



Polaris Nordic

Digital Music in the Nordics

Maj 2022

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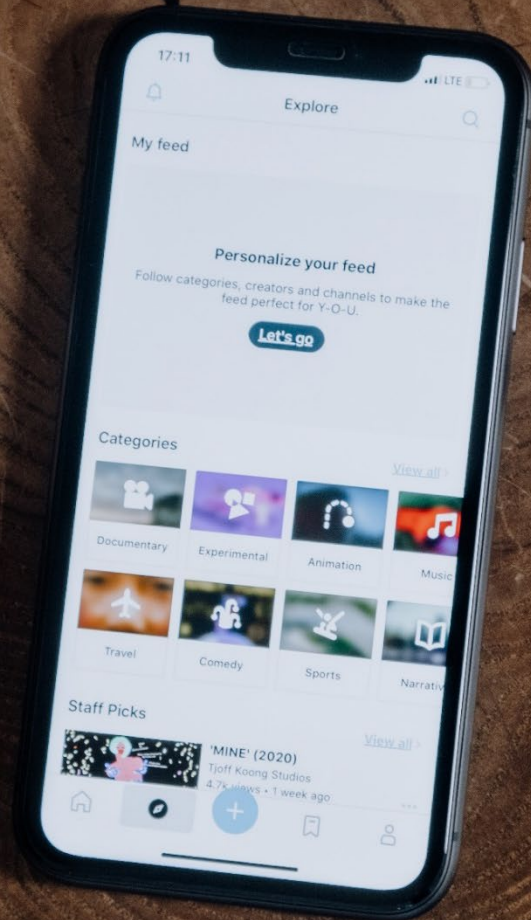
Background

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



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, resting on a light-colored wooden surface. A white charging cable is plugged into the bottom of the phone, and a white earphone is lying next to it. 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

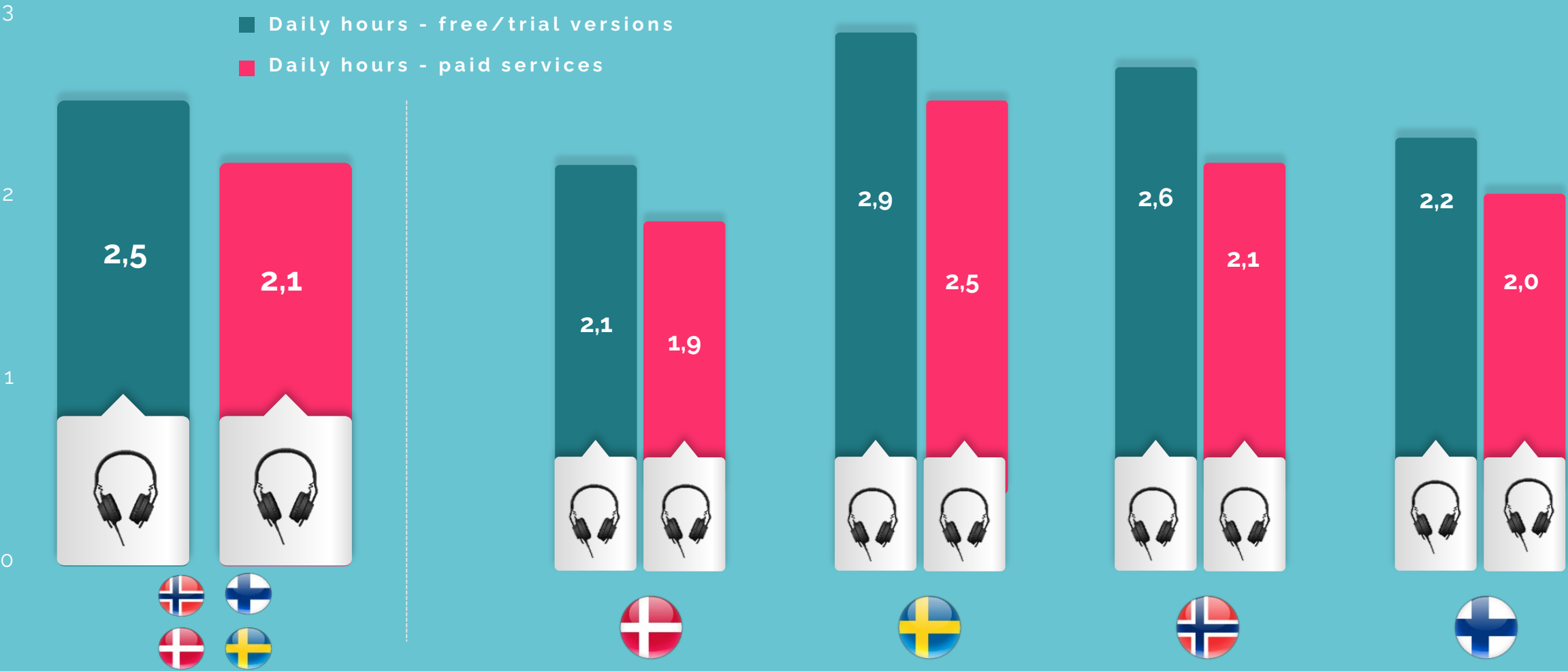


Average music
streaming time per
day (among streamers)



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%



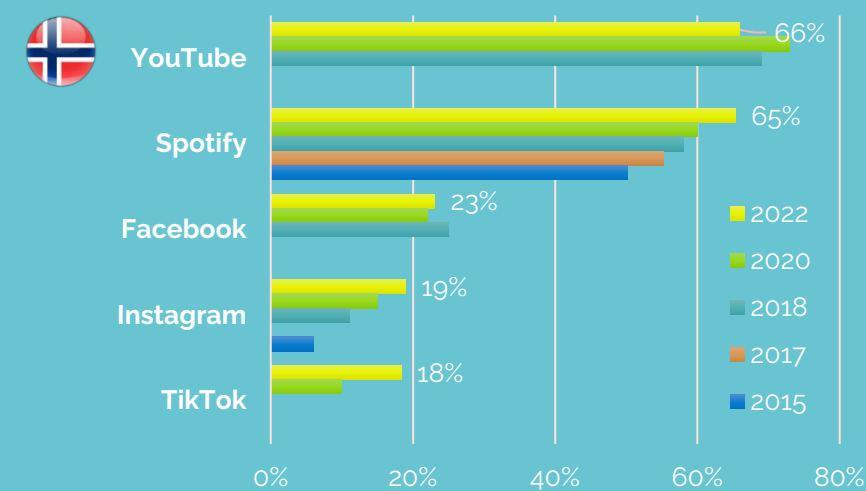
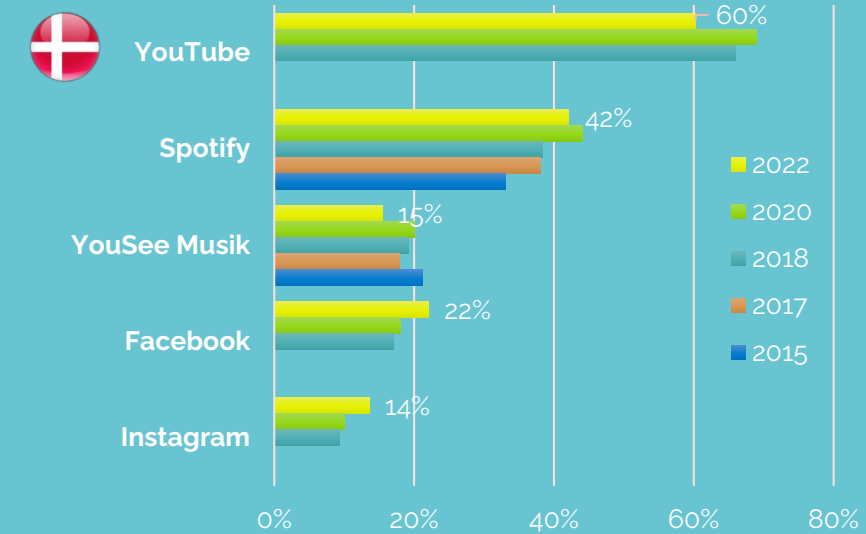
38%



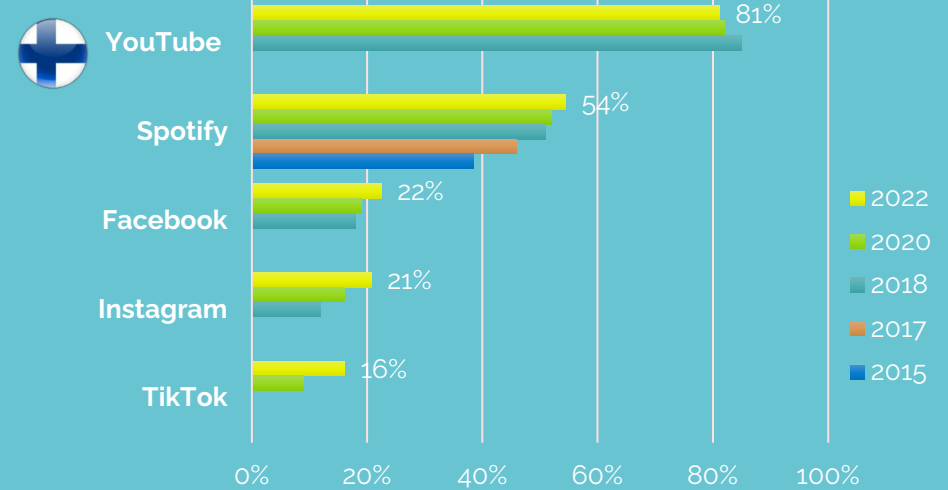
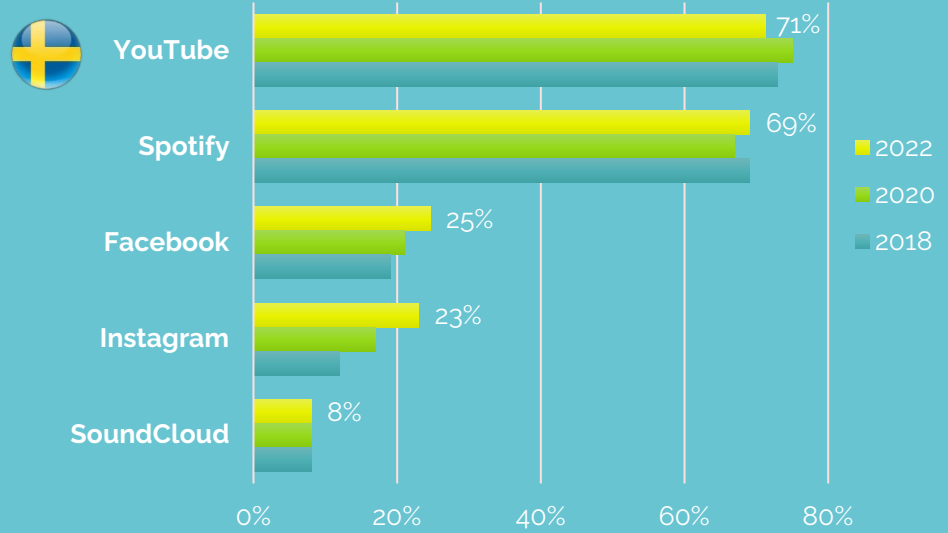
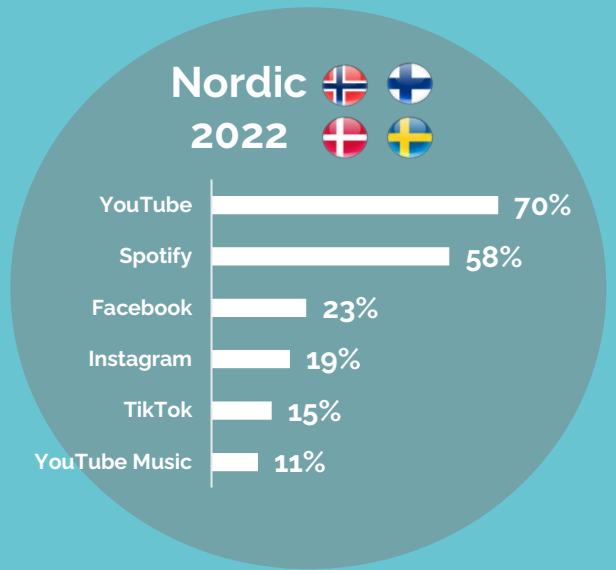
- ✓ No gender differences
- ✓ More aged 50-65 and fewer aged 18-29
- ✓ More in the lowest income groups
- ✓ More Finns than Danes, Norwegians, and Swedes
- ✓ Less frequent online concert goers
- ✓ Are more unlikely to watch/listen to one or more online live concerts within the next 12 months
- ✓ Less 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



