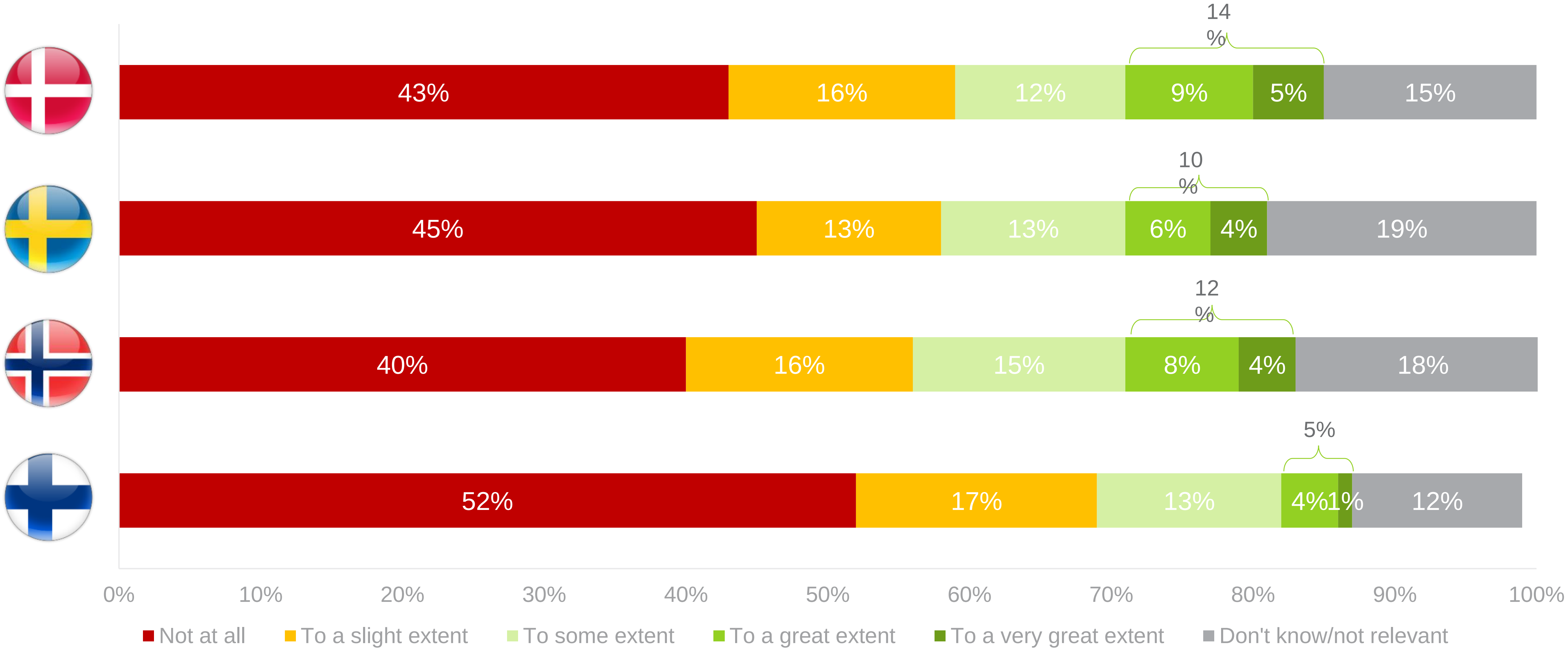


	2017	2015
Music downloads	13%	10%
CDs	22%	22%
Vinyl	6% ↑	3%
Other formats	4% ↑	2%

Q6 In the past 12 months, have you purchased music downloads, or music in a physical format, such as CDs or vinyl albums?
Base: All

YouGov

Overall, few find it important to get music services included when they decide on a mobile or internet subscription. Danes find it most important and Finns the least



Q10a To what extent did you find the possibility to get music services included important, when you decided which mobile or internet subscription to buy?
Base: All

Approximately, half of the Nordic populations (and more Finns) agree that it would be fair for Facebook to pay some of its revenue to the songwriters/performers being played on Facebook. In Denmark, an increasing number of Danes agree with the statement

Significant changes from 2015 to 2017
Subscribers/bundlers vs. free users/trialists

Agree/Strongly agree
2017: 44%
2015: 39%

Subscribers/bundlers: 46%
Free users/trialists: 46%

Agree/Strongly agree
2017: 45%
2015: 44%

Subscribers/bundlers: 50%
Free users/trialists: 41%

It would be fair if Facebook paid some of their revenue to the songwriters and performers of the music you can find on Facebook.

Agree/Strongly agree
2017: 41%
2015: 39%

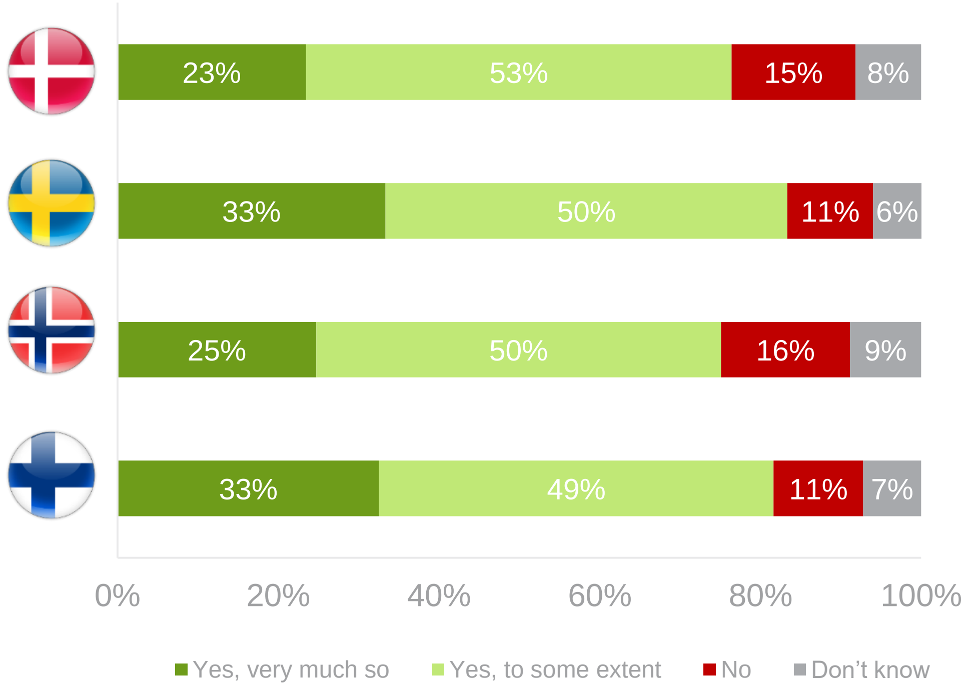
Subscribers/bundlers: 46%
Free users/trialists: 39

Agree/Strongly agree
2017: 55%
2015: 56%

Subscribers/bundlers: 61%
Free users/trialists: 51%

Q16 Do you agree or disagree with this statement?
It would be fair if Facebook paid some of their revenue to the songwriters and performers of the music you can find on Facebook
Base: All

Background music is by large perceived to contribute to the overall atmosphere in a positive way. Swedes and Finns have a higher preference of hearing background hear music that they are already familiar with



Q25 Do you think background music in restaurants, cafes, pubs, night clubs etc. contribute in a positive way to the overall atmosphere of "a night out"?
Base: All

When background music is playing in restaurants, cafes, pubs, shopping malls, night clubs etc. that you go to, do you then prefer to hear music you are familiar with?

Yes, very much so	Yes, to some extent	No
15%	51%	20%
21%	53%	13%
17%	53%	17%
21%	55%	15%

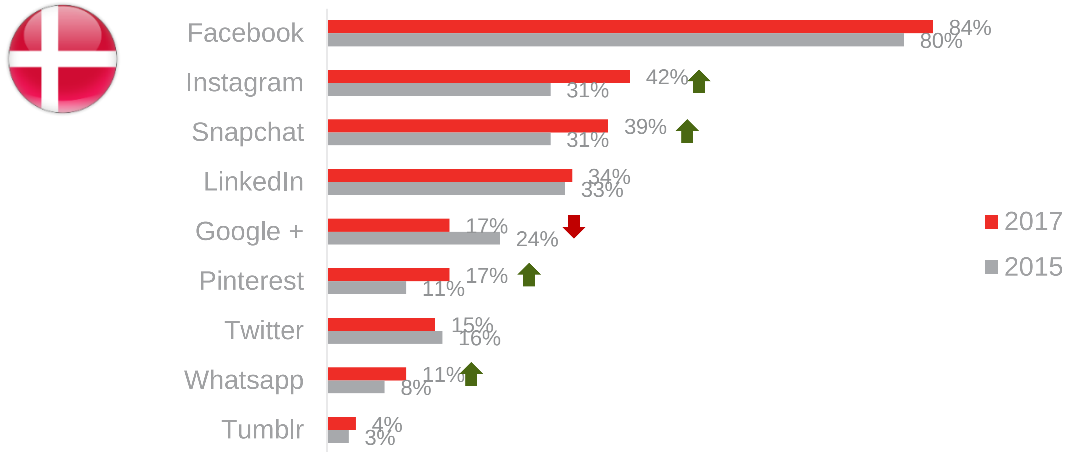
Q26 When background music is playing in restaurants, cafes, pubs, shopping malls, night clubs etc. that you go to, do you then prefer to hear music you are familiar with?
Base: All

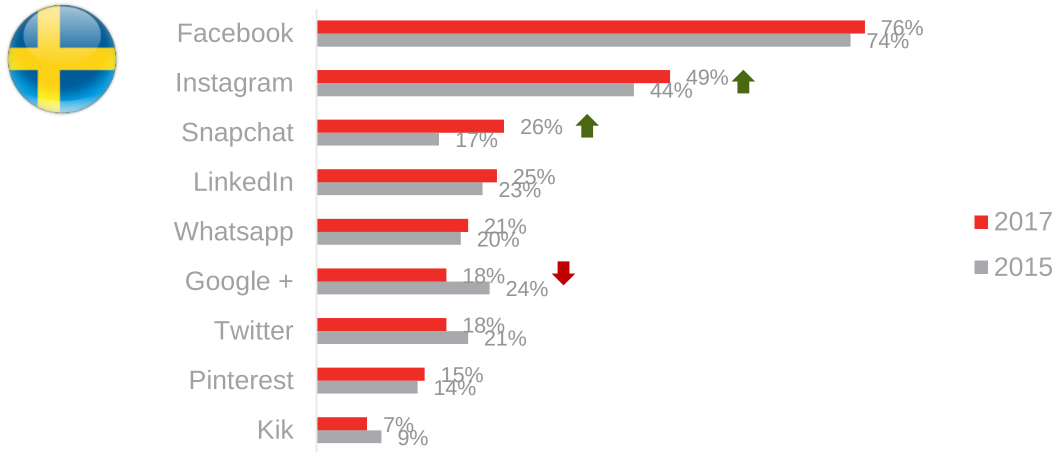
Social Media

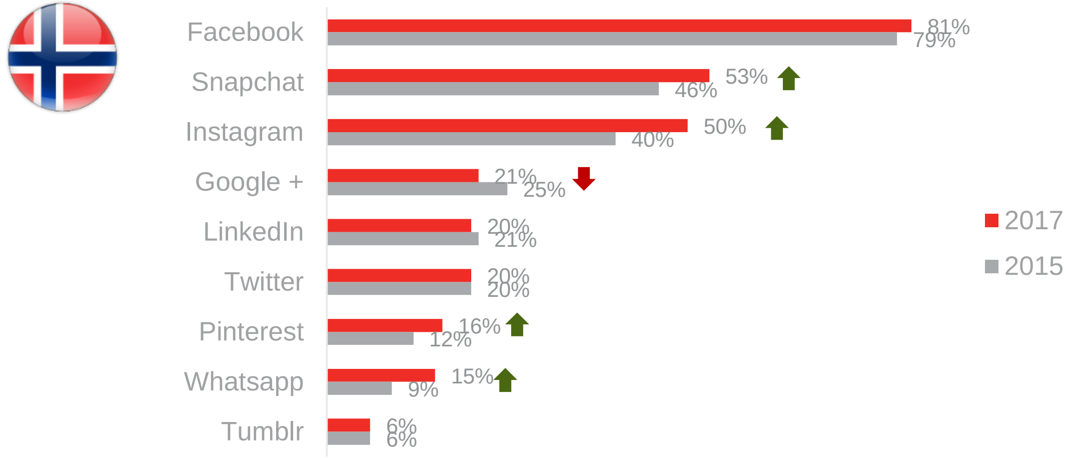
Top 8 social media usage

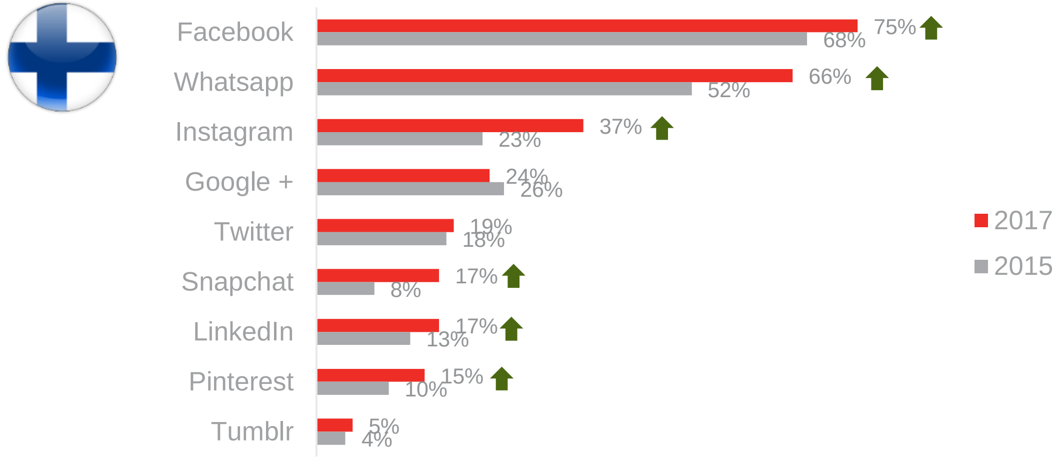
Facebook is by far the largest social media in the Nordics. Since 2015 Instagram and Snapchat have grown significantly in all four countries