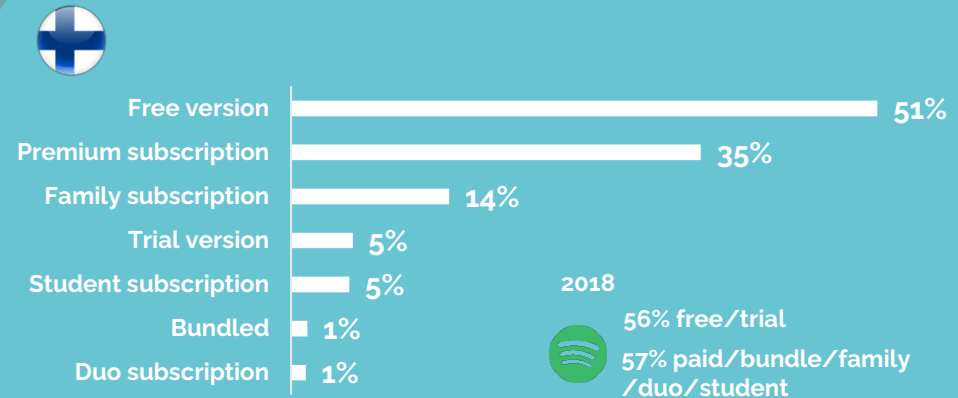
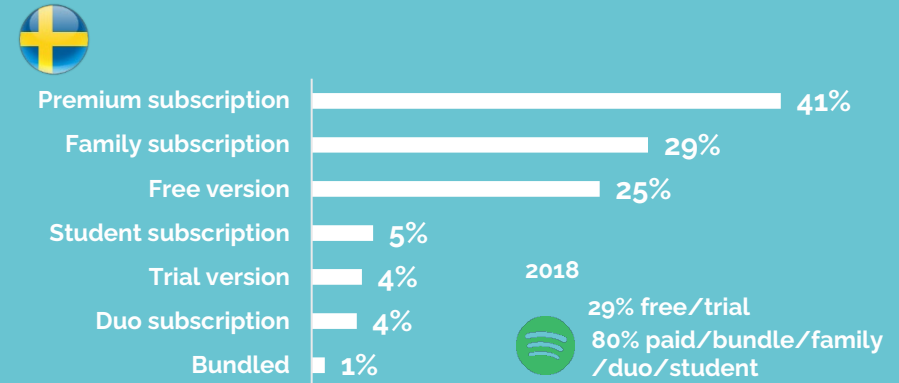
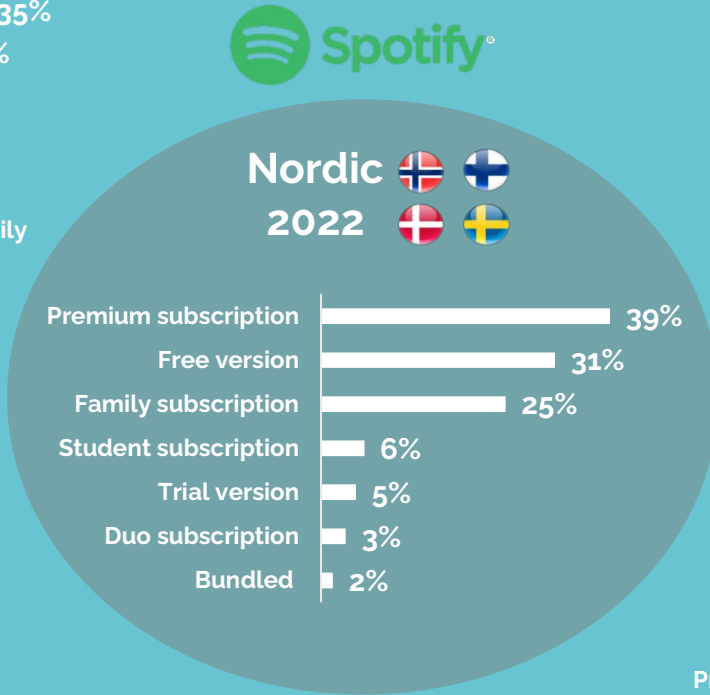
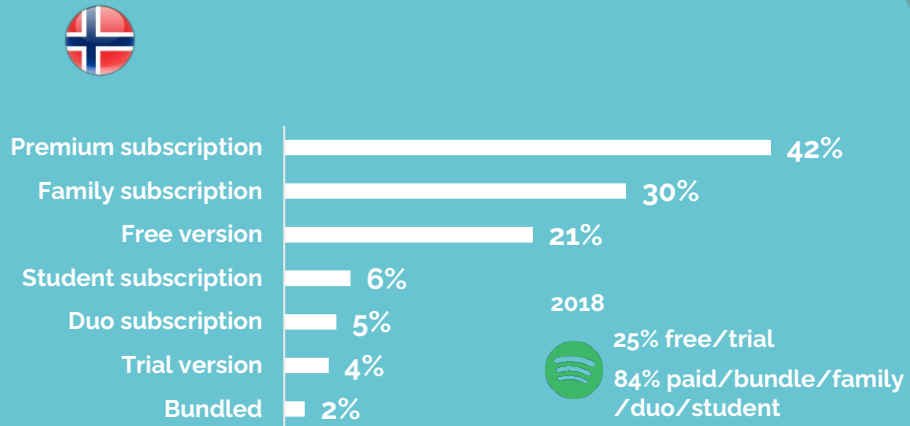
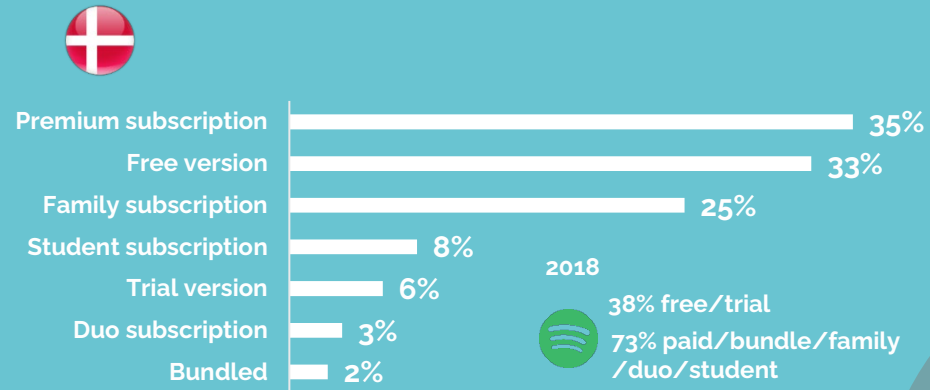
Q7a Which of the following digital music services do you use when listening to music?
Base: All



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

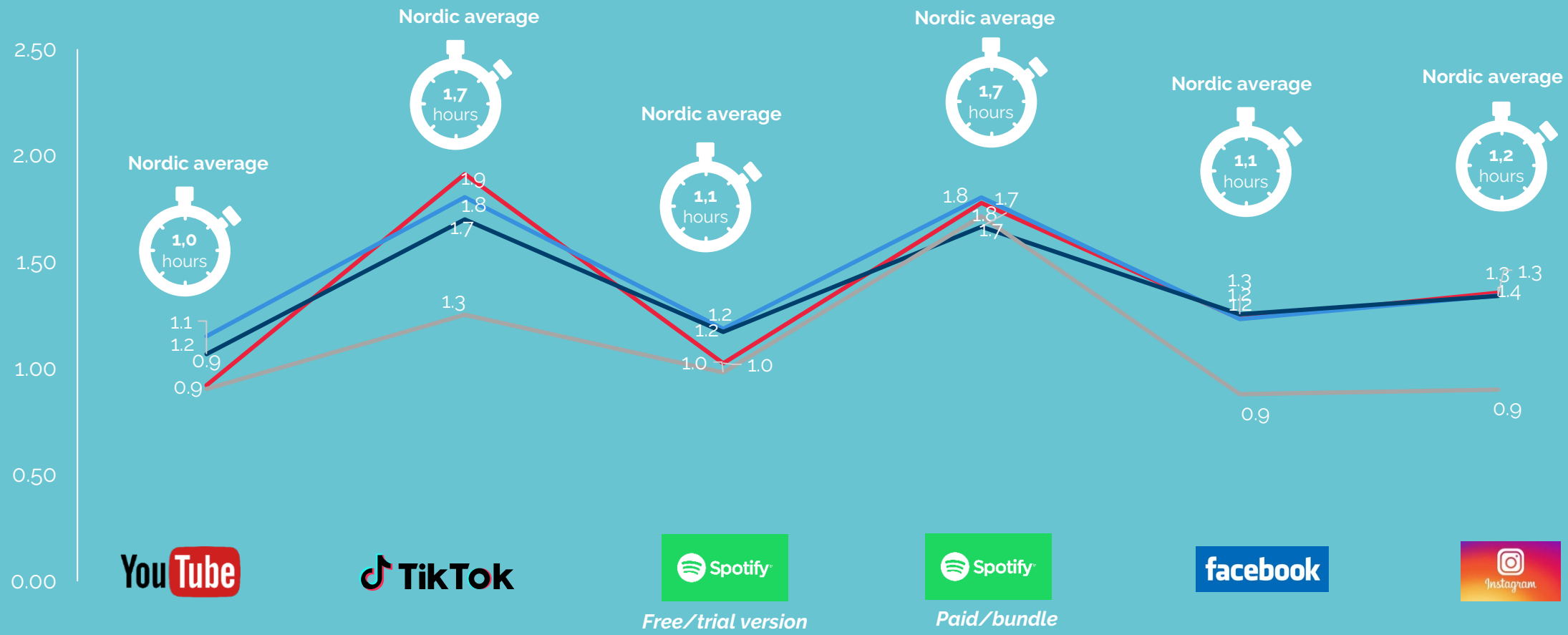


 Spotify usage

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

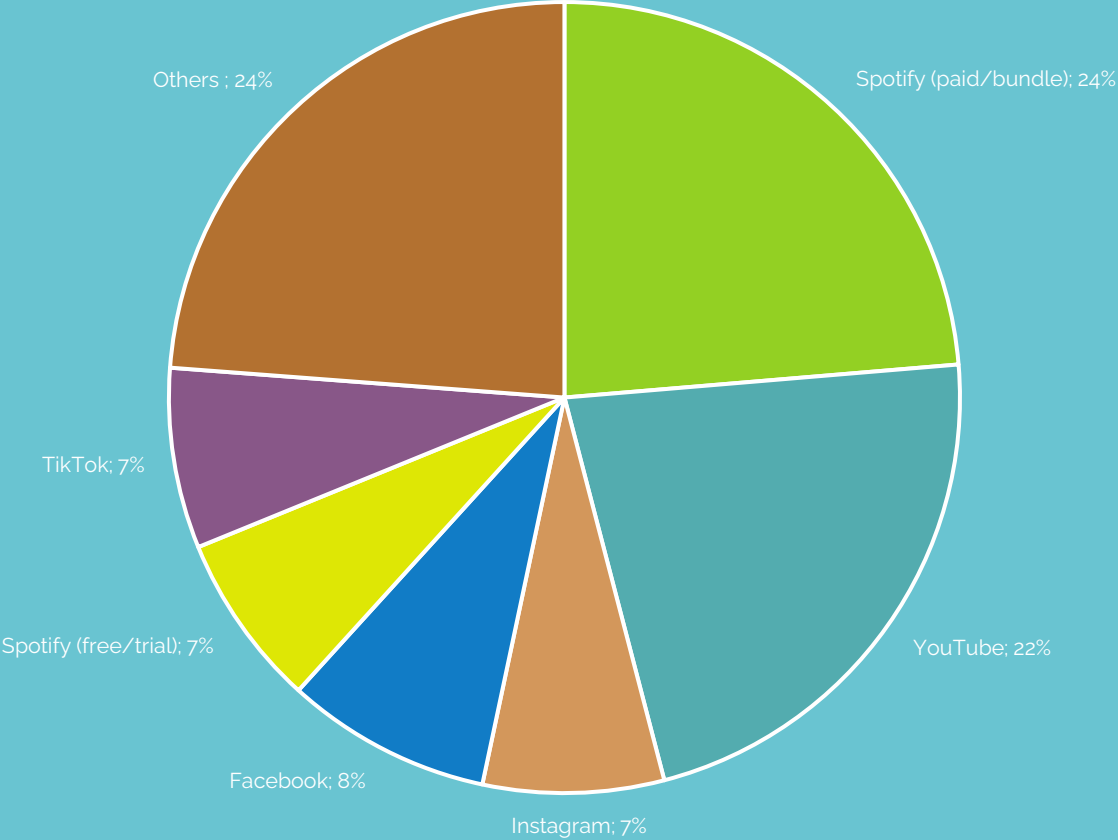


Q8a In a typical week, how many hours per day do you spend listening to music or watching music videos on the following digital services?
Base: Use digital service to listen to music

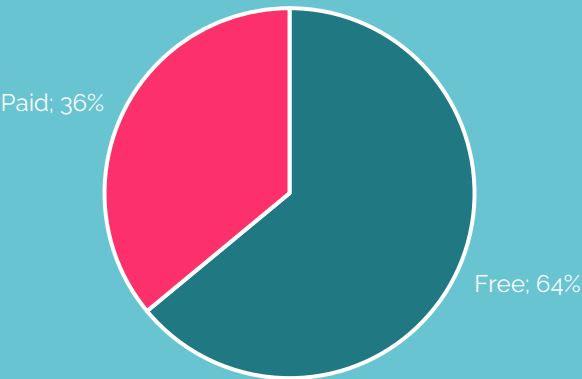
Daily time spent on the audio and video services used for streaming of music – Nordic overview