Significant changes from 2015 to 2017









Q16a Do you currently use one or several of the following services?
Base: All

YouGov

Across the Nordics, 1 in 5 people have watched or shared a concert on social media. Facebook is, beyond comparison, the preferred media to use watch or share a gig/concert

Ever watched or shared a live streamed gig or concert on social media	18%	19%	17%	22%

Q17 Have you ever shared video files or streams of live music performances on social networking services?
Base: All

Top 3 media to watch or share a gig/concert

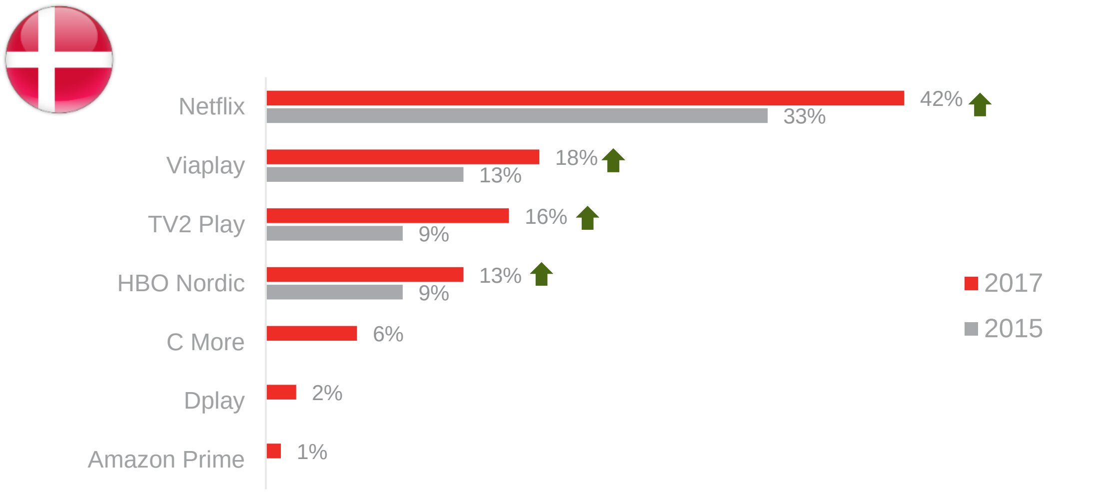
facebook	78%	72%	63%	71%
Instagram	17%	26%	35%	20%
snapchat	17%	12%	33%	10%

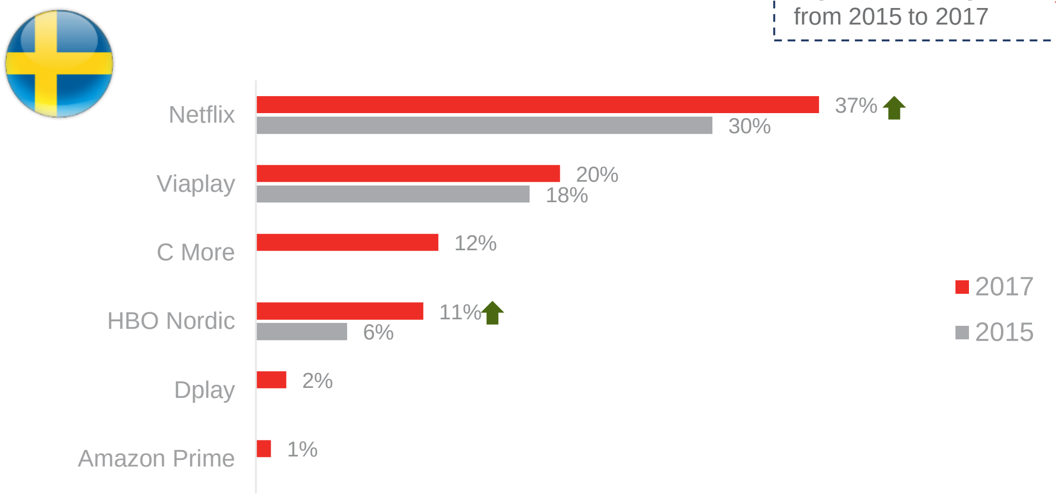
Q18 On what services have you watched or shared a live streamed gig or concert?
Base: Have watched or shared live streamed gig or concert on social media

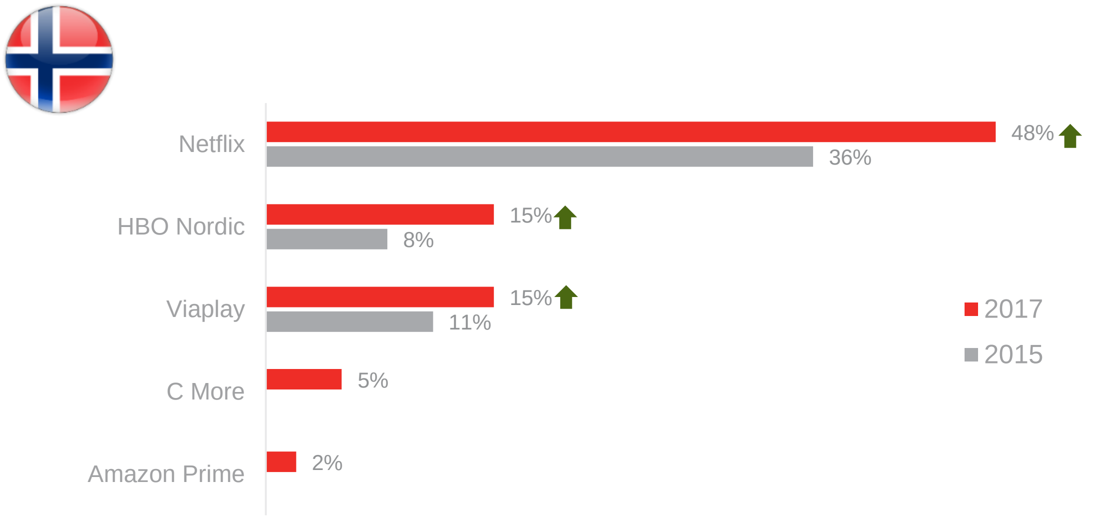
TV streaming

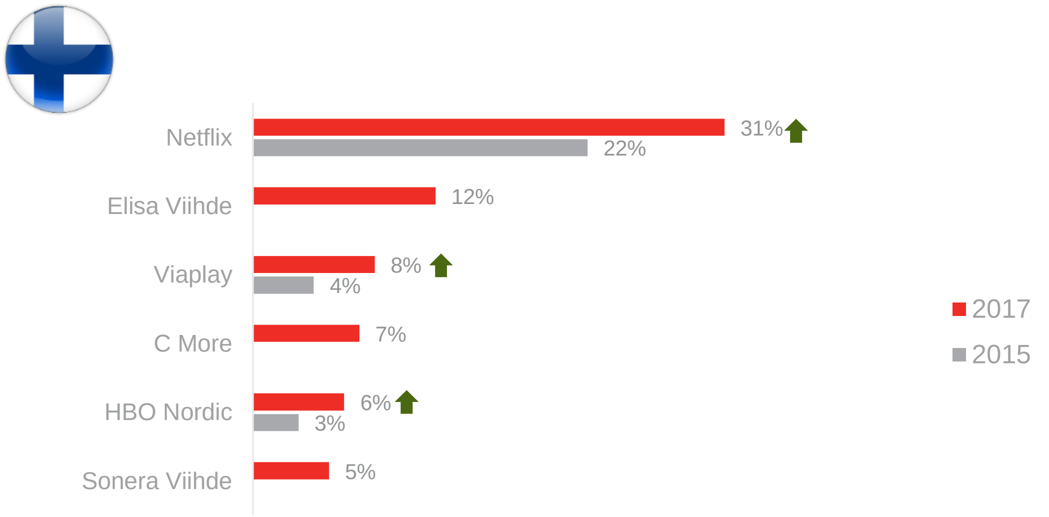
Since 2015, digital services providing streaming of TV/ movies/series have increased significantly across all Nordic countries

Significant chnages from 2015 to 2017





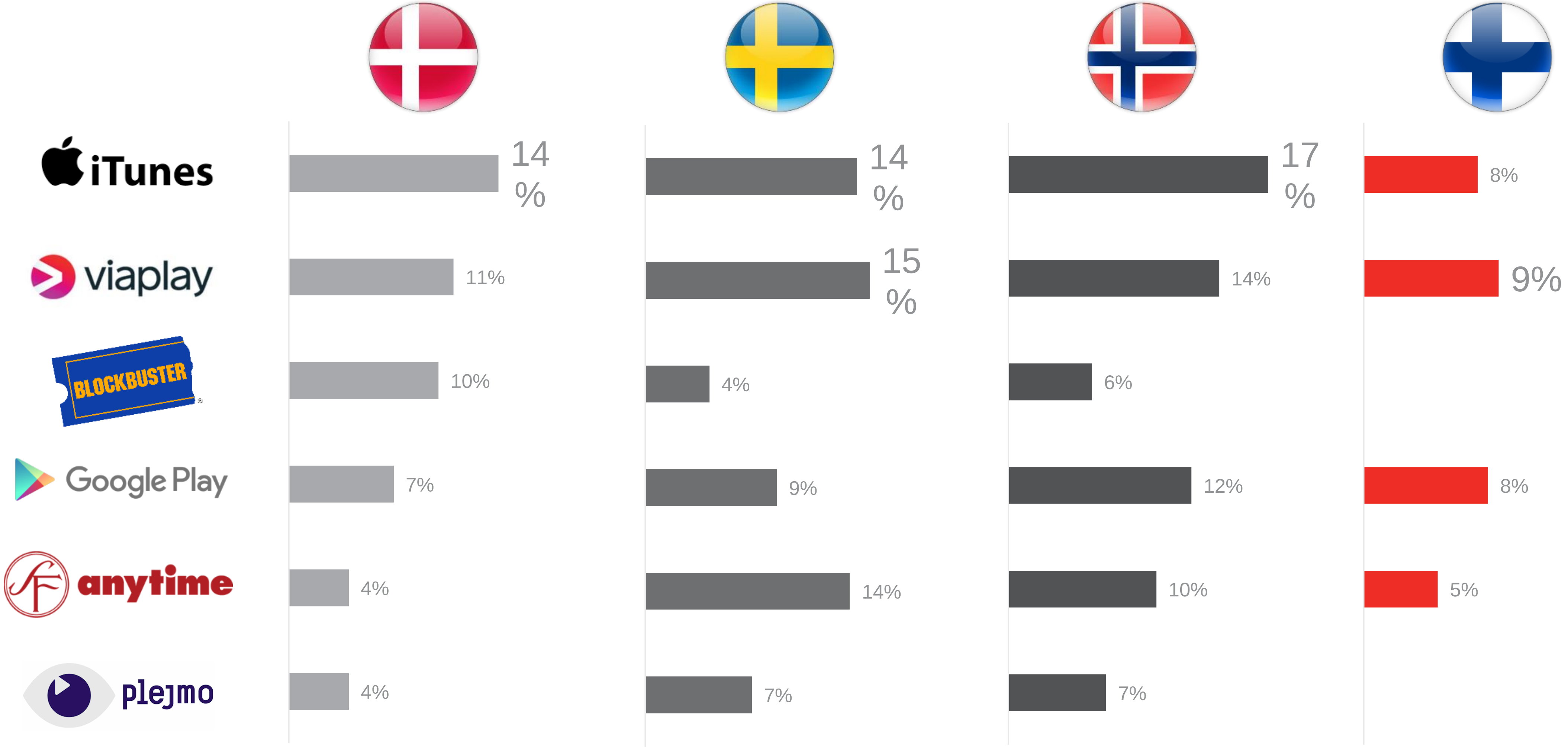




Q11 Do you currently subscribe to one or several of the following digital services providing TV and/or movie content?
Base: All

YouGov

Finns purchase less music and TV/video content than the other Nordic populations

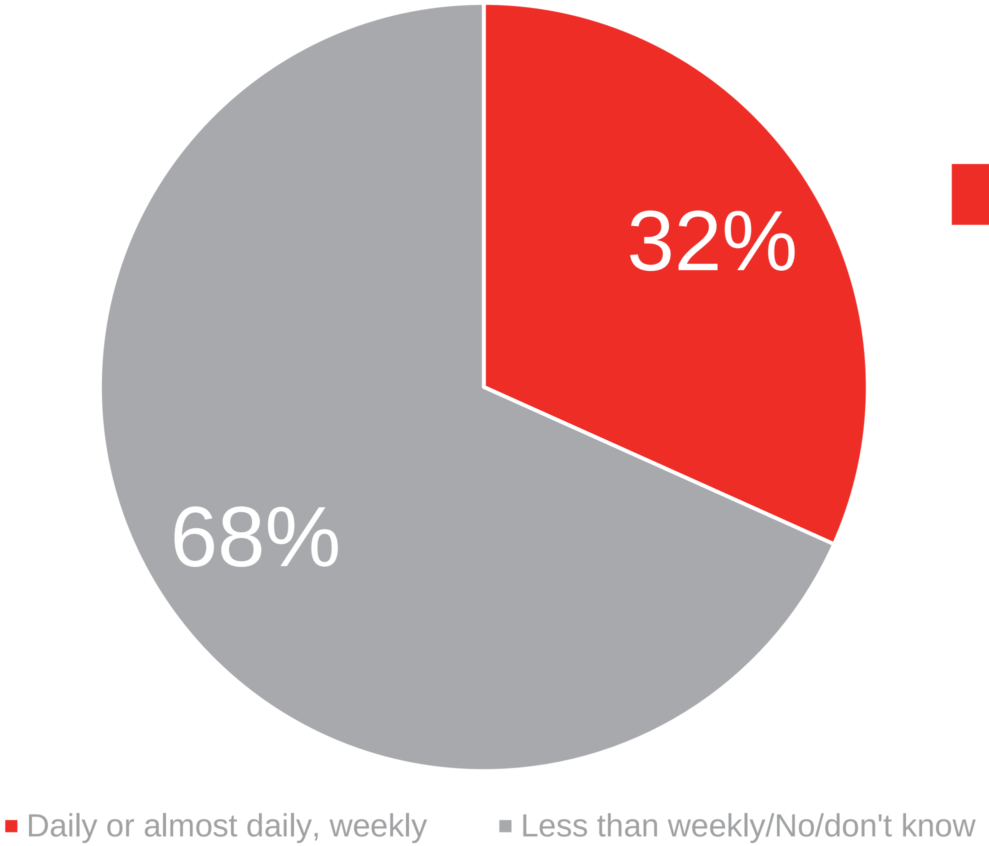


Q13a Have you, within the last 12 months purchased music or TV/video content from the following services?
Base: All

Profiling streamers on YouTube

Streamers on YouTube - Denmark

1/3 of Danes use YouTube at least weekly for streaming music



We'll profile Danes who stream music on YouTube at least weekly

45% pay for at least one music service subscription

Q7 In the past 12 months, have you personally used, or do you currently use any of the following digital music services (for music or music videos)?
Base: All

Q8 How often do you use the following services (for music or music videos)?
Base: Have used the service within last 12 months

Profiles on YouTube music streamers - Denmark

Significant demographic variations on weekly+ YouTube music streamers

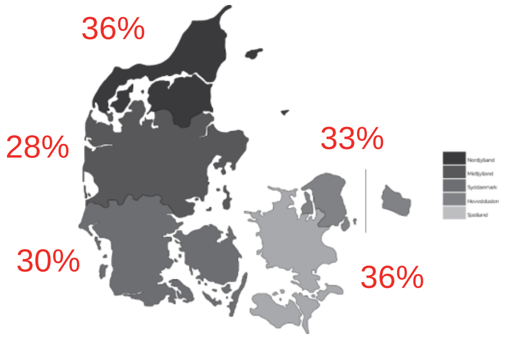
Stream music on YouTube at least weekly – 32%

Gender

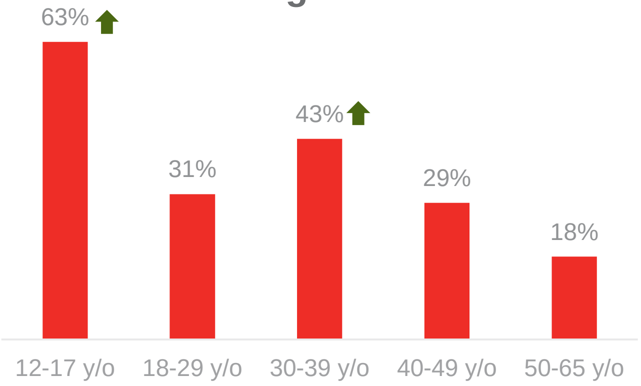
31%

32%

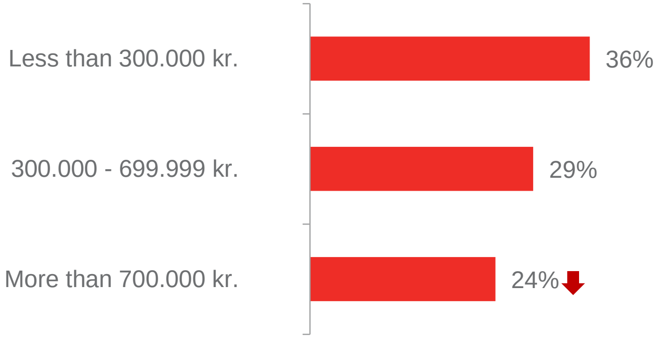
Region



Age



Household income



Occupation

Profile

Demographics:

Almost 2/3 of Danes aged 12-17 stream music on YouTube at least weekly – which are twice as many among all Danes. There are fewer weekly YouTube streamers among those with high household.

Behavior/attitudes:

Danes who stream music on YouTube at least weekly differ from the rest of the population on behavior and attitude on the following:

- use more digital music services
- more people who agree that having access to all the music they like and that it's free when choosing a music service
- generally more people who agree on statements related to music streaming – but *not* on the statement about the importance that artists should be compensated when their music are used in online services

Profiles on YouTube music streamers - Denmark

Significant variations – YouTube music streamers weekly+ ↑ vs. Non YouTube music streamers weekly+

Stream music on YouTube at least weekly

Don't stream music on YouTube at least weekly

	Gone to a concert past 12 months	Average number of concerts past 12 months
Stream music on YouTube at least weekly	63%	2,95
Don't stream music on YouTube at least weekly	61%	3,04

Buy music

	YouTube Weekly+	Non YouTube Weekly+
Music downloads	14%	15%
CDs	13%	16%
Vinyl	9%	6%
Other formats	4%	2%
Haven't bought music	**68%**	**64%**

Top 3 music services

	YouTube weekly+	Non YouTube Weekly+
YouTube	100% ↑	24%
Spotify	47% ↑	34%
iTunes	22% ↑	12%

Top 5 drivers when choosing music service

YouTube weekly+		Non YouTube weekly+	
That I have access to all the music I like	57% ↑	That I have access to all the music I like	39%
That it's free	42% ↑	That the service is legal	37%
That the sound is of high quality	41% ↑	That the sound is of high quality	34%
That the service is legal	39%	Ease of use	30%
Ease of use	37% ↑	That it's free	30%

Top 5 Statements

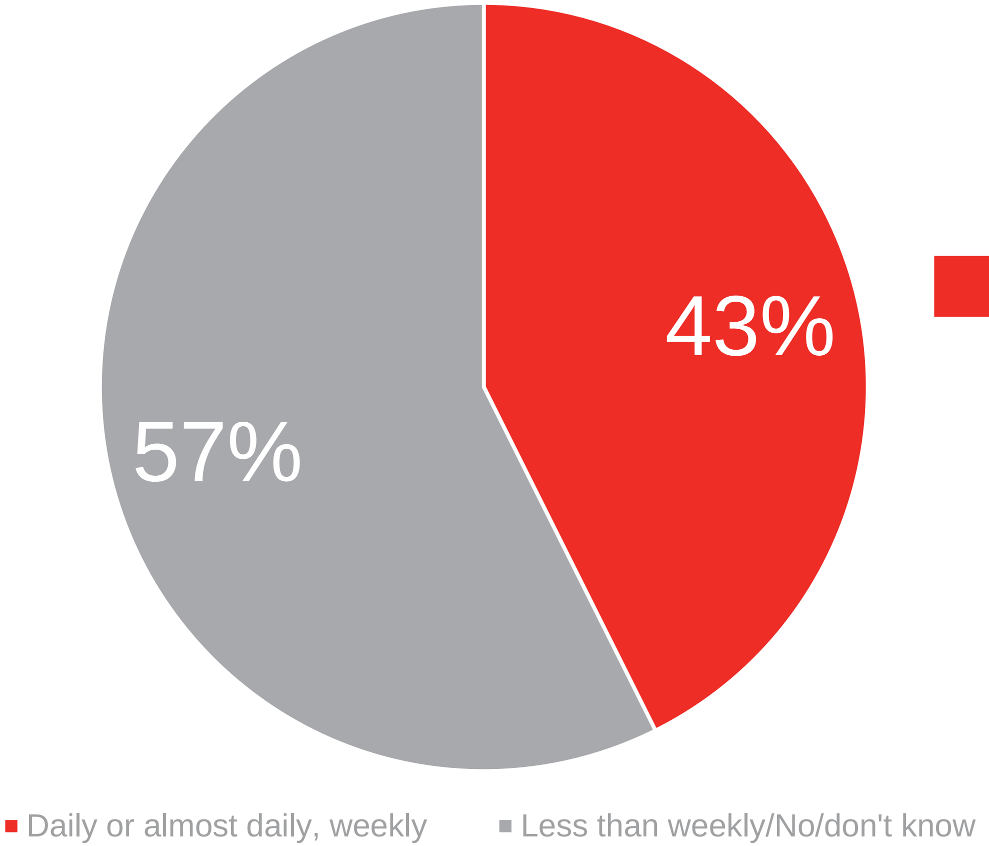
(agree/strongly agree)

	YouTube weekly+	Non YouTube weekly+
I find it important that creators of music get a compensation when their works are used in online…	67%	69%
There is adequate information on songwriters, musicians, producers etc. on tracks and albums on…	31% ↑	20%
I often find interesting music via social media	30% ↑	13%
It should be easier to find domestic music on digital music services	28% ↑	18%
It is usually easy to know what kind of content I am allowed to share online	28% ↑	16%

YouGov

Streamers on YouTube - Sweden

4 out of 10 Swedes use YouTube at least weekly for streaming music



We’ll profile Swedes who stream music on YouTube at least weekly

53% pay for at least one music service subscription

Q7 In the past 12 months, have you personally used, or do you currently use any of the following digital music services (for music or music videos)?
Base: All

Q8 How often do you use the following services (for music or music videos)?
Base: Have used the service within last 12 months

Profiles on YouTube music streamers - Sweden

Significant demographic variations on weekly+ YouTube music streamers

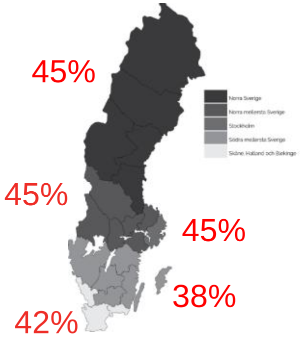
Stream music on YouTube at least weekly – 43%

Gender

37%

48%

Region



Profile

Demographics:

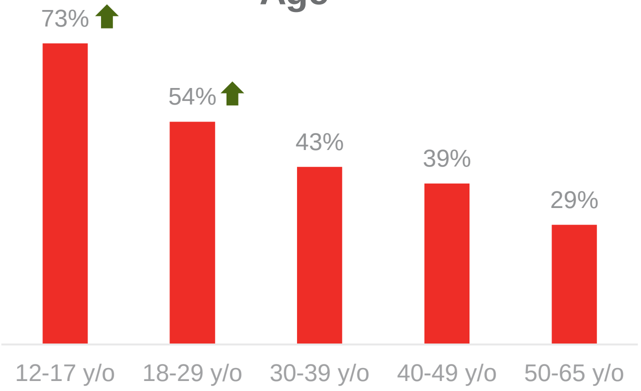
There are more weekly YouTube streamers among men than women in Sweden. Almost 3/4 of the Swedes aged 12-17 stream music on YouTube at least weekly. There are therefore also significantly more students who stream music on YouTube at least weekly. Furthermore, significantly more Swedes with a household income less than 300.000 kr. stream music on YouTube at least weekly.