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

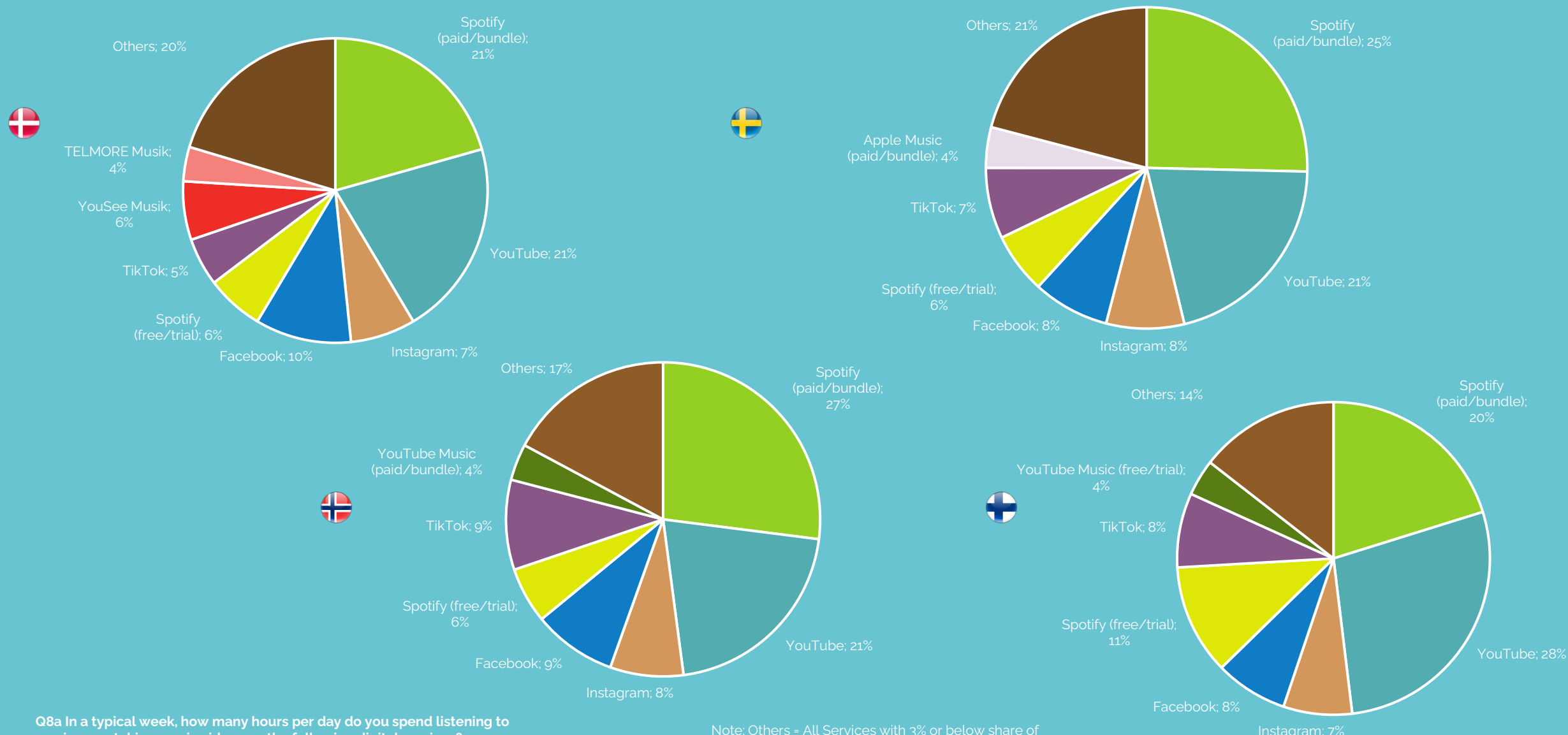


Share of time used on paid vs. free music streaming:



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:



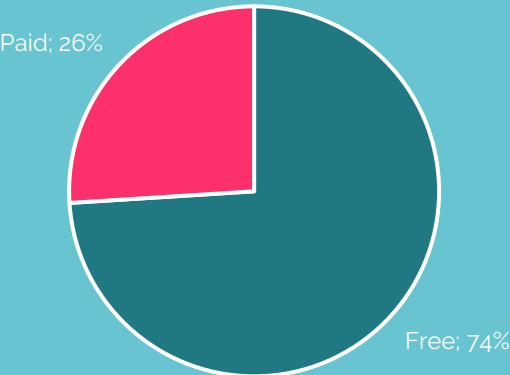
Share of time used on paid vs. free music streaming:



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



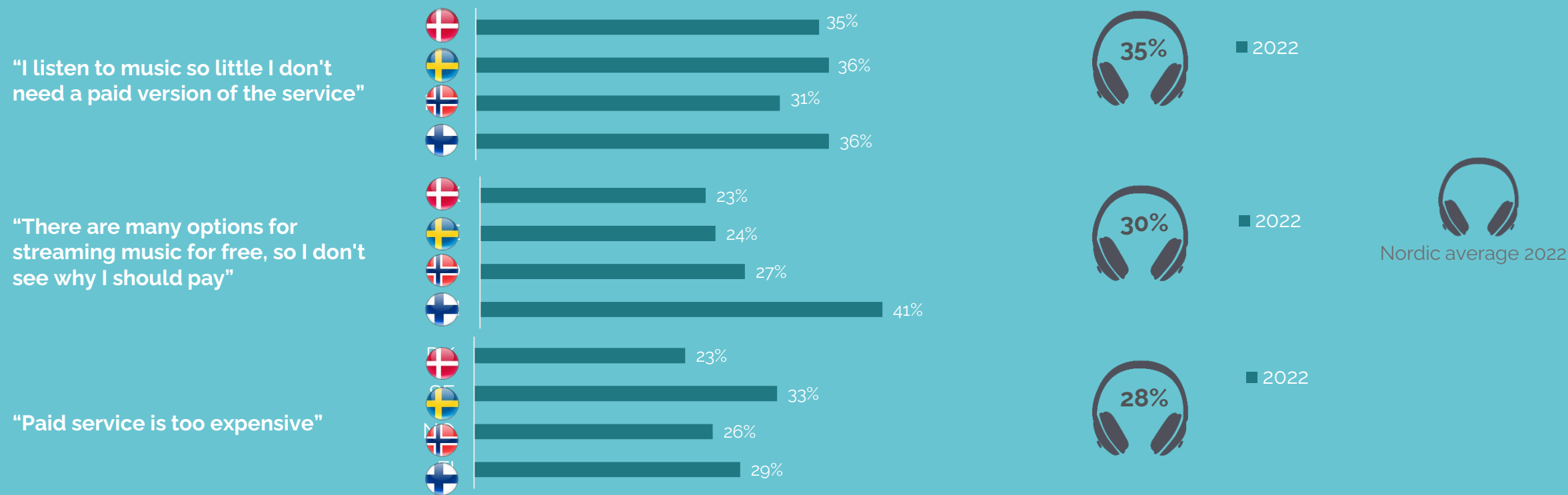
Share of time used on paid vs. free music streaming:



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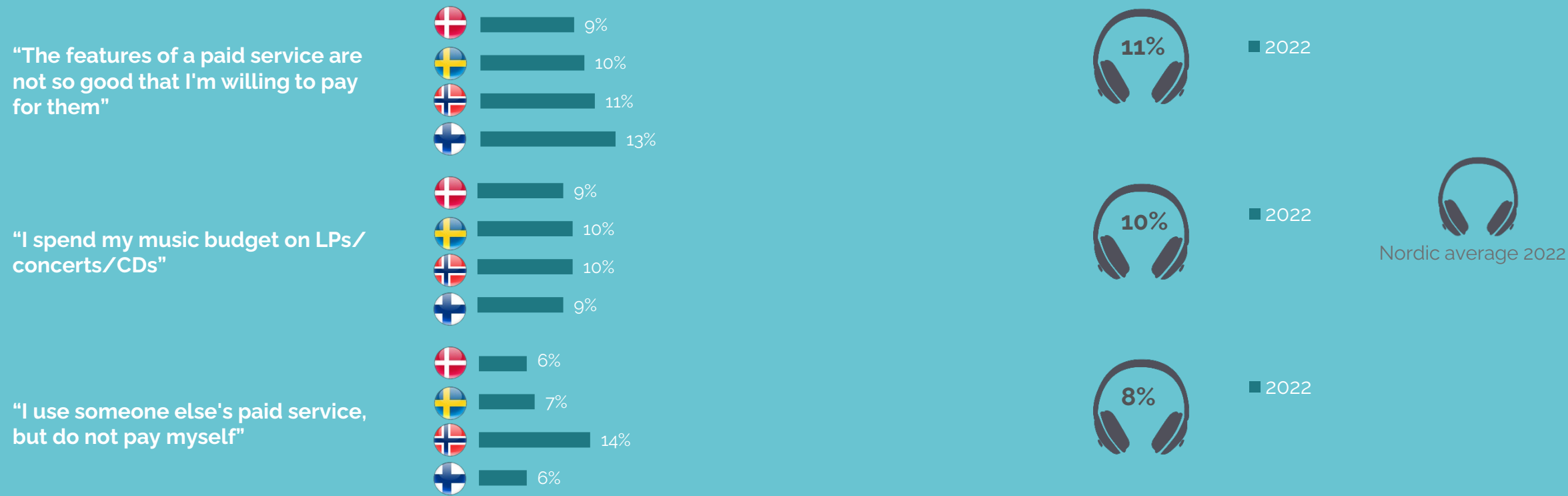
Reasons to not subscribe to a music streaming service – Nordic and countries

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

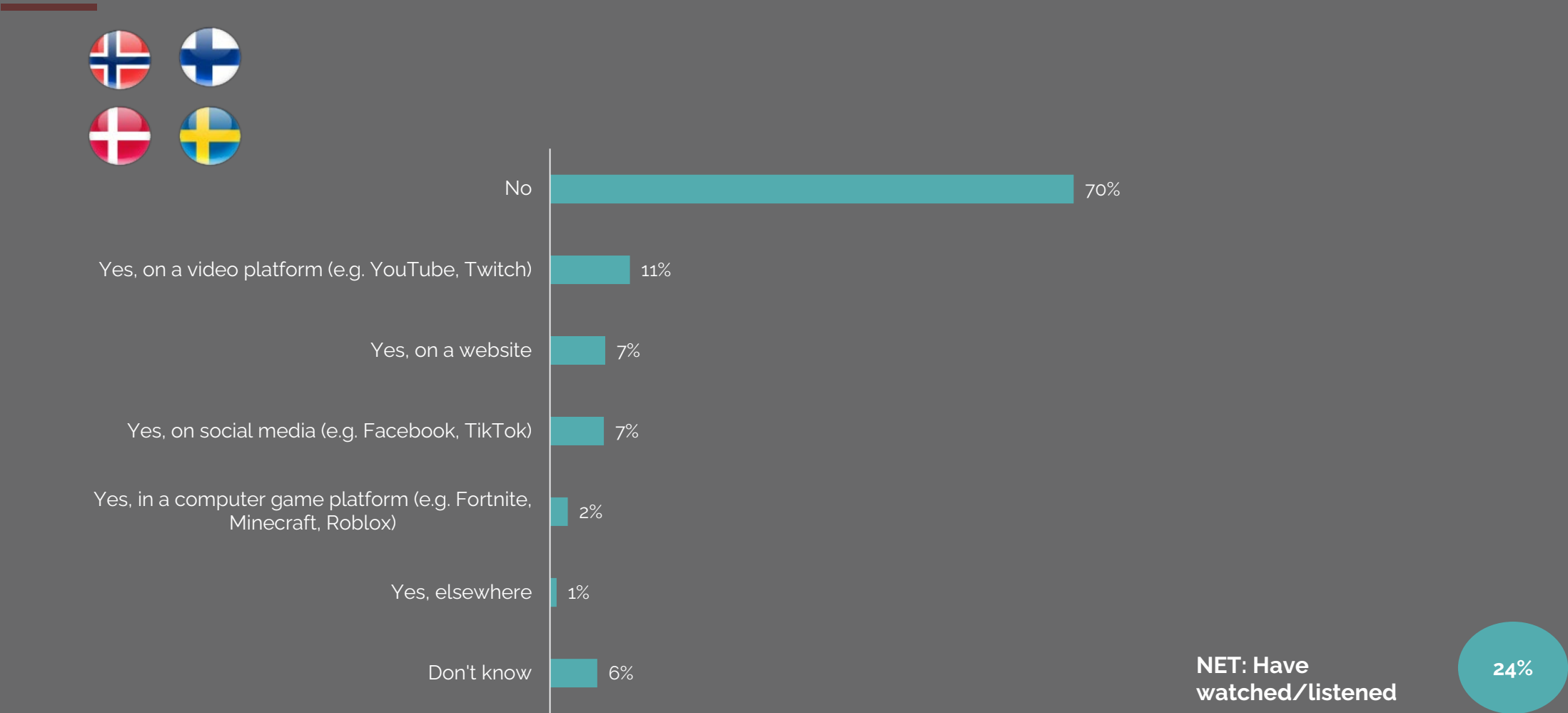
1 in 10 think that the quality of the service are too low to pay, or they spend their money for music on LPs/ concerts/CDs instead. Finally, some use somebody else's paid service - this number is slightly increasing.