Behavior/attitudes:

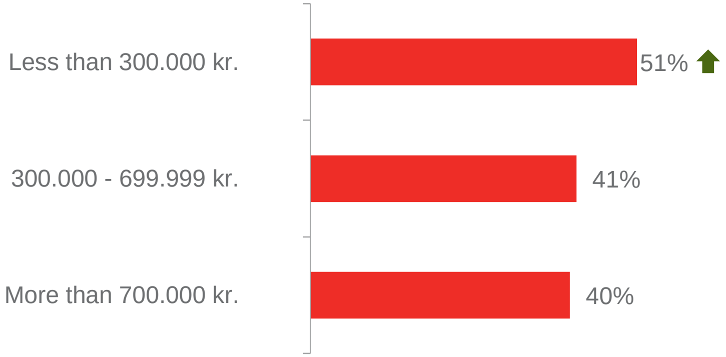
Swedes who stream music on YouTube at least weekly differ from the rest of the population on behavior and attitude on the following:

- higher share of annual concert goers and the concert goers on average attend more concerts
- use more digital music service
- buy more music downloads
- when choosing a music service they put more emphasis on that the sound is of high quality, that is free and that they have access to all the music they like
- generally more people who agree on statements related to music streaming

Age



Household income



Occupation

YouGov

Profiles on YouTube music streamers - Sweden

Significant variations – YouTube music streamers weekly+ vs. Non YouTube music streamers weekly+

Stream music on YouTube at least weekly

Don't stream music on YouTube at least weekly

	Gone to a concert past 12 months	Average number of concerts past 12 months
Stream music on YouTube at least weekly	59% ⬆	3,26 ⬆
Don't stream music on YouTube at least weekly	52%	2,75

Buy music

	YouTube Weekly+	Non YouTube Weekly+
Music downloads	17% ⬆	13%
CDs	17%	15%
Vinyl	9% ⬆	5%
Other formats	2%	3%
Haven't bought music	63%	66%

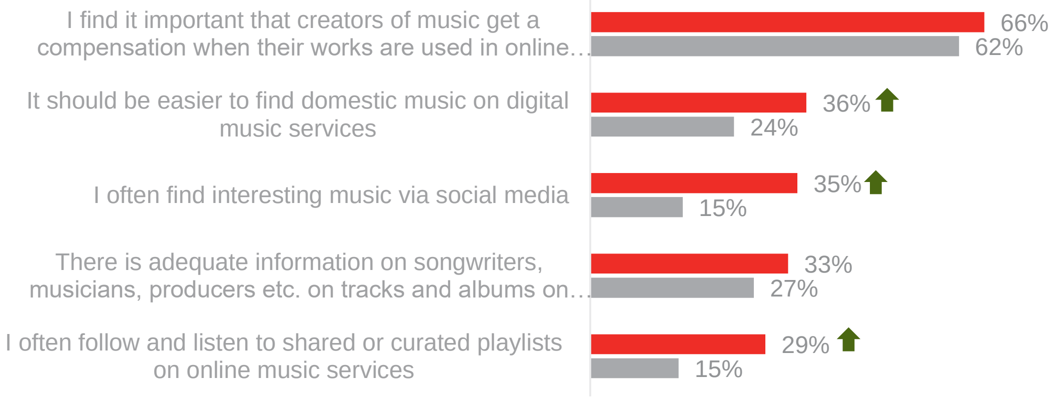
Top 3 music services

	YouTube weekly+	Non YouTube Weekly+
YouTube	100% ⬆	31%
Spotify	19% ⬆	9%
SoundCloud	16% ⬆	5%

Top 5 drivers when choosing music service

Stream music on YouTube at least weekly		Don't stream music on YouTube at least weekly	
That I have access to all the music I like	53% ⬆	Ease of use	42%
Ease of use	46%	That I have access to all the music I like	39%
That the sound is of high quality	39% ⬆	That the sound is of high quality	29%
That is if free	33% ⬆	That the service is legal	26%
That the music can be easily used on multiple devices and platforms	30%	That the music can be easily used on multiple devices and platforms	25%

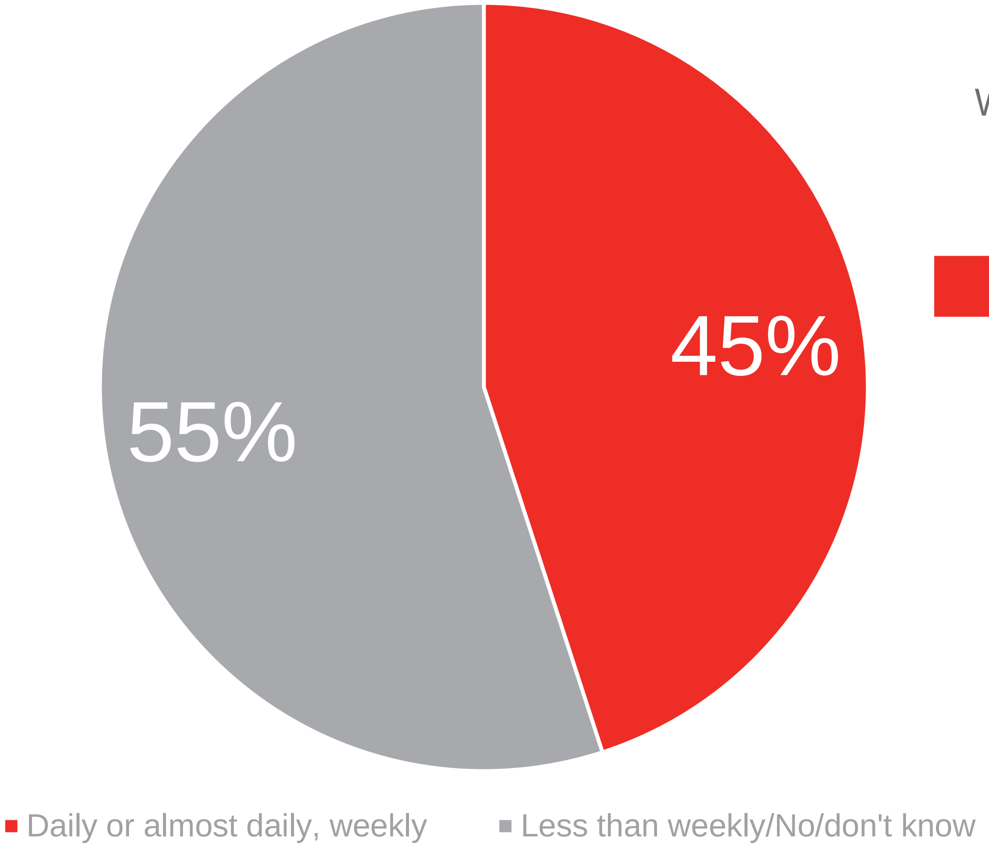
Top 5 Statements
(agree/strongly agree)



YouGov

Streamers on YouTube - Norway

Almost half of Norwegians use YouTube at least weekly for streaming music



We'll profile Norwegians who stream music on YouTube fat least weekly

56% pay for at least one music service subscription

Q7 In the past 12 months, have you personally used, or do you currently use any of the following digital music services (for music or music videos)?
Base: All

Q8 How often do you use the following services (for music or music videos)?
Base: Have used the service within last 12 months

Profiles on YouTube music streamers - Norway

Significant demographic variations on weekly+ YouTube music streamers

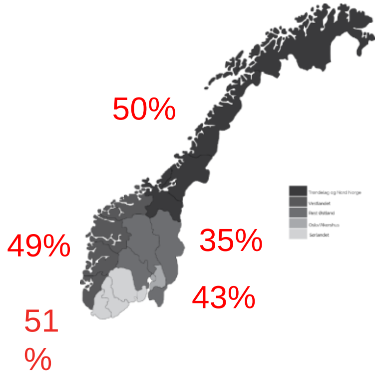
Stream music on YouTube at least weekly – 45%

Gender

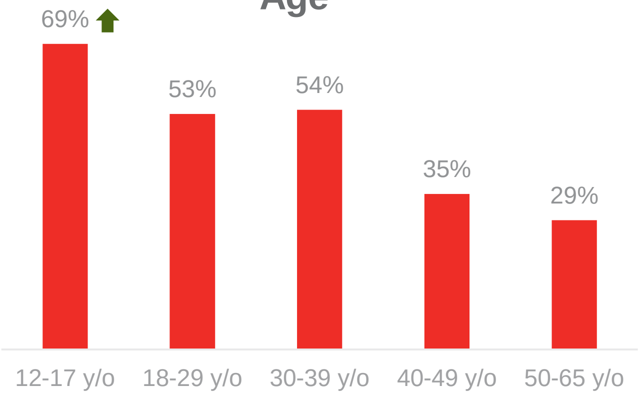
43%

48%

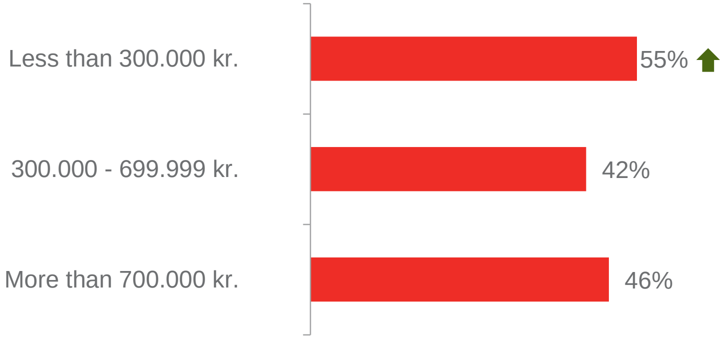
Region



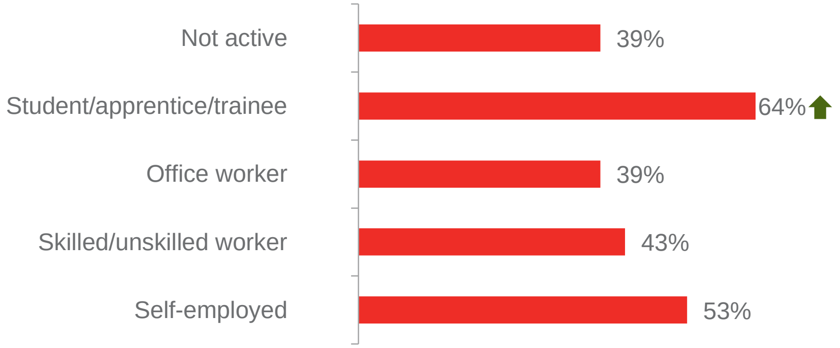
Age



Household income



Occupation



Profile

Demographics:

69% of Norwegians aged 12-17 stream music on YouTube at least weekly. There are therefore also significantly more students who stream music on YouTube at least weekly.

Behavior/attitudes:

Norwegians who stream music on YouTube at least weekly differ from the rest of the population on behavior and attitude on the following:

- higher share of annual concert goers
- use more digital music service
- It is more important to them that they have access to all music they like, it's ease of use, that the sound is of high quality and that the music can be used on multiple devices and platforms
- generally more people who agree on statements related to music streaming and on the statement about the importance that artists should be compensated when their music are used in online services

Profiles on YouTube music streamers - Norway

Significant variations – YouTube music streamers weekly+ vs. Non YouTube music streamers weekly+

Stream music on YouTube at least weekly

Don't stream music on YouTube at least weekly

	Gone to a concert past 12 months	Average number of concerts past 12 months
Stream music on YouTube at least weekly	64% ↑	3,19
Don't stream music on YouTube at least weekly	57%	3,43

Buy music

	YouTube Weekly+	Non YouTube Weekly+
Music downloads	23%	18%
CDs	23% ↑	17%
Vinyl	9%	8%
Other formats	3%	4%
Haven't bought music	**53%**	**56%**

Top 3 music services

	YouTube weekly+	Non YouTube Weekly+
YouTube	100% ↑	30%
Spotify	70% ↑	43%
iTunes	22% ↑	12%

Top 5 drivers when choosing music service

Stream music on YouTube at least weekly		Don't stream music on YouTube at least weekly	
That I have access to all the music I like	59% ↑	That I have access to all the music I like	41%
Ease of use	46% ↑	Ease of use	37%
That the sound is of high quality	46% ↑	That the service is legal	32%
That the music can be easily used on multiple devices and platforms	37% ↑	That the sound is high quality	30%
That the service is legal	36%	That the music can be easily used on multiple devices and platforms	25%

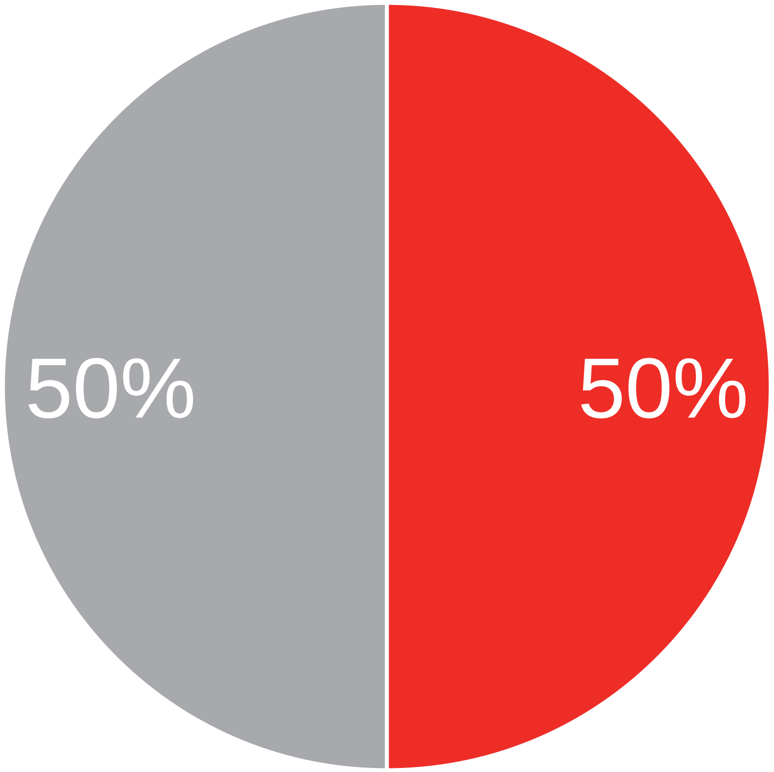
Top 5 Statements
(agree/strongly agree)

	YouTube weekly+	Non YouTube weekly+
I find it important that creators of music get a compensation when their works are used in online…	67% ↑	55%
I often find interesting music via social media	41% ↑	21%
It should be easier to find domestic music on digital music services	38% ↑	28%
It is usually easy to know what kind of content I am allowed to share online	36%	31%
There is adequate information on songwriters, musicians, producers etc. on tracks and albums on…	35% ↑	24%

YouGov

Streamers on YouTube - Finland

Half of Finns use YouTube at least weekly for streaming music



We'll profile Finns who stream music on YouTube at least weekly

26% pay for at least one music service subscription

Q7 In the past 12 months, have you personally used, or do you currently use any of the following digital music services (for music or music videos)?
Base: All

Q8 How often do you use the following services (for music or music videos)?
Base: Have used the service within last 12 months

Profiles on YouTube music streamers - Finland

Significant demographic variations on weekly+ YouTube music streamers

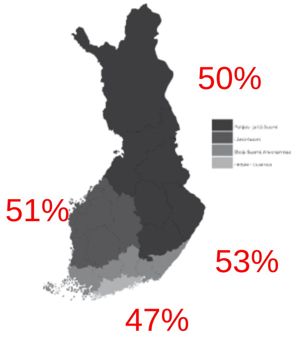
Stream music on YouTube at least weekly – 50%

Gender

49%

50%

Region



Profile

Demographics:

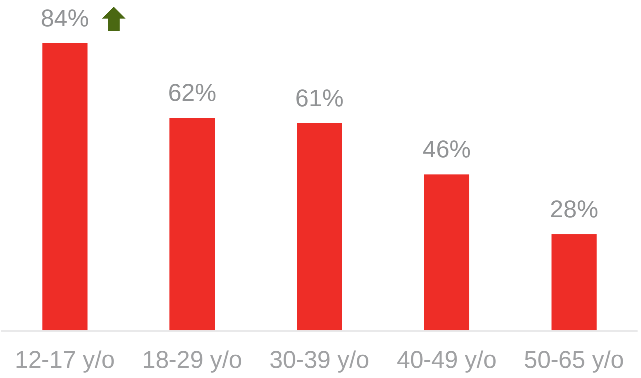
More than 8 out of 10 aged 12-17 years old stream music on YouTube at least weekly.

Behavior/attitudes:

Finns who stream music on YouTube at least weekly differ from the rest of the population on behavior and attitude on the following:

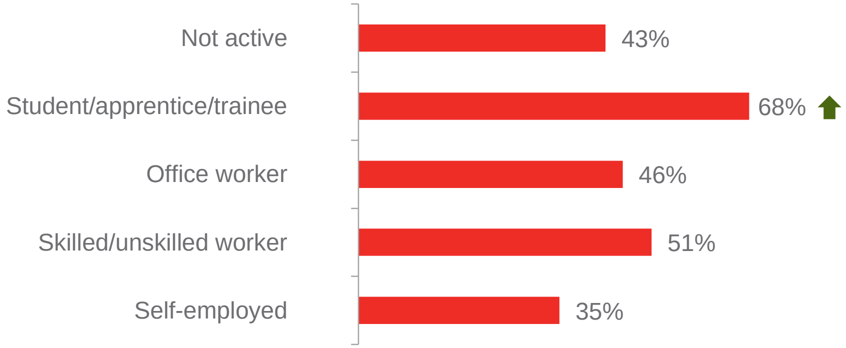
- higher share of annual concert goers
- use more digital music service
- buy more music downloads
- It is more important to them that it's free, ease of use and that they have access to all the music they like
- generally more people who agree on statements related to music streaming

Age



Household income

Occupation



YouGov

Profiles on YouTube music streamers - Finland

Significant variations – YouTube music streamers weekly+ ↑ vs. Non YouTube music streamers weekly+

Stream music on YouTube at least weekly

Don't stream music on YouTube at least weekly

	Gone to a concert past 12 months	Average number of concerts past 12 months
Stream music on YouTube at least weekly	62% ↑	3,12
Don't stream music on YouTube at least weekly	52%	3,00

Buy music

	YouTube Weekly+	Non YouTube Weekly+
Music downloads	17% ↑	10%
CDs	26% ↑	19%
Vinyl	8% ↑	4%
Other formats	5%	4%
Haven't bought music	**58%**	**67%**

Top 3 music services

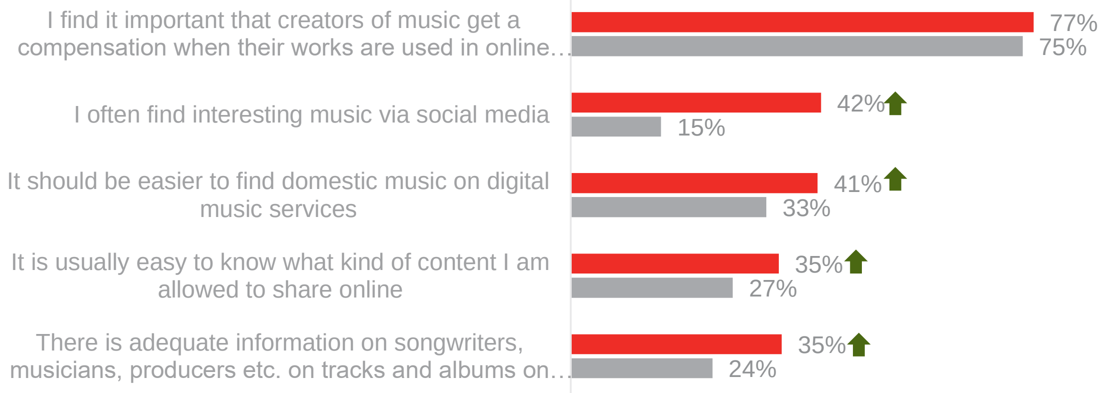
	YouTube weekly+	Non YouTube Weekly+
YouTube	100% ↑	38%
Spotify	58% ↑	34%
SoundCloud	12% ↑	2%

Top 5 drivers when choosing music service

YouTube weekly+		Non YouTube weekly+	
That it is free	51% ↑	That the service is legal	39%
Ease of use	50% ↑	Ease of use	38%
That I have access to all the music I like	43% ↑	That it's free	38%
That the service is legal	40%	That I have access to all the music I like	28%
That the service is of high quality	39% ↑	That the sound is of high quality	28%

Top 5 Statements

(agree/strongly agree)



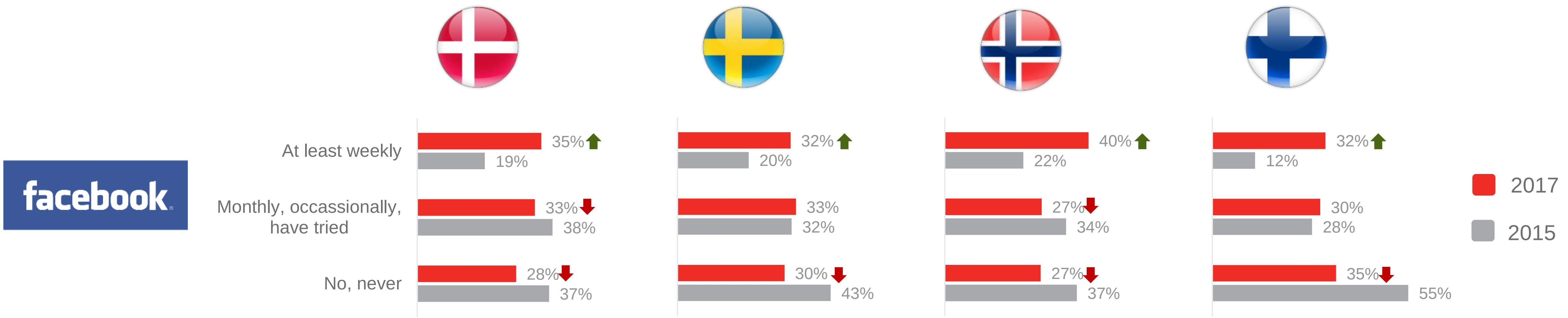
YouGov

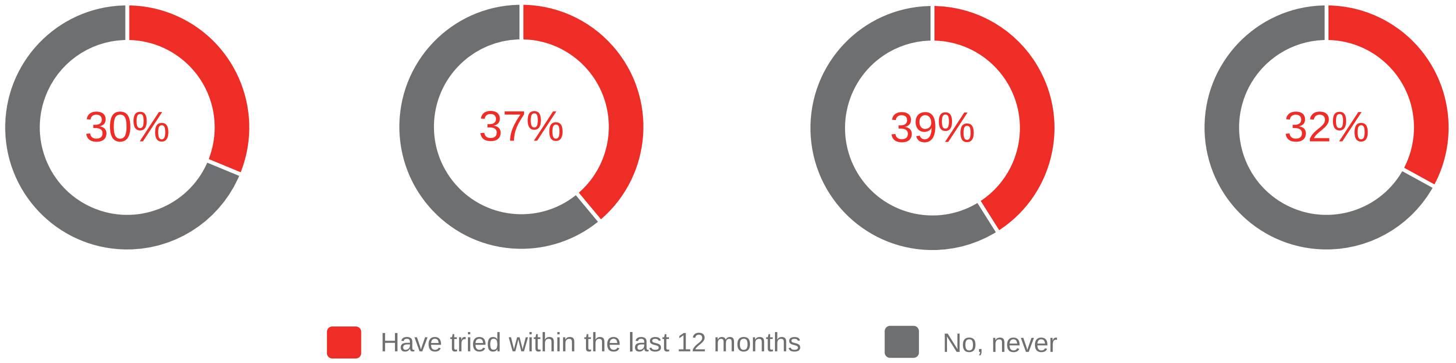
Profiling streamers on Facebook

Have watched a music video or a video that contained music on Facebook or Instagram

Since 2015, the share of people who at least weekly use Facebook to watch videos with music content has increased significantly in all Nordic countries. 1 in 3 have watched music content on Instagram within the last 12 months (more Swedes and Norwegians)