Behavior



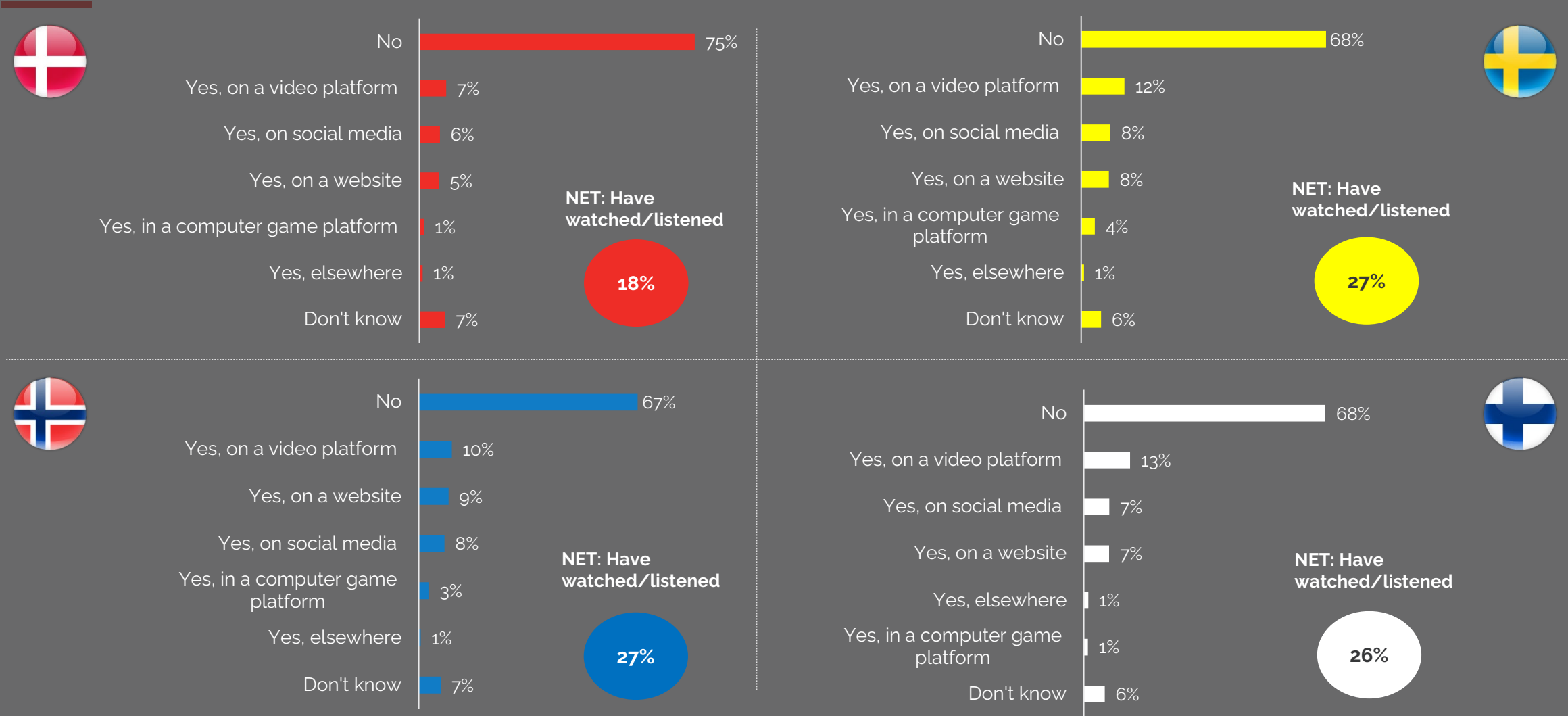
The majority of people across the Nordics have not watched/listened to an online live concert



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

Online Live Concerts – Countries

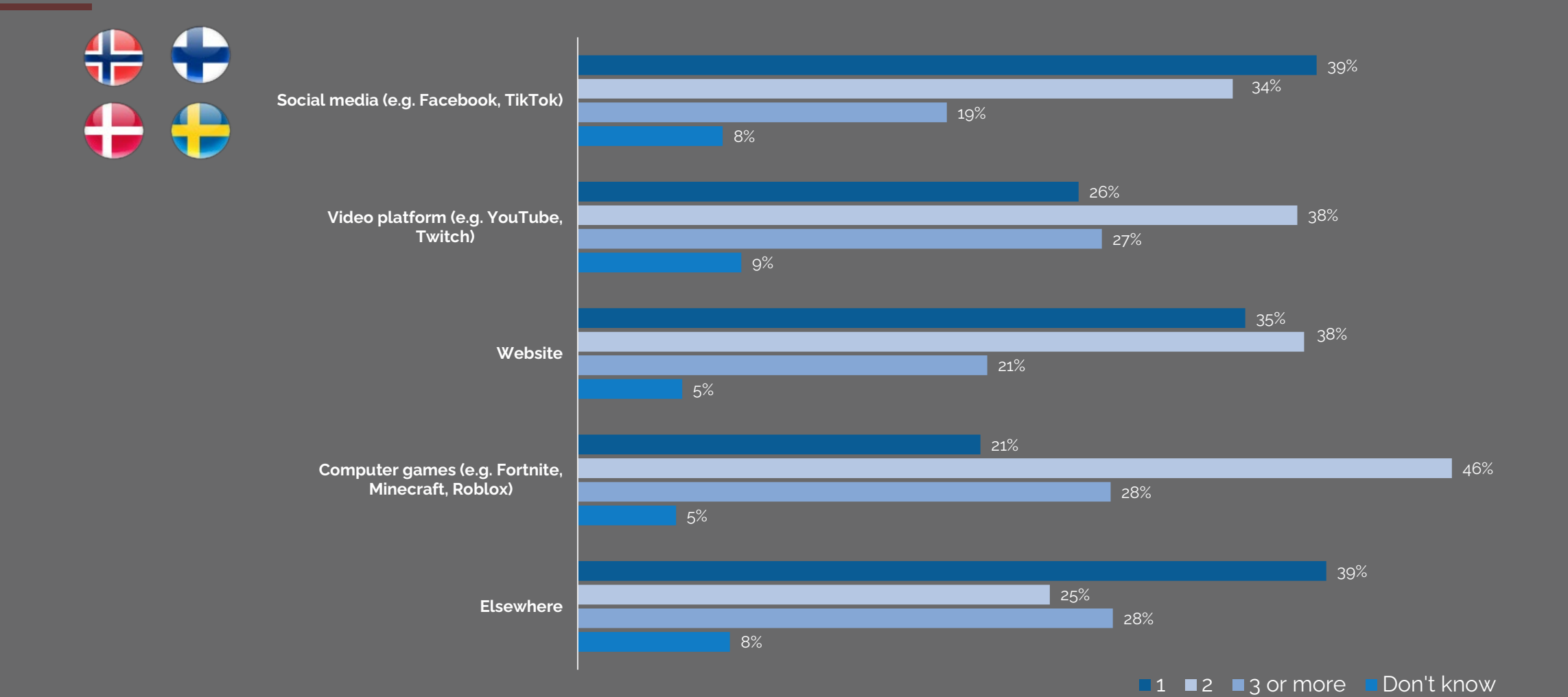
Sweden, Norway and Finland are at the forefront in attending online live concerts whereas in Denmark 3 in 4 have not tried



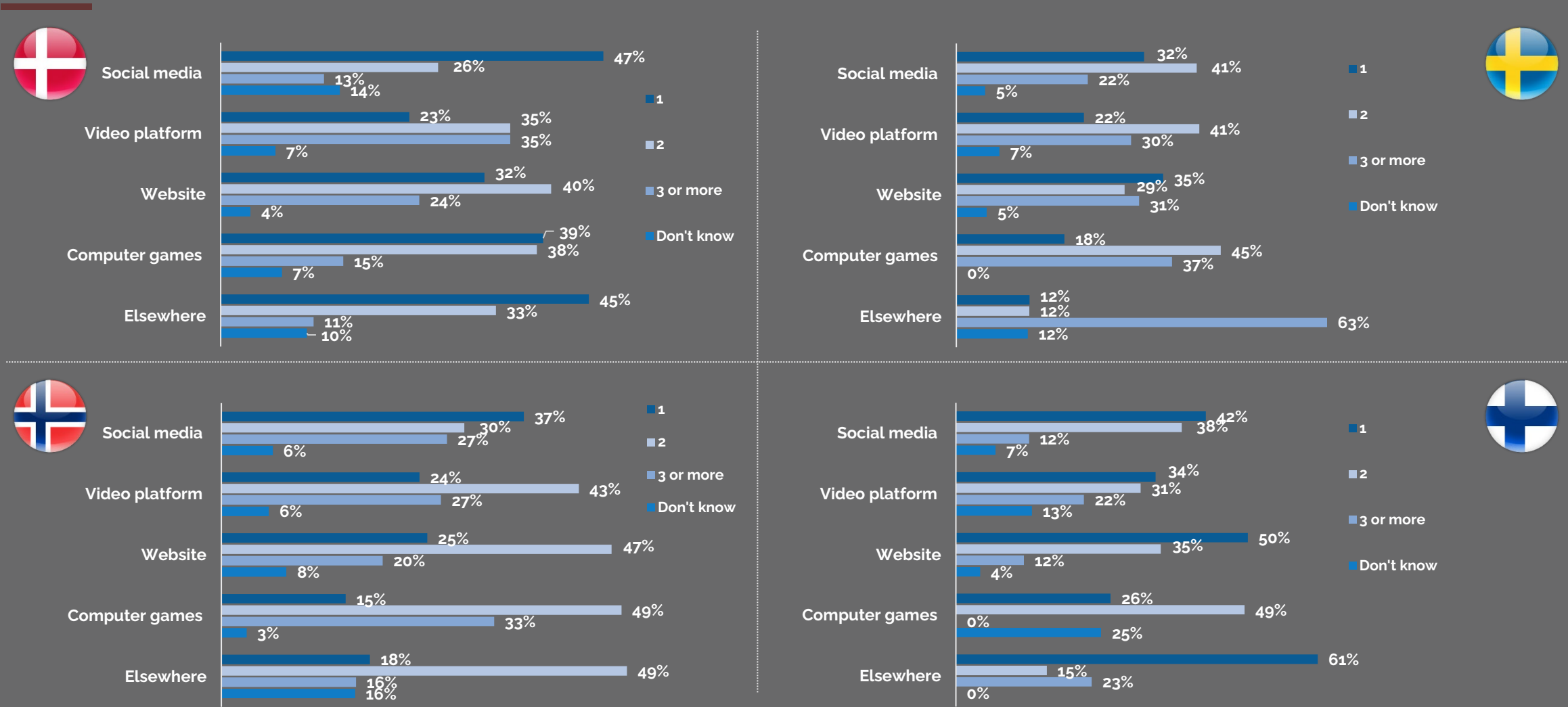
Q30 Have you watched/listened to a live concert online in the last 12 months
Base: All

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

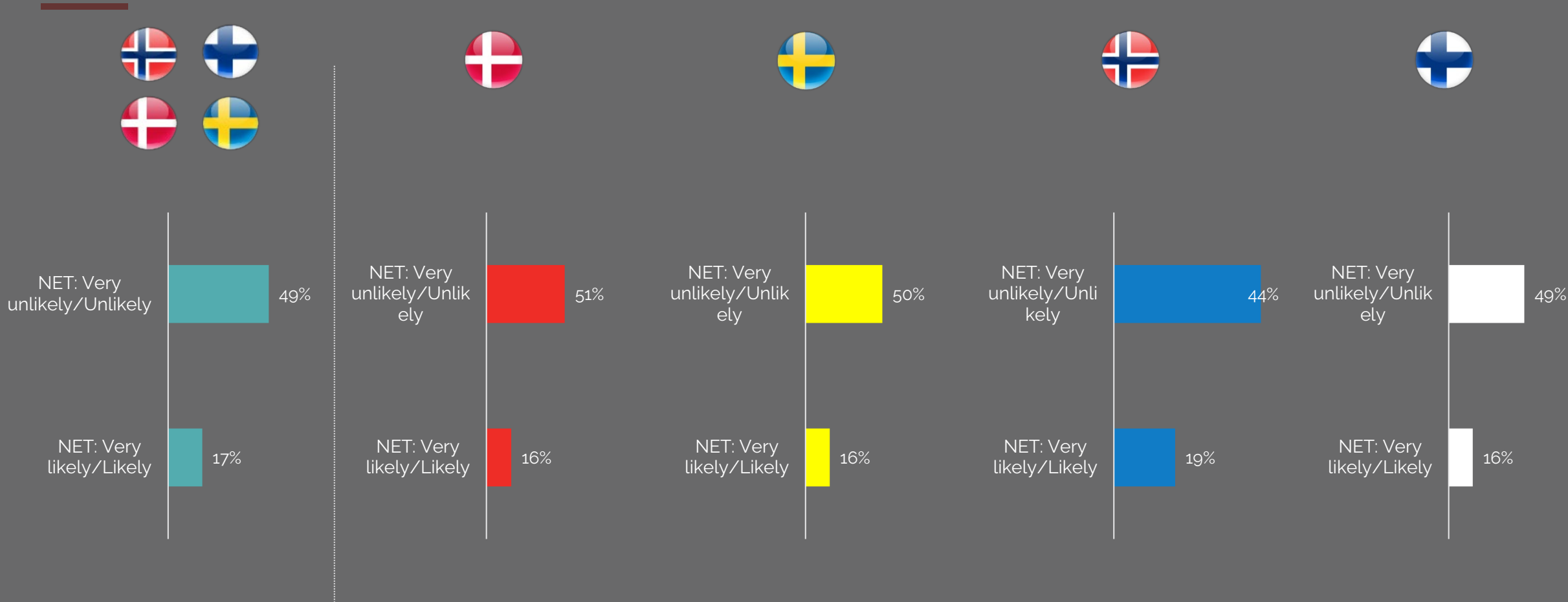


Gamers across the Nordics are heavy users, but they are a very small community

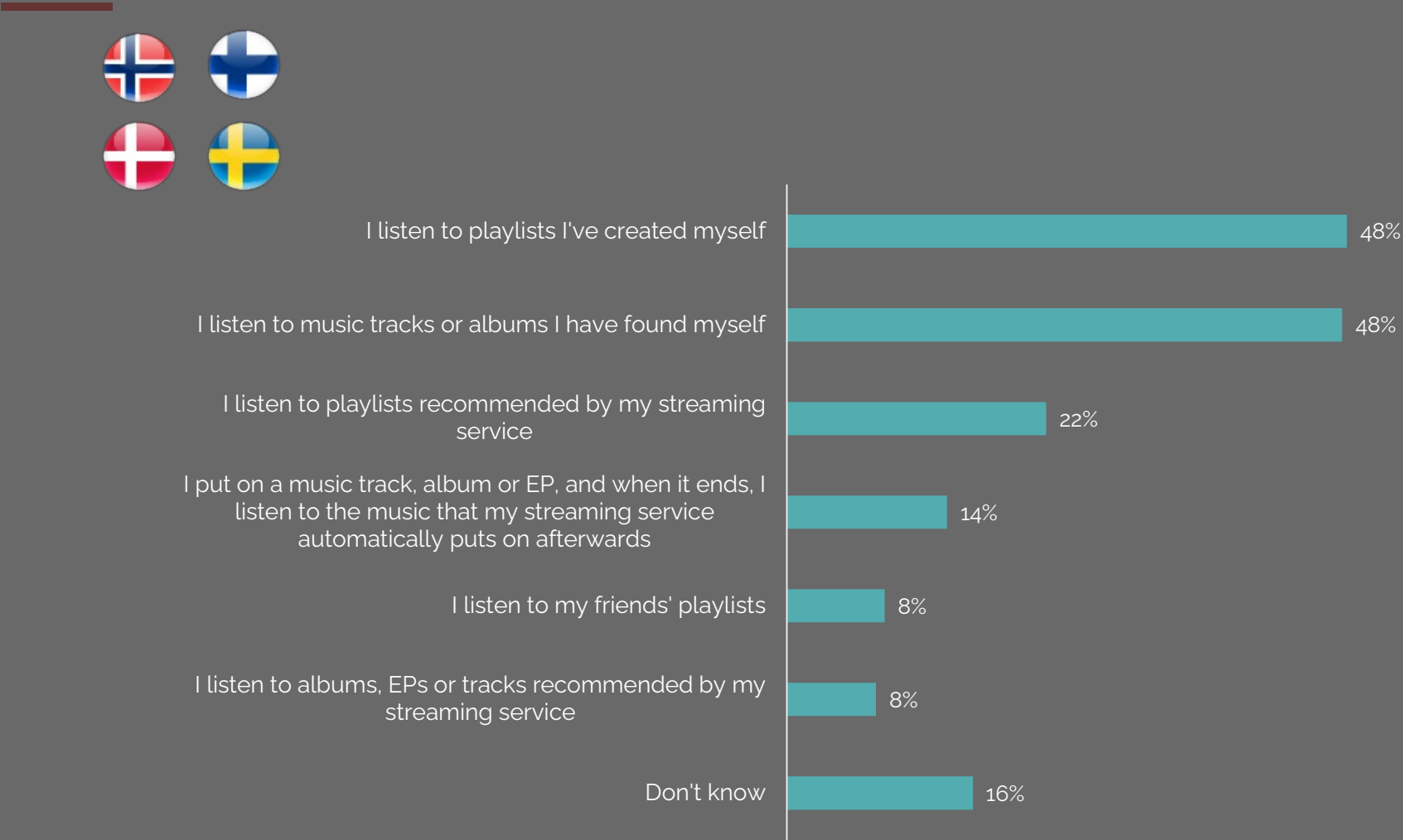


Q31 How many times have you watched/listened to a live concert online during the last 12 months on the following?
Base: Have you watched/listened to a live concert online

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



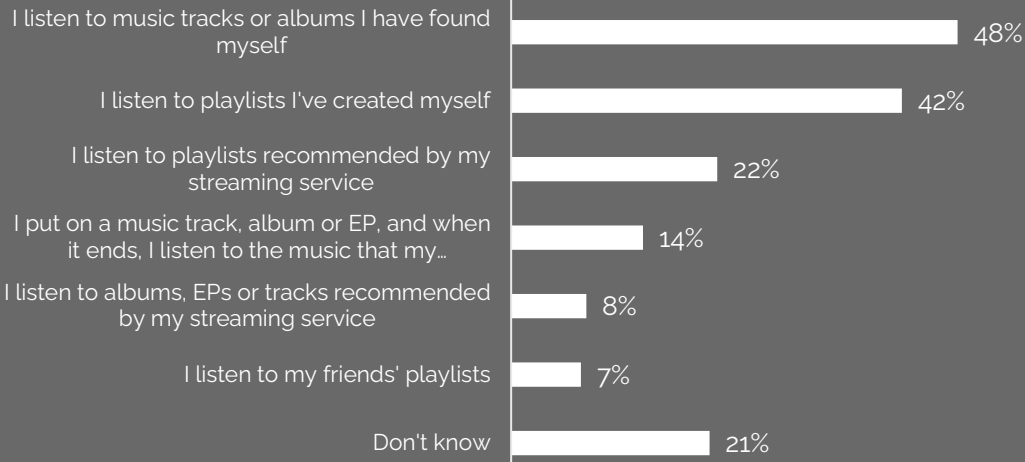
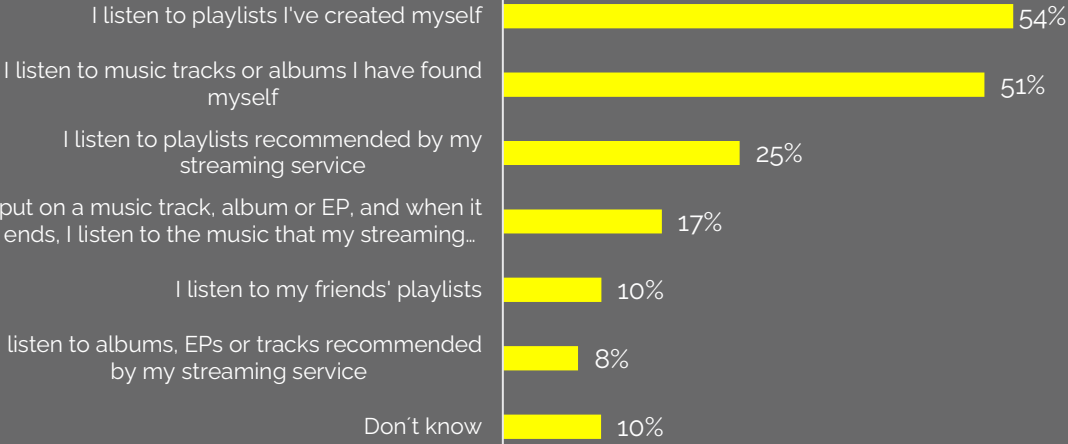
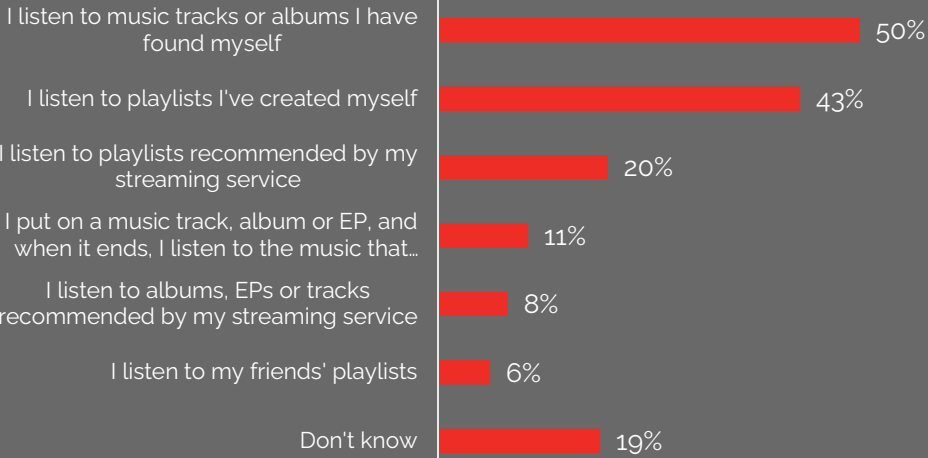
Across the Nordics, people prefer to listen to playlist or tracks they have found themselves