Significant changes from 2015 to 2017



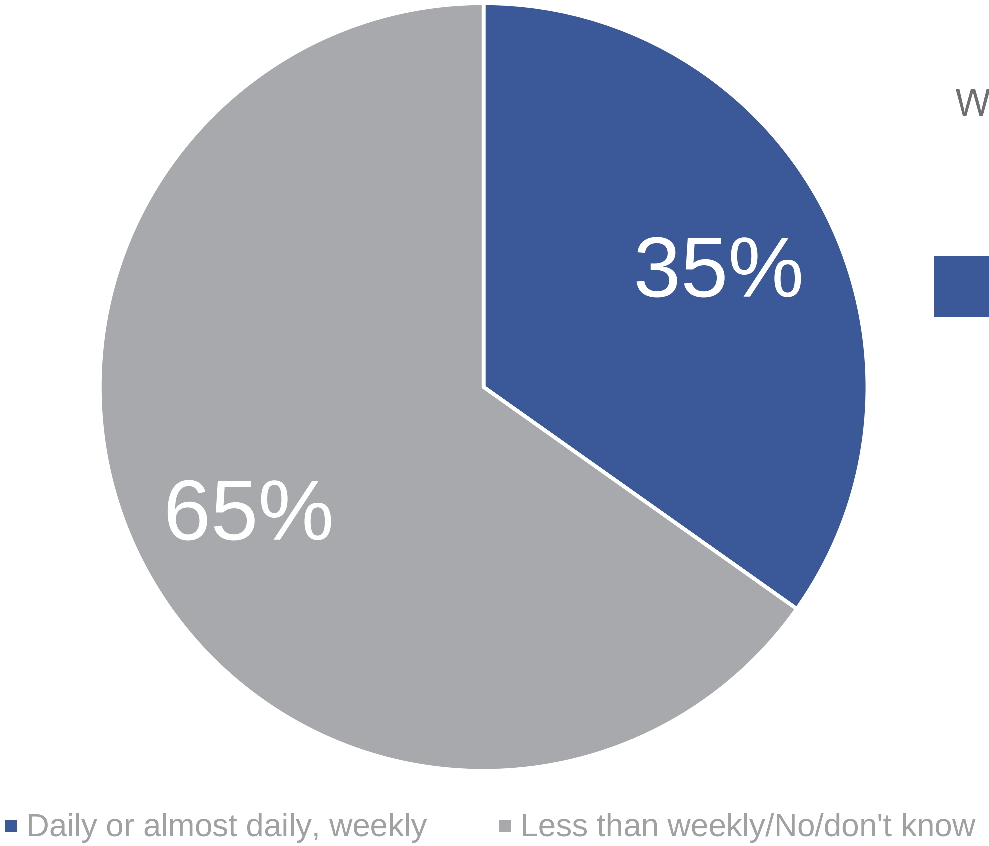


Q15a In the past 12 months, have you watched a music video or a video that contained music via these?
Base: All

YouGov

Streamers on Facebook - Denmark

1/3 of Danes watch music videos or video containing music on Facebook at least weekly



We'll profile Danes who watch videos with music content on Facebook at least weekly

Q15a In the past 12 months, have you watched a music video or a video that contained music via these?
Base: All

Profiles on Facebook music streamers - Denmark

Significant demographic variations on Facebook weekly+ streamers

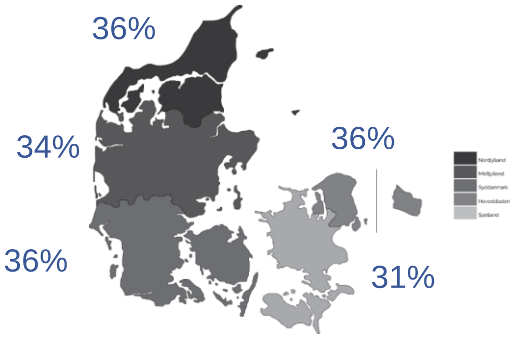
Watch videos containing music on Facebook at least weekly – 35%

Gender

35%

34%

Region



Profile

Demographics:

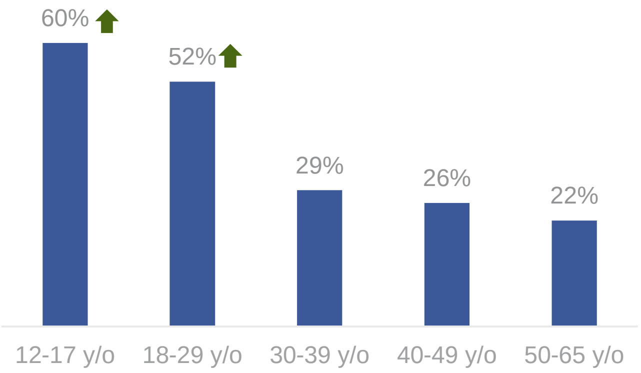
More than half of the young Danes aged 12-29 watch videos containing music on Facebook at least weekly. There are therefore also significantly more students who watch videos containing music at least weakly. But there are no significant regional or gender difference.

Behavior/attitudes:

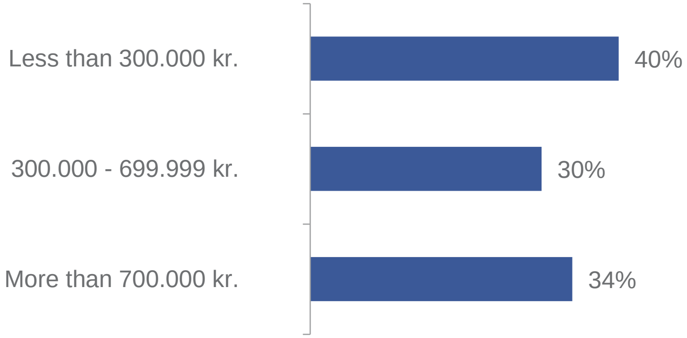
Danes who watch videos containing music on Facebook at least weekly stand out from the rest on behavior and attitude on the following:

- are more frequent concert goers
- buy more music downloads
- stream more music on streaming services
- prefer to a higher degree to have access to the music they like and that the service is free
- generally agree more on statements related to music streaming – but *not* on the statement about the importance that artists should be compensated when their music are used in online services

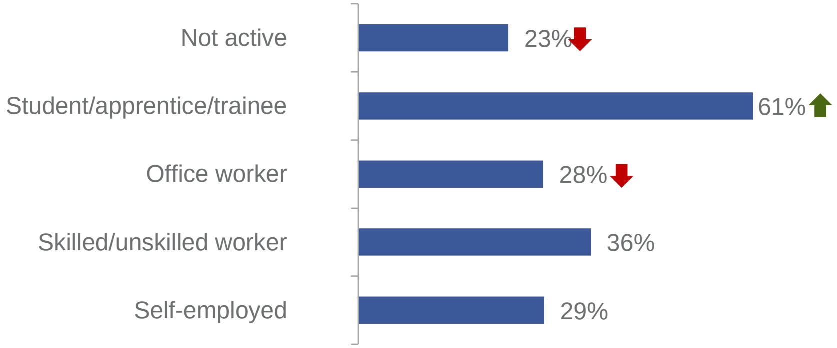
Age



Household income



Occupation



YouGov

Profiles on Facebook music streamers - Denmark

Significant variations – Facebook music streamers weekly+ vs. Non Facebook music streamers weekly+ ⬆

Watch videos containing music on Facebook weekly+
Don't watch videos containing music on Facebook weekly+

	Gone to a concert past 12 months	Average number of concerts past 12 months
Facebook weekly+	65%	3,46 ⬆
Non Facebook weekly+	60%	2,76

Buy music

	Facebook Weekly+	Non Facebook Weekly+
Music downloads	18% ⬆	13%
CDs	12%	16%
Vinyl	7%	6%
Other formats	3%	3%
Haven't bought music	**63%**	**66%**

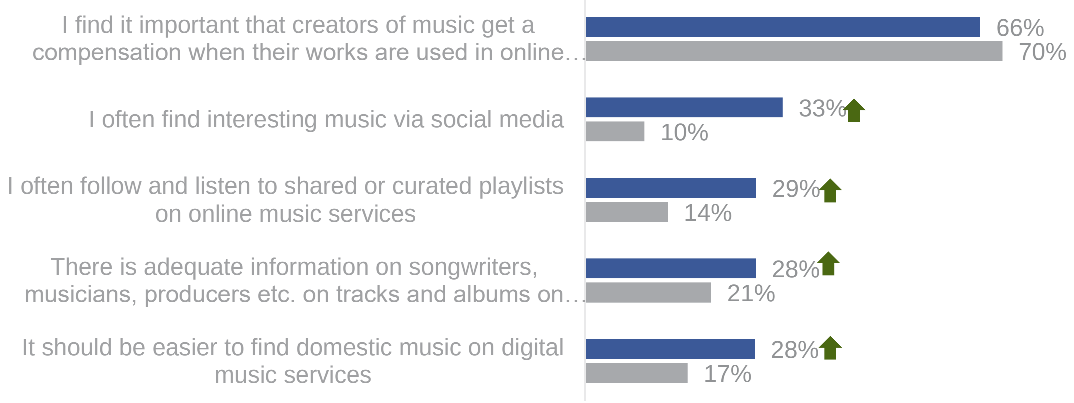
Top 3 music services

	Facebook Weekly+	Non Facebook Weekly+
YouTube	55% ⬆	44%
Spotify	52% ⬆	30%
iTunes	21% ⬆	12%

Top 5 drivers when choosing music service

Facebook weekly+		Non Facebook weekly+	
That I have access to all the music I like	50% ⬆	That I have access to all the music I like	42%
That it's free	42% ⬆	That the service is legal	37%
That the service is legal	39%	That the sound is of high quality	36%
That the sound is of high quality	38%	Ease of use	31%
Ease of use	34%	That it's free	29%

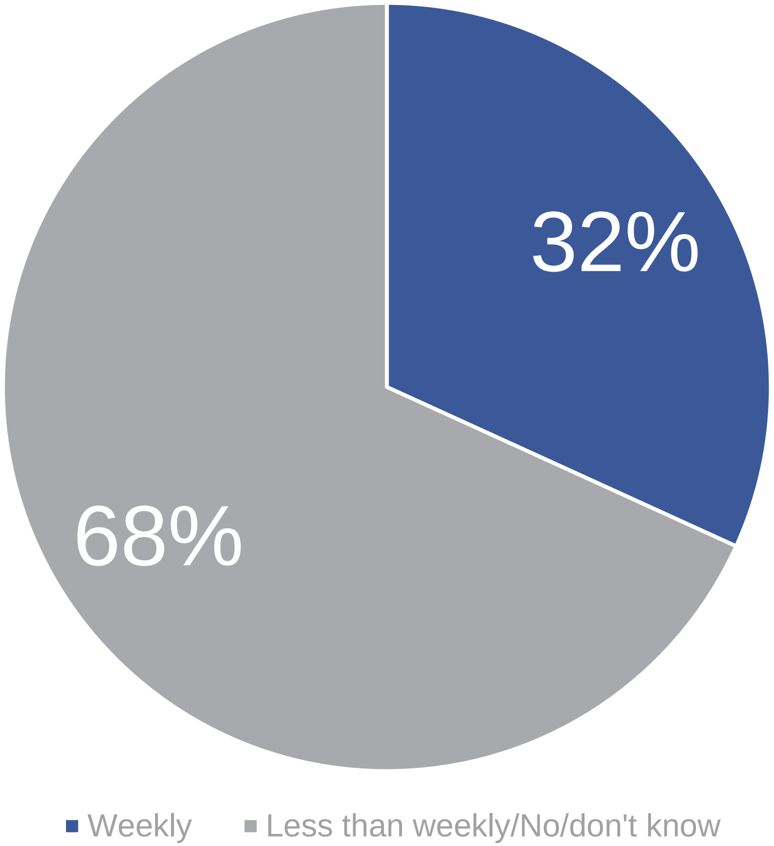
Top 5 Statements
(agree/strongly agree)



YouGov

Streamers on Facebook - Sweden

Also 1/3 of the Swedes watch music videos or video containing music on Facebook at least weekly



We’ll profile Swedes who watch videos with music content on Facebook at least weekly

Q15a In the past 12 months, have you watched a music video or a video that contained music via these?
Base: All

Profile on Facebook music streamers - Sweden

Significant demographic variations on Facebook weekly+ streamers

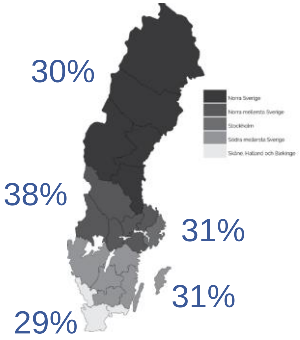
Watch videos containing music on Facebook at least weekly – 32%

Gender

33%

31%

Region



Profile

Demographics:

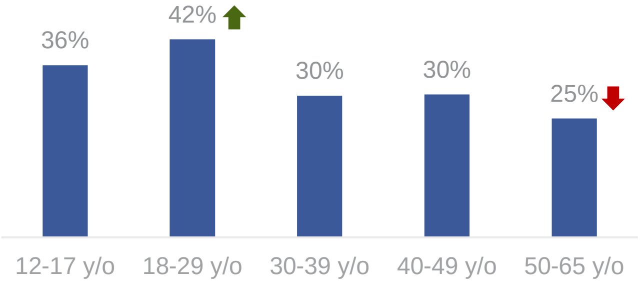
Swedes aged 18-29 years old and students watch more videos containing music on Facebook at least weekly