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

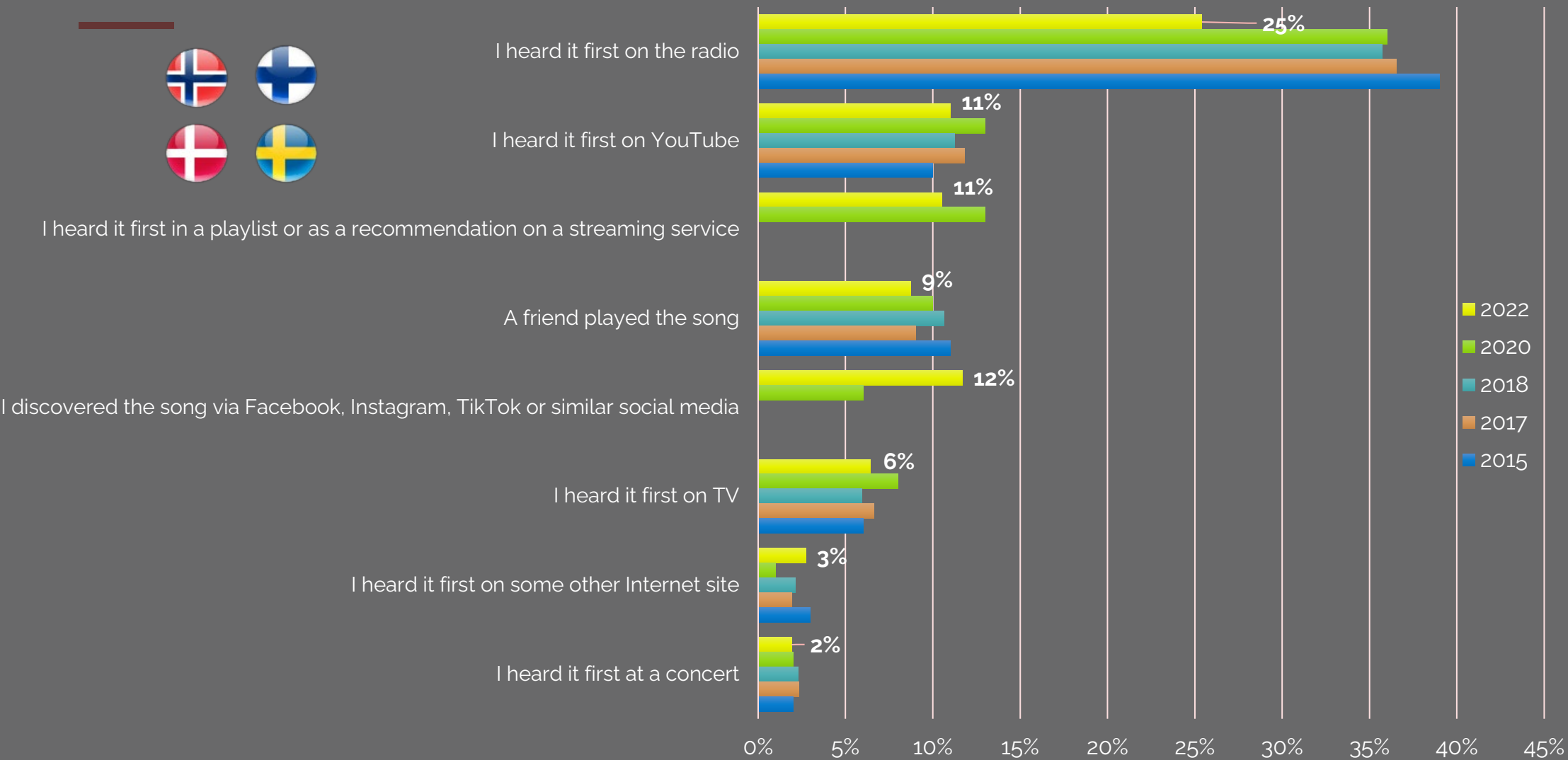
Online Live Concerts – Countries

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



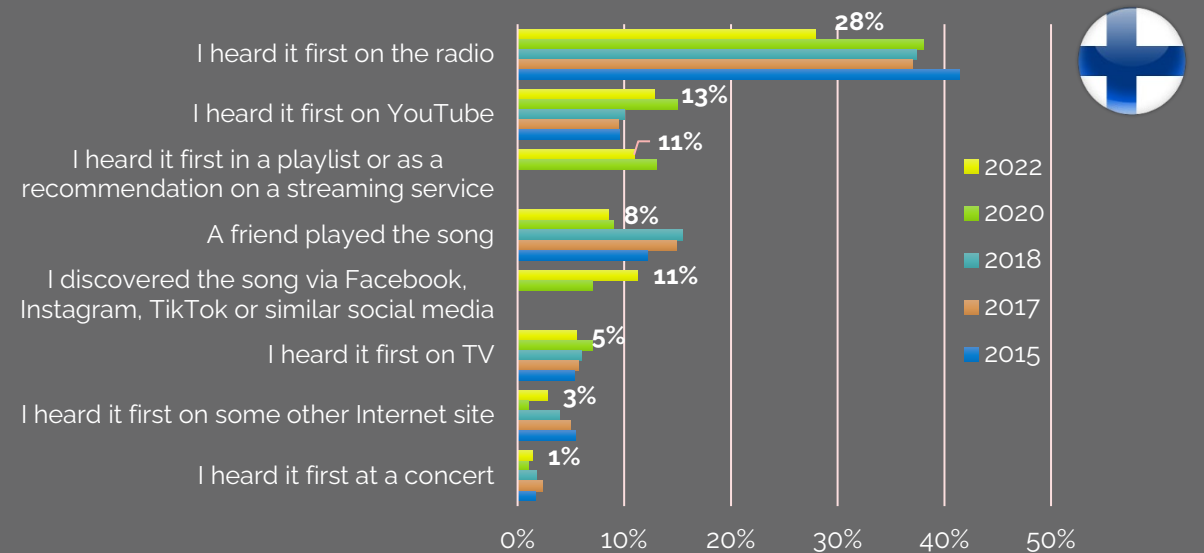
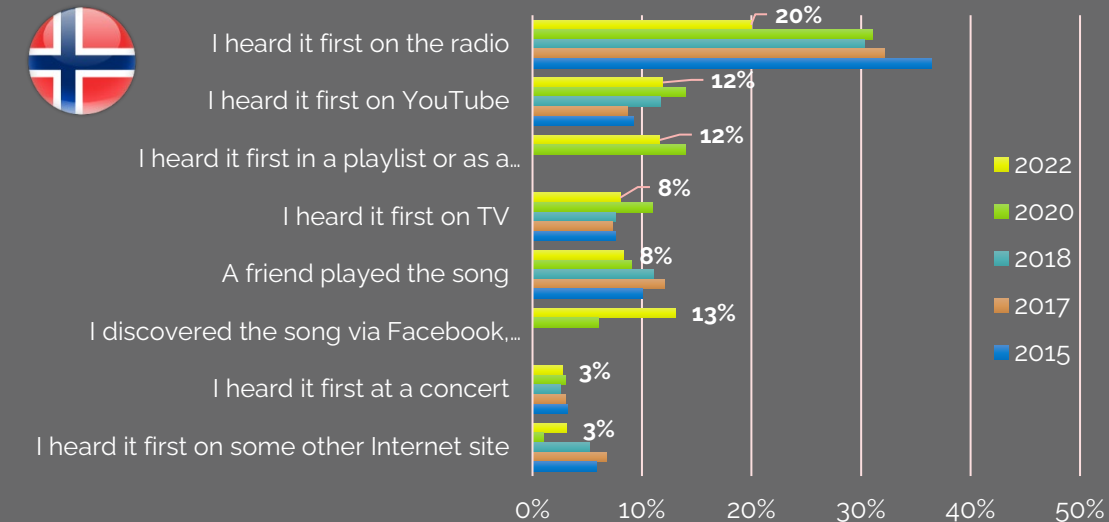
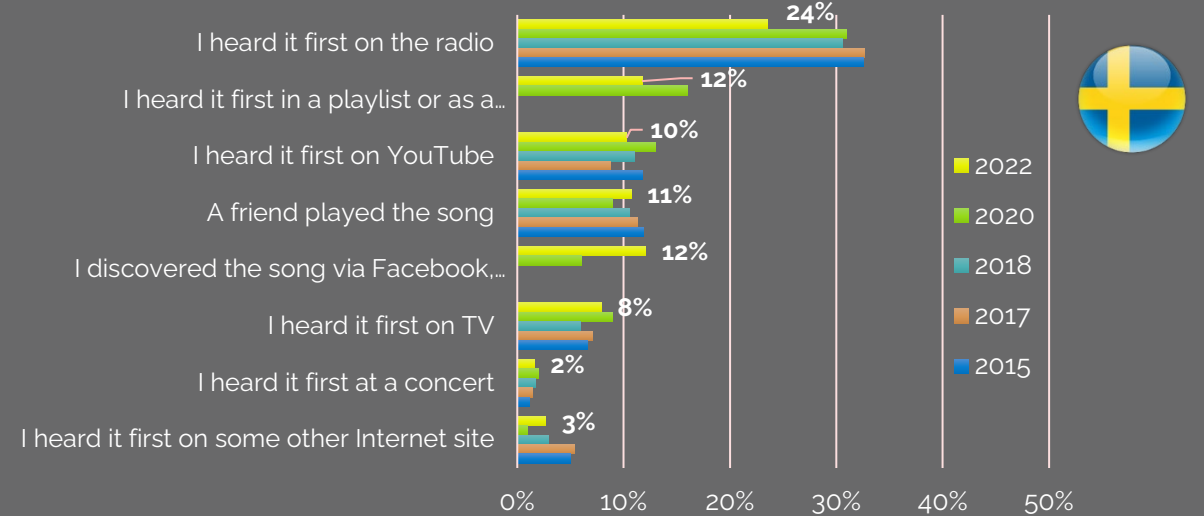
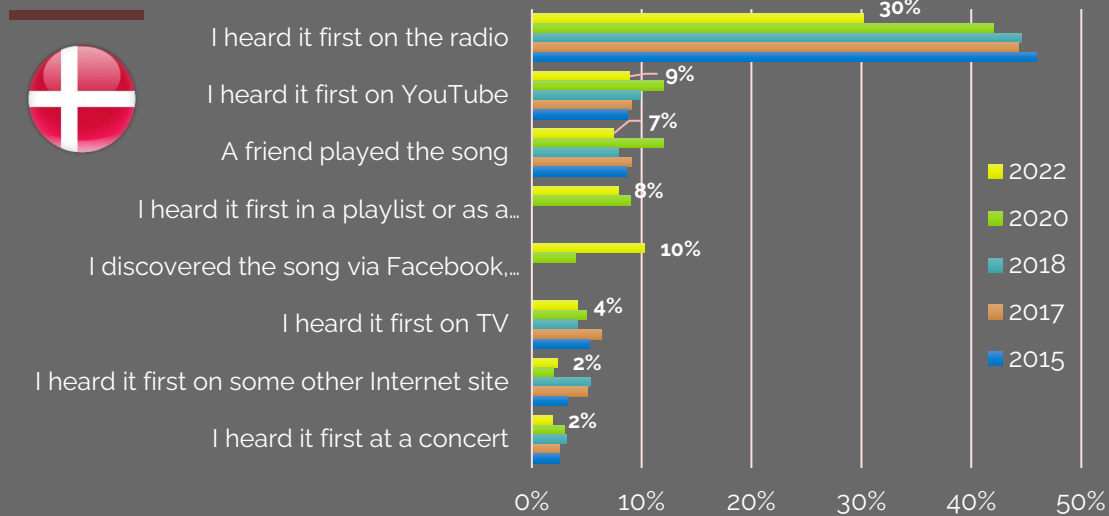
Q10 When listening to music on your digital music service, which of these statements best suits your daily consumption?
Base: All.

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



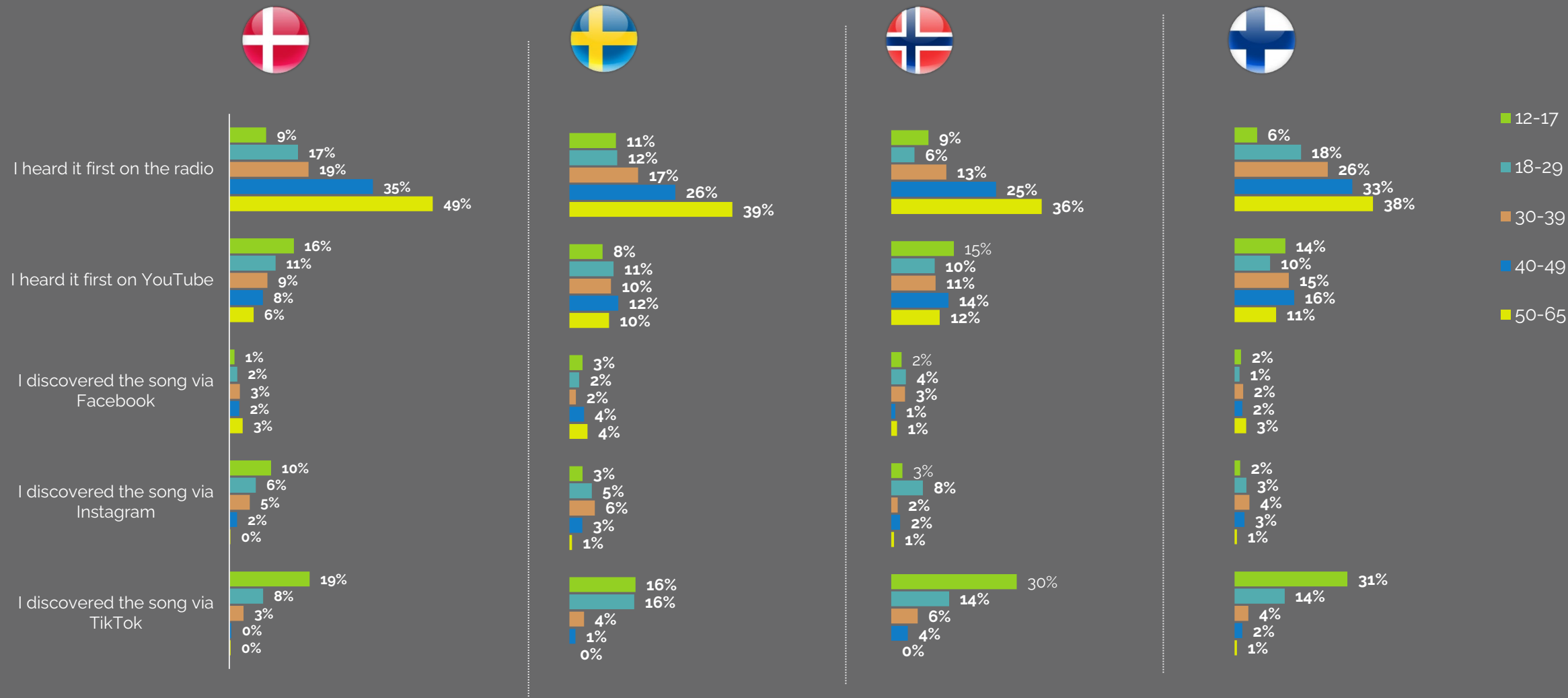
Channels where a new song was discovered - countries

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



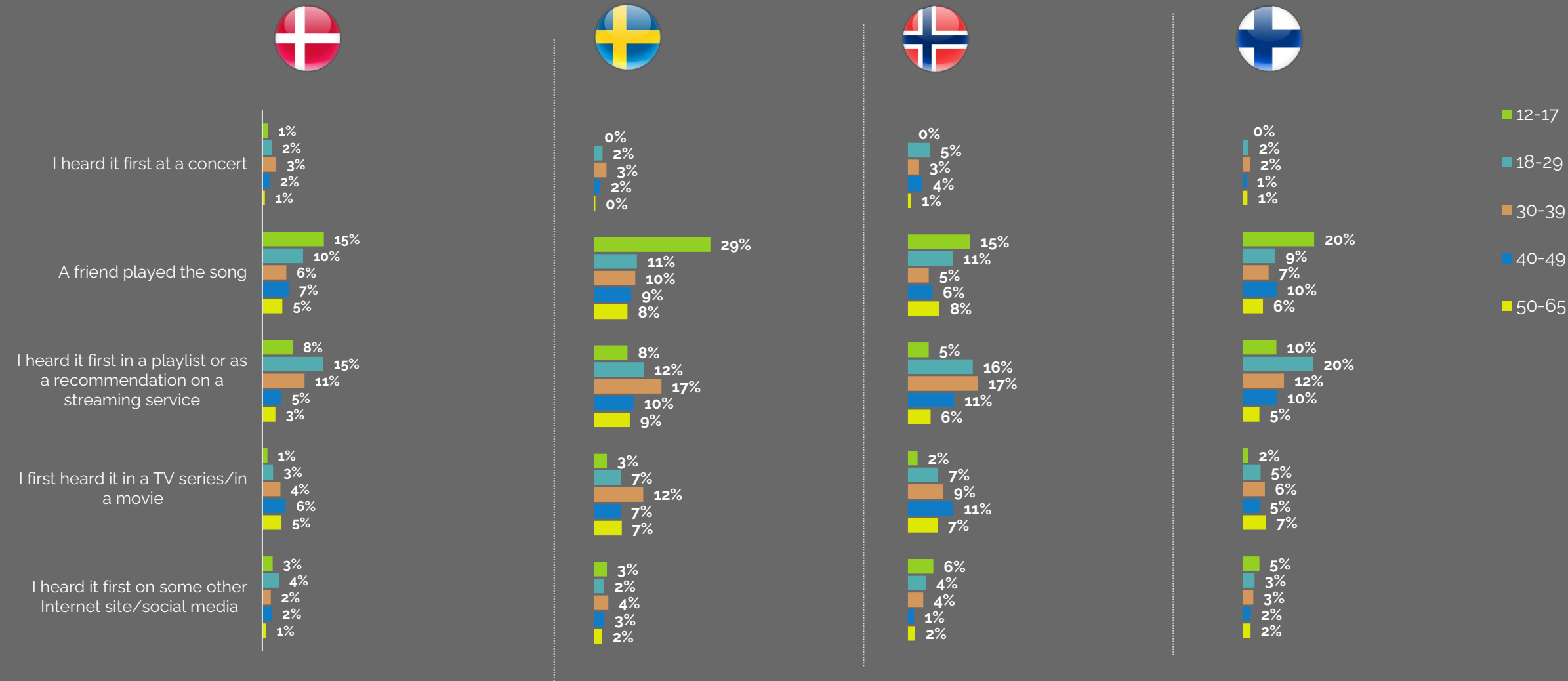
Channels where a new song was discovered – by age