Behavior/attitudes:

There are generally not that much difference on Swedes who watch videos that contain music on Facebook at least weekly and those who don’t in terms of their behavior and attitudes.
The Swedes who watch videos that contain music on Facebook at least weekly are however:

- higher share of annual concert goers and the concert goers on average attend more concerts
- stream more music on streaming services
- generally agree more on statements related to music streaming – but *not* on the statement about the importance that artists should be compensated when their music are used in online services

Age



Household income

Occupation

YouGov

Profile on Facebook music streamers - Sweden

Significant variations – Facebook music streamers veekly+ vs. Non Facebook music streamers weekly+ ⬆

Watch videos containing music on Facebook weekly+
Don't watch videos containing music on Facebook weekly+

	Gone to a concert past 12 months	Average number of concerts past 12 months
Facebook weekly+	60% ⬆	3,36 ⬆
Non Facebook weekly+	52%	2,78

Buy music

	Facebook Weekly+	Non Facebook Weekly+
Music downloads	18%	13%
CDs	18%	15%
Vinyl	7%	6%
Other formats	4%	2%
Haven't bought music	**62%**	66% ⬆

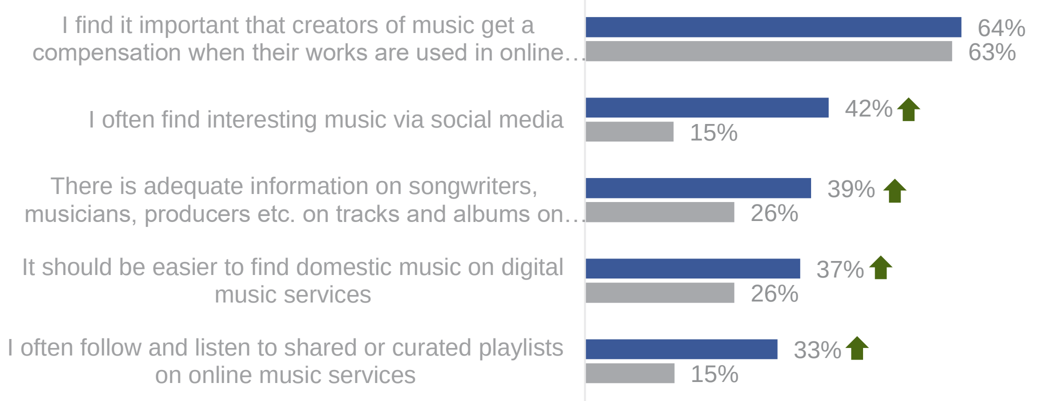
Top 3 music services

	Facebook Weekly+	Non Facebook Weekly+
YouTube	74% ⬆	59%
Spotify	71% ⬆	56%
iTunes	17% ⬆	11%

Top 5 drivers when choosing music service

Facebook Weekly+		Non Facebook Weekly+	
That I have access to all the music I like	48%	That I have access to all the music I like	43%
Ease of use	44%	Ease of use	43%
That the sound is of high quality	37%	That the sound is of high quality	31%
That the music can be easily used on multiple devices and platforms	31%	That the service is legal	28%
That it's free	27%	That it's free	26%

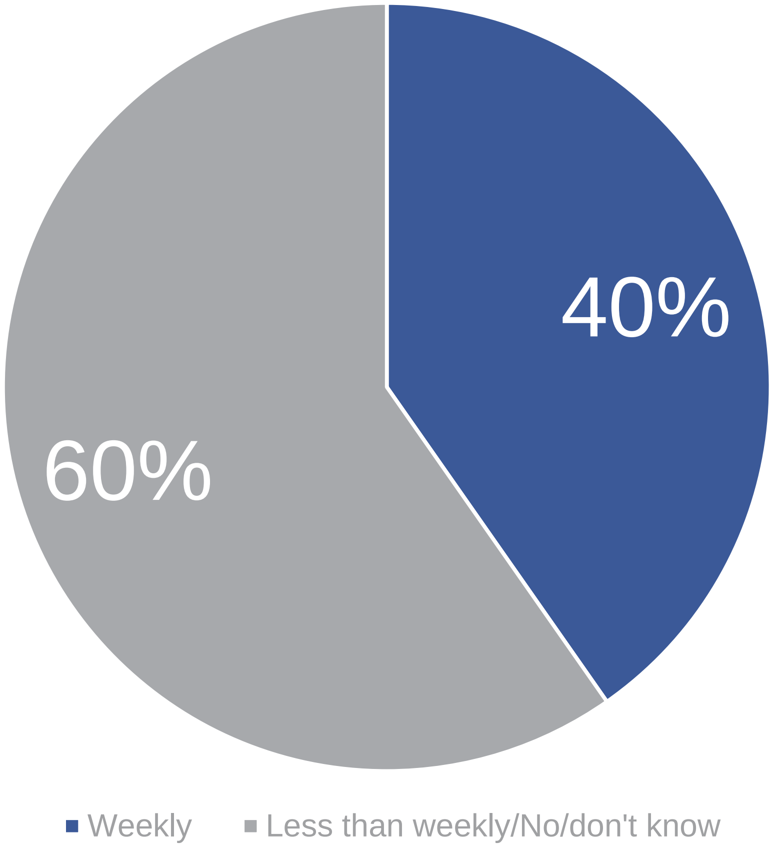
Top 5 Statements
(agree/strongly agree)



YouGov

Streamers on Facebook - Norway

4 out of 10 Norwegians watch music videos or video containing music on Facebook at least weekly



We'll profile Norwegians who watch videos with music content on Facebook at least weekly

Q15a In the past 12 months, have you watched a music video or a video that contained music via these?
Base: All

Profiles on Facebook music streamers - Norway

Significant demographic variations on Facebook weekly+ streamers

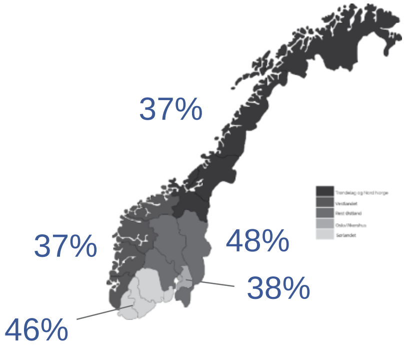
Watch videos containing music on Facebook at least weekly – 40%

Gender

39%

41%

Region



Profile

Demographics:

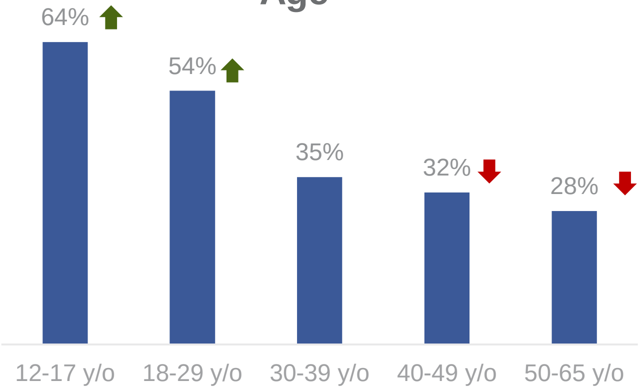
2/3 of young Norwegians aged 12-17 and more than half of Norwegians aged 18-29 watch videos that contain music on Facebook at least weekly. The only other significant variation is that many are students as occupation, which of course is also correlated with age.

Behavior/attitudes:

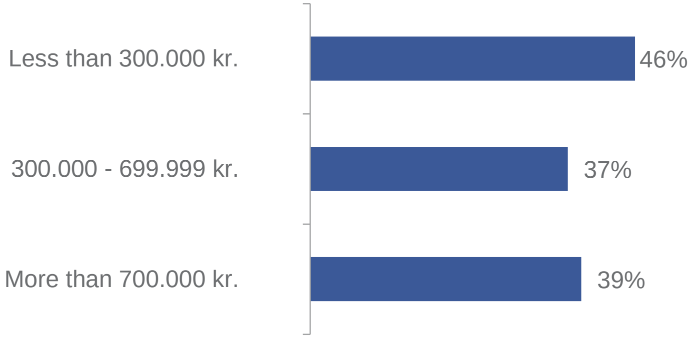
Norwegians who watch videos containing music on Facebook at least weekly separates them from the rest on the following:

- a higher share who goes to concerts at least once a year
- buy more music downloads, CD's and vinyls
- when choosing a music service they put more emphasis on that the sound is of high quality and that the music can be easily used on multiple devices and platforms
- generally agree more on statements related to music streaming – but *not* on the statement about the importance that artists should be compensated when their music are used in online services

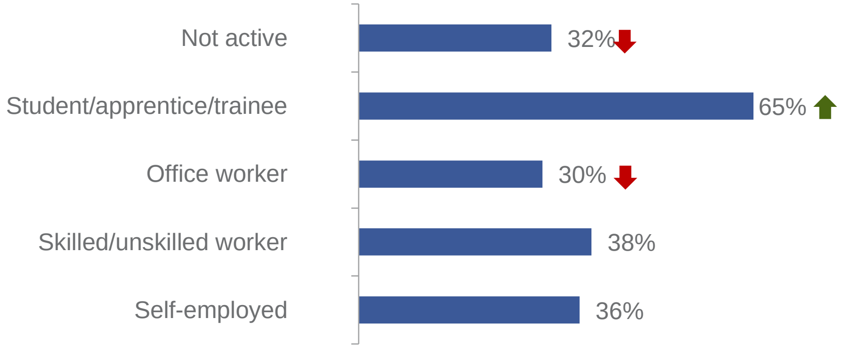
Age



Household income



Occupation



Profiles on Facebook music streamers - Norway

Significant variations – Facebook music streamers veekly+ vs. Non Facebook music streamers weekly+ ⬆

Watch videos containing music on Facebook weekly+
Don't watch videos containing music on Facebook weekly+

	Gone to a concert past 12 months	Average number of concerts past 12 months
Facebook weekly+	65%	3,33
Non Facebook weekly+	57%	3,30

Buy music

	Facebook Weekly+	Non Facebook Weekly+
Music downloads	27% ⬆	15%
CDs	25% ⬆	17%
Vinyl	11% ⬆	7%
Other formats	4%	3%
Haven't bought music	**45%**	**62% ⬆**

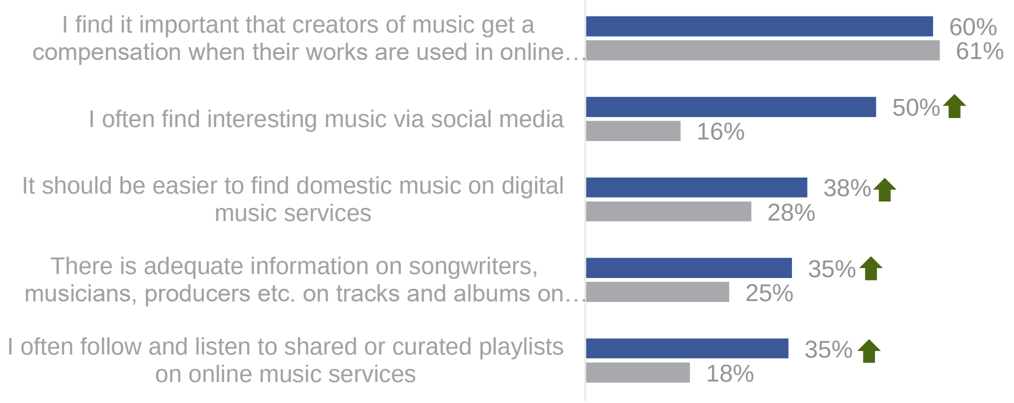
Top 3 music services

	Facebook Weekly+	Non Facebook Weekly+
YouTube	74% ⬆	54%
Spotify	68% ⬆	47%
iTunes	23% ⬆	12%

Top 5 drivers when choosing music service

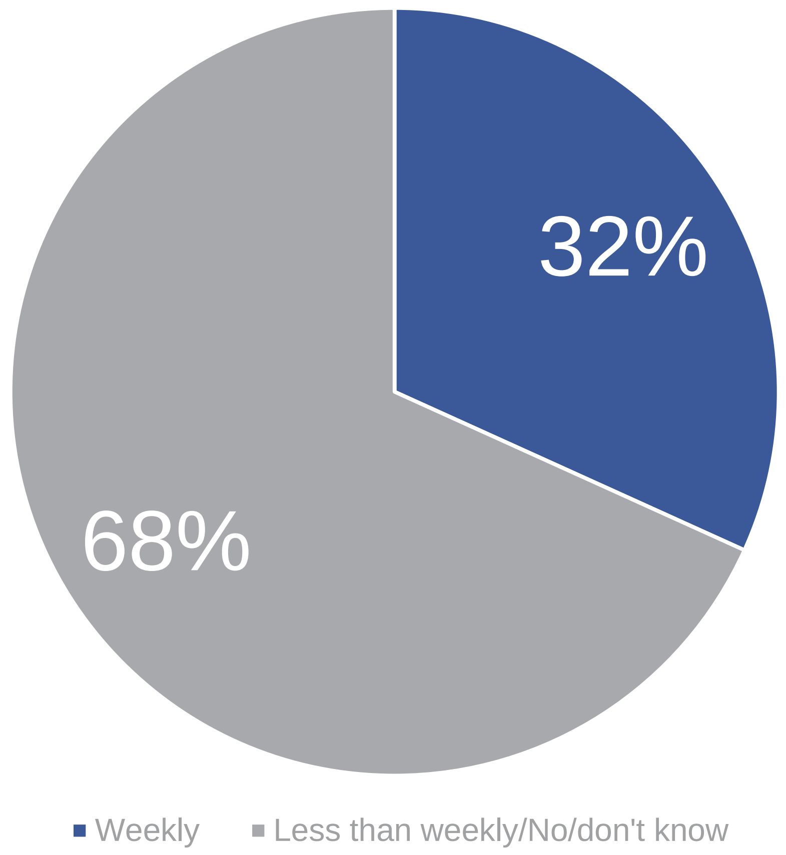
Facebook weekly+		Non Facebook weekly+	
That I have access to all the music I like	53%	That I have access to all the music I like	47%
Ease of use	44%	Ease of use	40%
That the sound is of high quality	43% ⬆	That the sound is of high quality	33%
That the music can be easily used on multiple devices and platforms	35% ⬆	That the service is legal	33%
That the service is legal	34%	That it's free	29%

Top 5 Statements
(agree/strongly agree)



Streamers on Facebook - Finland

1/3 of Finns watch music videos or video containing music on Facebook at least weekly



We'll profile Finns who watch videos with music content on Facebook at least weekly

Q15a In the past 12 months, have you watched a music video or a video that contained music via these?
Base: All

Profiles on Facebook music streamers - Finland

Significant demographic variations on Facebook weekly+ streamers

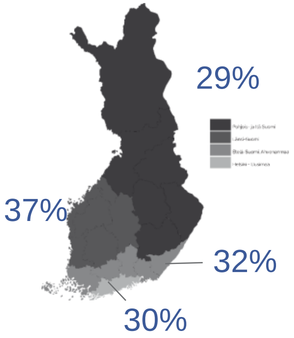
Watch videos containing music on Facebook at least weekly – 32%

Gender

32%

31%

Region



Profile

Demographics:

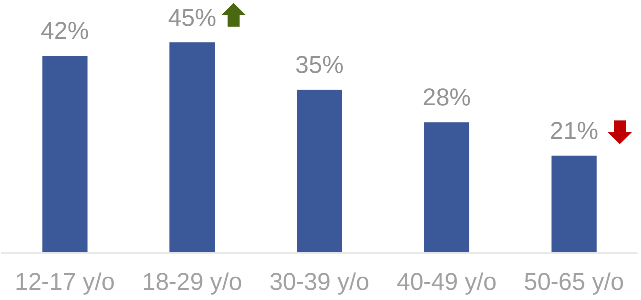
Swedes aged 18-29 years old and students watch more videos containing music on Facebook at least weekly

Behavior/attitudes:

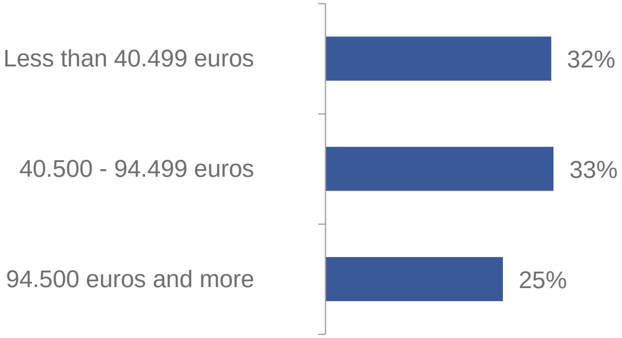
Finns who watch videos containing music on Facebook at least weekly stand out from the rest of the population the following behavior and attitudes:

- higher share of people who attend concerts annually
- buy more music downloads and vinyls
- use more digital music service – especially Spotify
- it's more important for them that they have access to all the music they like and that the sound is of high quality when choosing a music service
- generally agree more on statements related to music streaming – but *not* on the statement about the importance that artists should be compensated when their music are used in online services

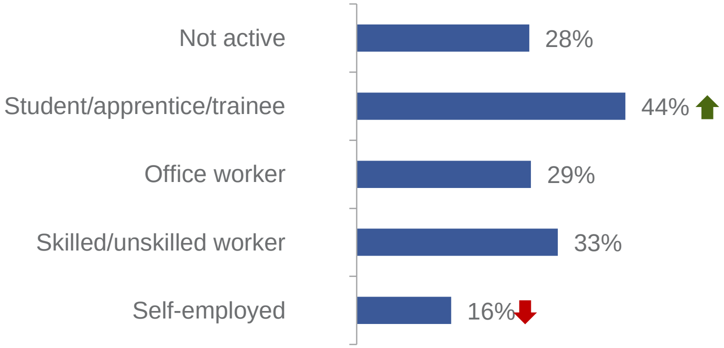
Age



Household income



Occupation



YouGov

Profiles on Facebook music streamers - Finland

Significant variations – Facebook music streamers veekly+ vs. Non Facebook music streamers weekly+ ↑

Watch videos containing music on Facebook weekly+
Don't watch videos containing music on Facebook weekly+

	Gone to a concert past 12 months	Average number of concerts past 12 months
Facebook weekly+	68% ↑	3,20
Non Facebook weekly+	52%	2,99

Buy music

	Facebook Weekly+	Non Facebook Weekly+
Music downloads	19% ↑	21%
CDs	25%	21%
Vinyl	8% ↑	5%
Other formats	5%	4%
Haven't bought music	**56%**	66% ↑

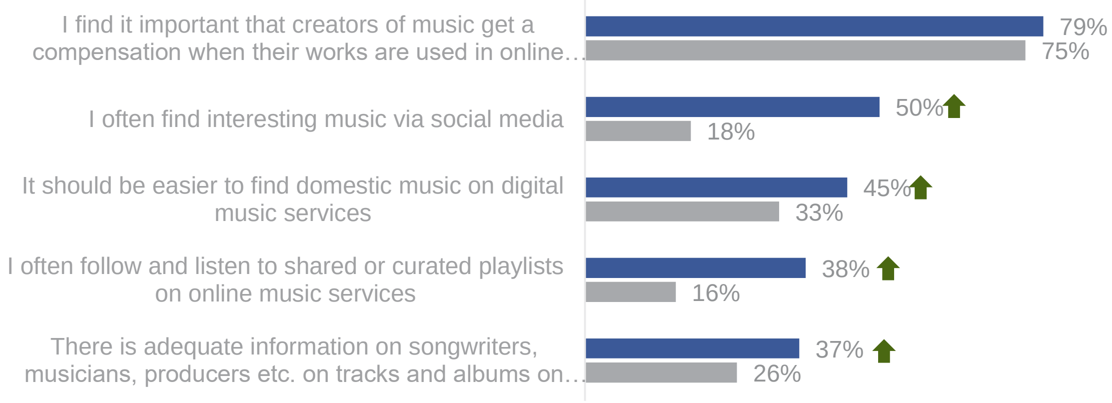
Top 3 music services

	Facebook Weekly+	Non Facebook Weekly+
YouTube	76% ↑	66%
Spotify	61% ↑	39%
iTunes	14% ↑	6%

Top 5 drivers when choosing music service

Facebook Weekly+		Non Facebook Weekly+	
Ease of use	48%	That it's free	46%
That I have access to all the music I like	46% ↑	Ease of use	42%
That it's free	41%	That the service is legal	39%
That the sound is of high quality	41% ↑	That I have access to all the music I like	30%
That the service is legal	39%	That the sound is of high quality	30%

Top 5 Statements
(agree/strongly agree)



YouGov

About YouGov

Meet Your Team

Julie Sophie Schou

Senior Research Consultant

Julie joined YouGov in 2011. She has over 15 years of market research experience and consultancy within a wide variety of industries such as FMCG, TV/Streaming, Professional Organizations, Telecommunications and Medical. Julie is very experienced when it comes to international market research studies, social research, taste tests, product tests, design tests, image and awareness analysis and a broad spectrum of other quantitative analysis methods. Julie has a BA in Anthropology from the University of Aarhus.

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Simon Bugge Jensen

Research Consultant

Simon has worked within market research since 2014 and joined YouGov in 2016. Simon is responsible for conducting quantitative research projects and is responsible for handling the entire research process from developing the questionnaire to the presentation of the results. Simon is experienced with handling all sorts of research projects on behalf of clients representing a wide array of sectors such as FMCG, Retail, and NGO’s. Simon holds an MSc. from Copenhagen Business School.

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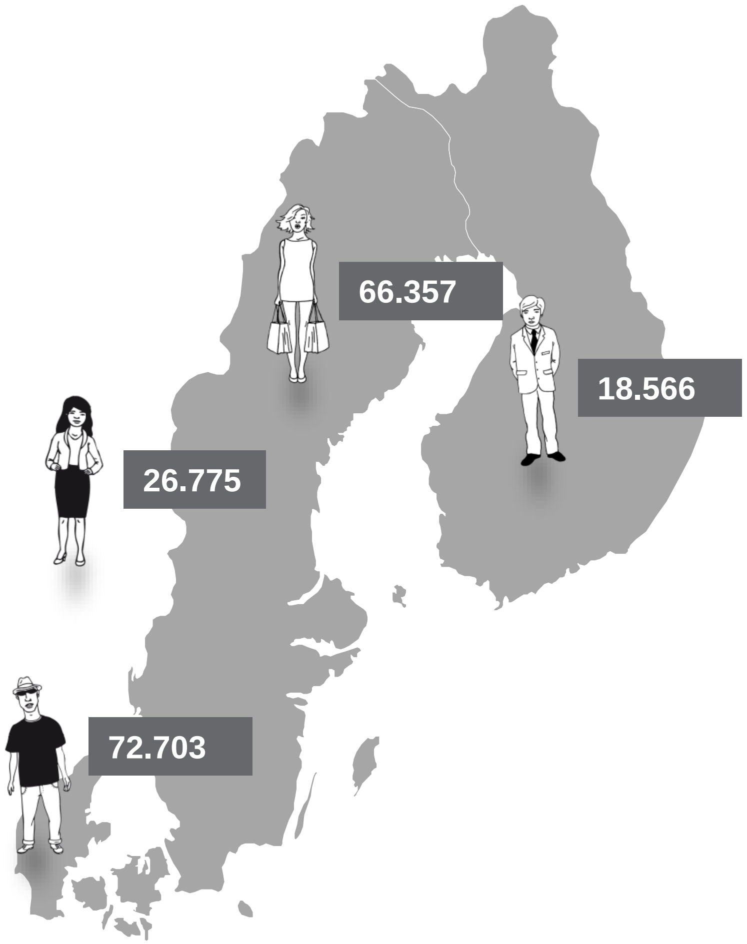
YouGov's panel is the largest consumer panel in the Nordics



Our Nordic panel consists of 180,000 people and broadly reflects the population in each country.

We focus on high validity in the panel. This is done by recruitment through many different channels as well as continuous quality control.

Daily, we are in dialogue with your panelits

- Demographics
- Politics
- Brand usage & perception
- Media
- Consumer & lifestyle
- Personality & health

We collect information from more than four million respondents in our panels worldwide.

The result is the world's most comprehensive database with information about everything from demographics, lifestyle, brand usage, social media etc.

YouGov by the Numbers

YOUGOV BY THE NUMBERS

4 million
NUMBER OF PEOPLE WHO PARTICIPATE IN THE YOUGOV PANEL WORLDWIDE

>2,500
NUMBER OF POLITICAL, CULTURAL & COMMERCIAL CLIENTS SERVED IN FY16

2000 YEAR YOUGOV FOUNDED IN UK

28
NUMBER OF YOUGOV OFFICES WORLDWIDE

600
NUMBER OF YOUGOV EMPLOYEES WORLDWIDE

#1
YOUGOV IS NAMED THE MOST QUOTED SOURCE IN THE DK

21 MILLION
NUMBER OF SURVEYS COMPLETED IN FISCAL YEAR 2016

37
YOUGOV HAS A PROPRIETARY PANEL OF 4M PEOPLE ACROSS 37 COUNTRIES