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



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





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

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

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

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

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

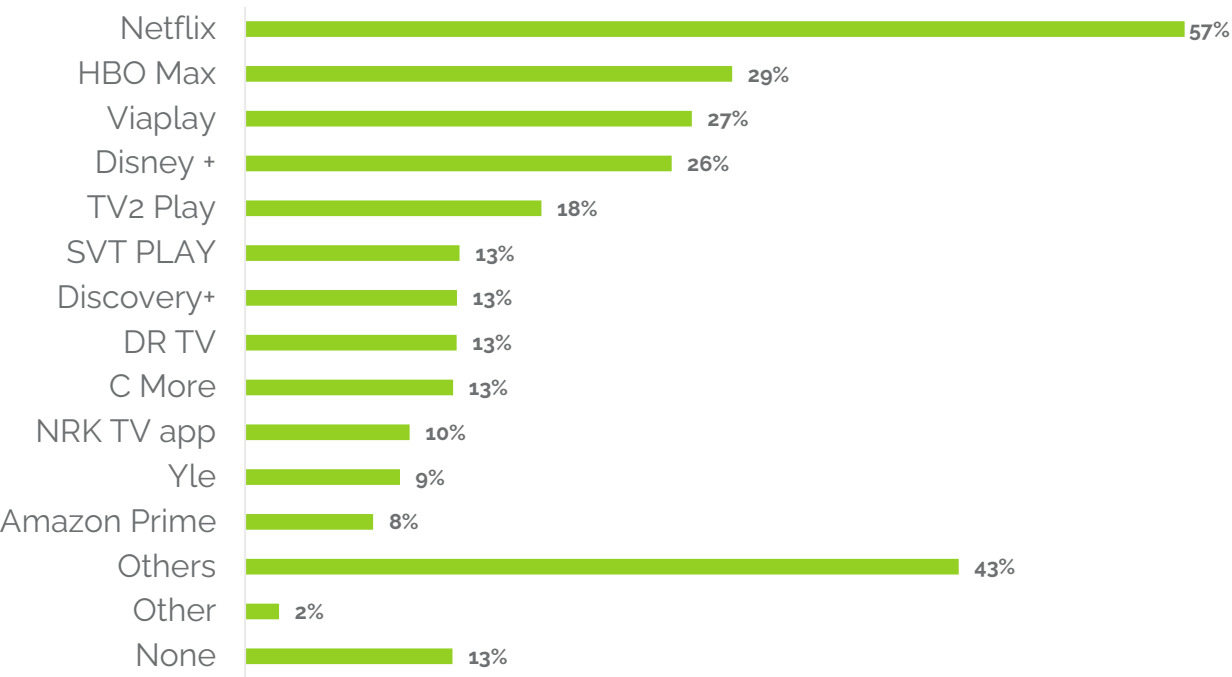
Q12b In a typical week, how many hours do you spend on watching TV/video content from the following services?
Base: Subscribers of the video streaming service

Streaming of TV/movie content – Nordic

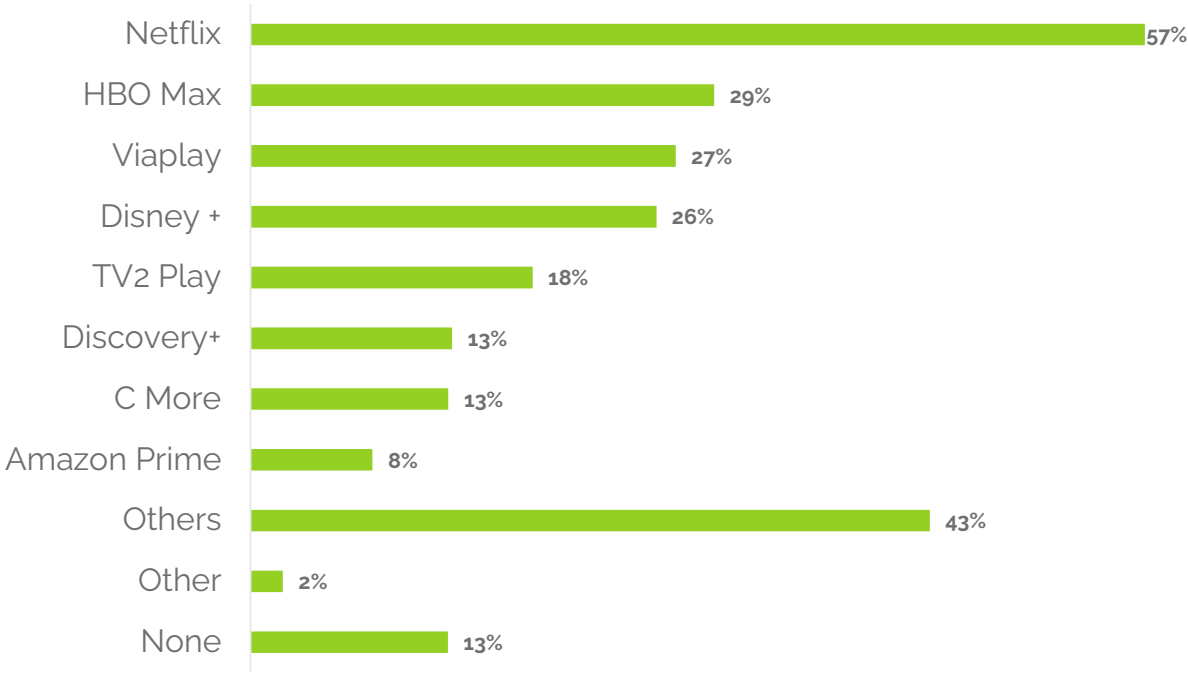
Across the Nordics, Netflix is the service most have subscribed for. HBO, Viaplay and Disney+ is almost on par



All service providers



Commercial service providers

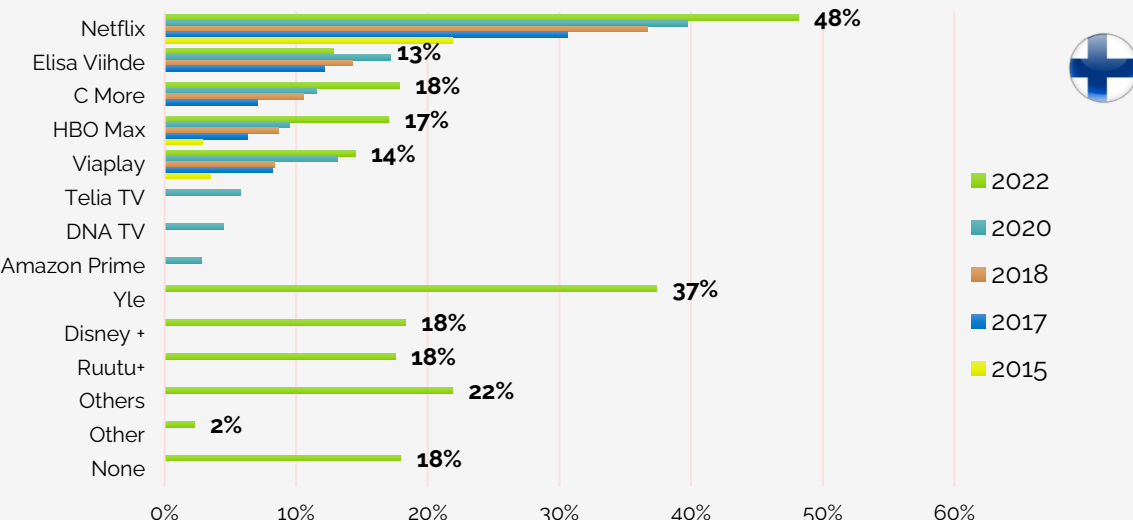
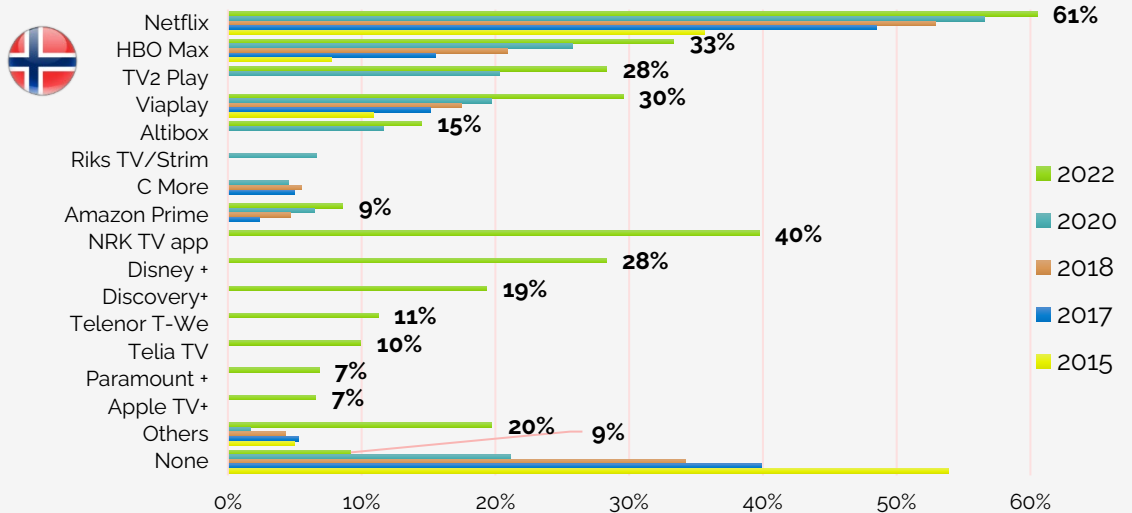
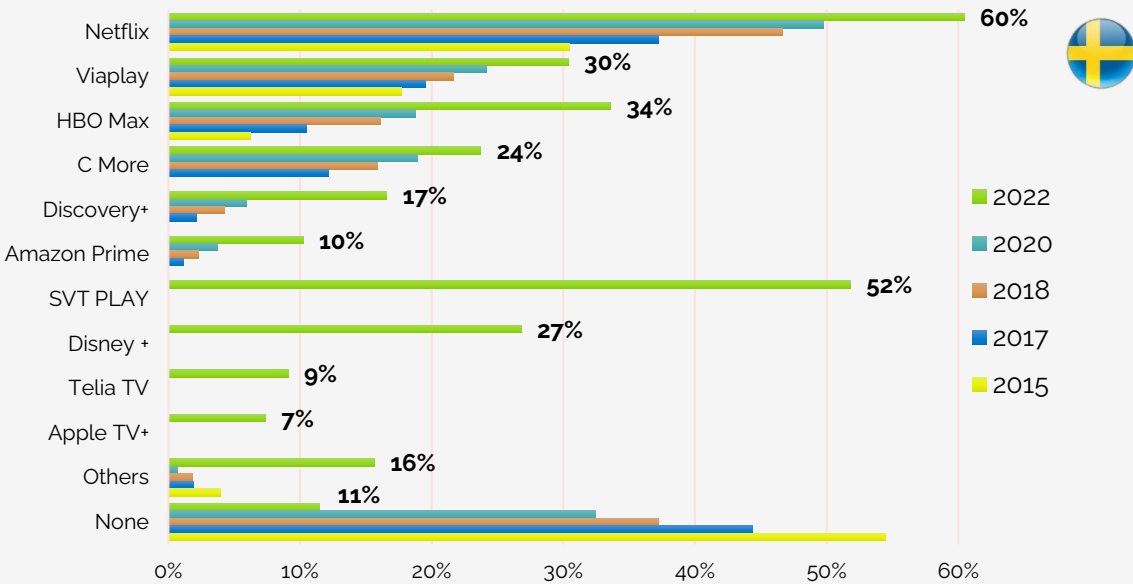
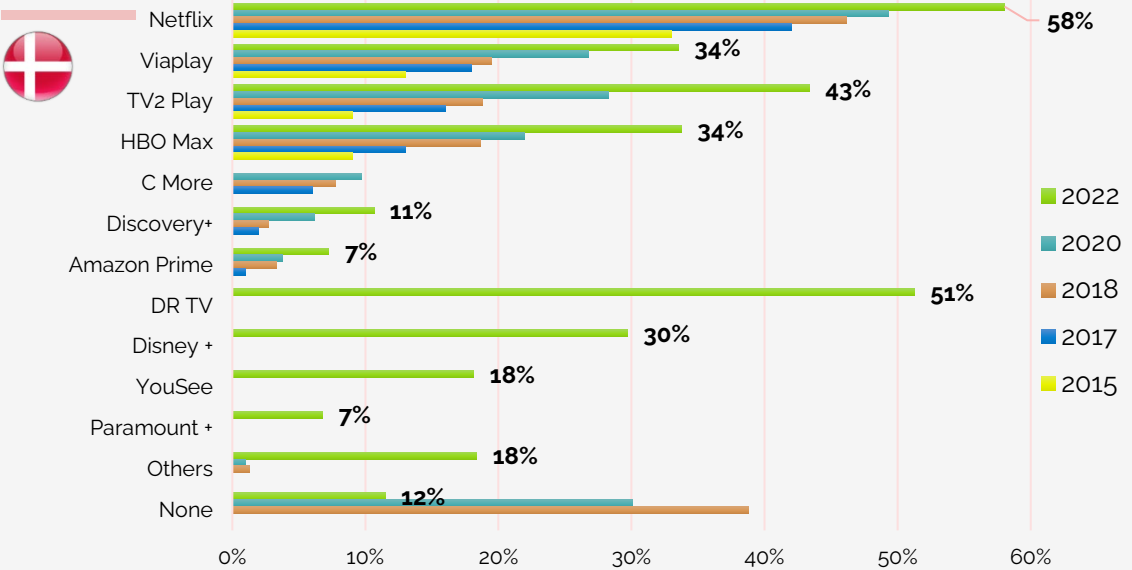


Q11 Do you currently subscribe to one or several of the following digital services providing TV and/or movie content?
Base: All

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

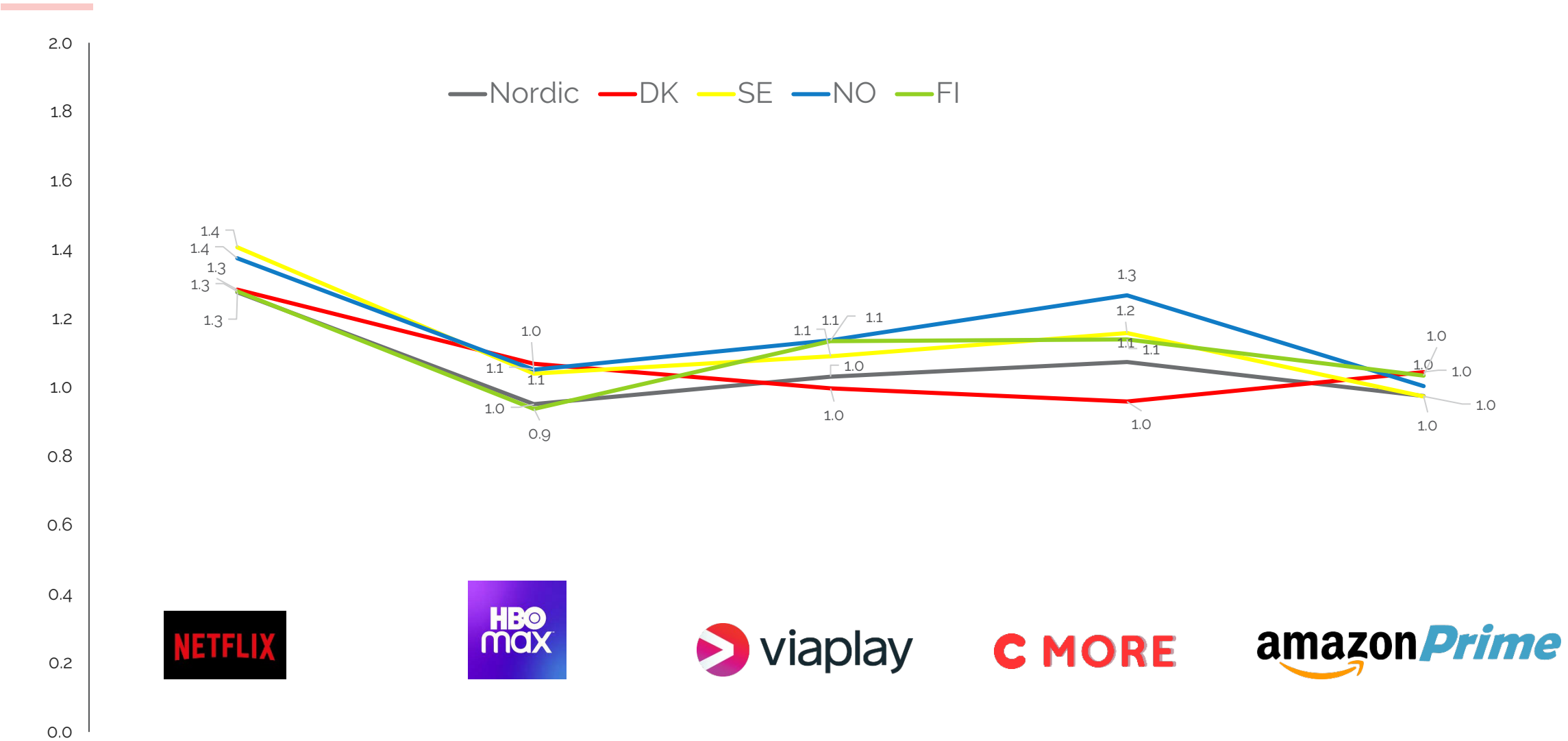
Streaming of TV/movie content – Nordic and countries

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.



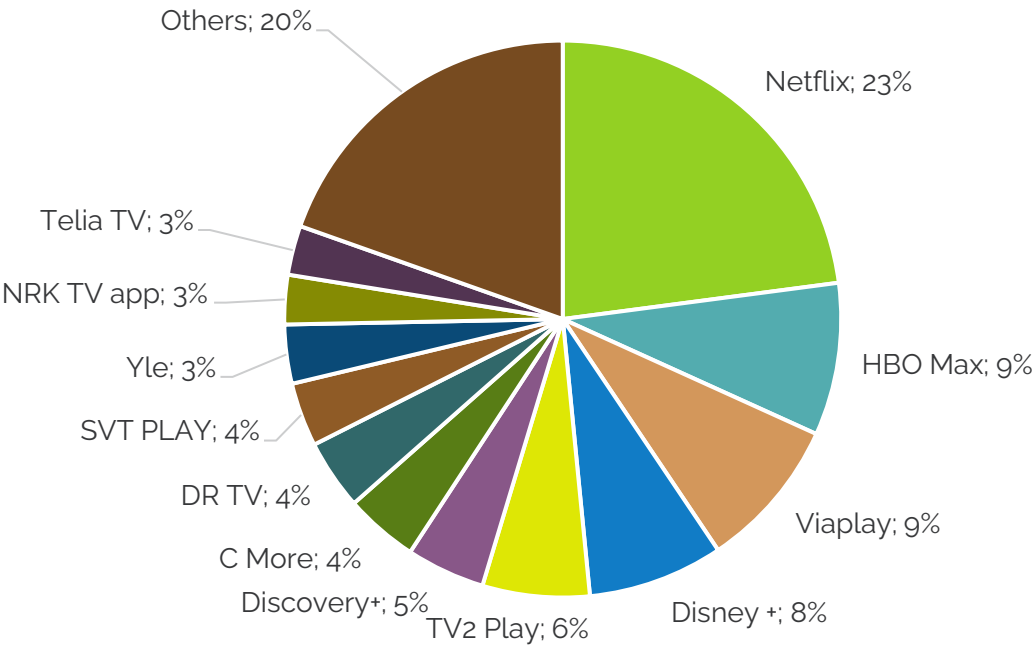
Q12b In a typical week, how many hours per day do you spend on watching TV/video content from the following services?
Base: Subscribers of the video streaming service

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

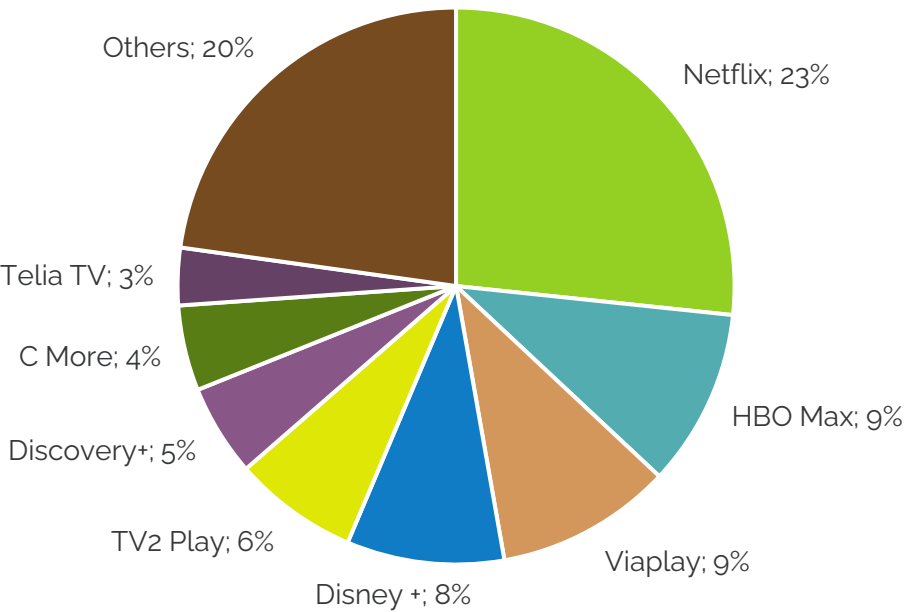
Across the Nordics, the trend in daily time spent on streaming TV/movie content is the same as from subscription: Netflix has by far the largest share and HBO, Viaplay and Disney+ is almost on par.

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

All service providers



Commercial service providers

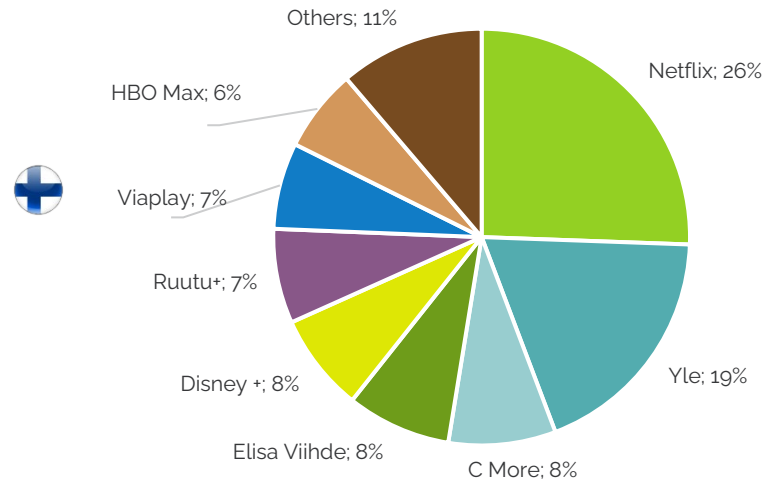
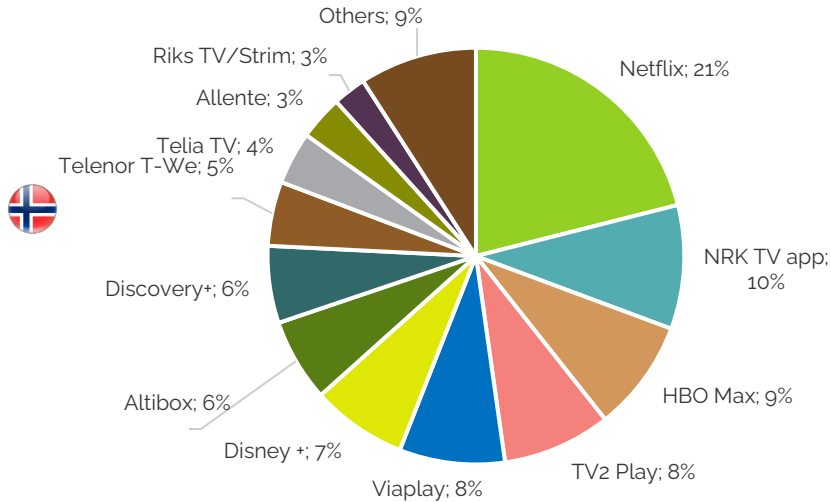
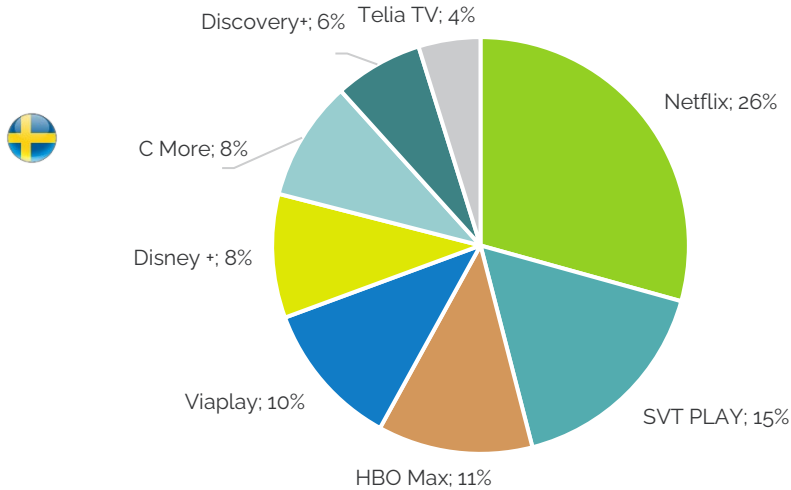
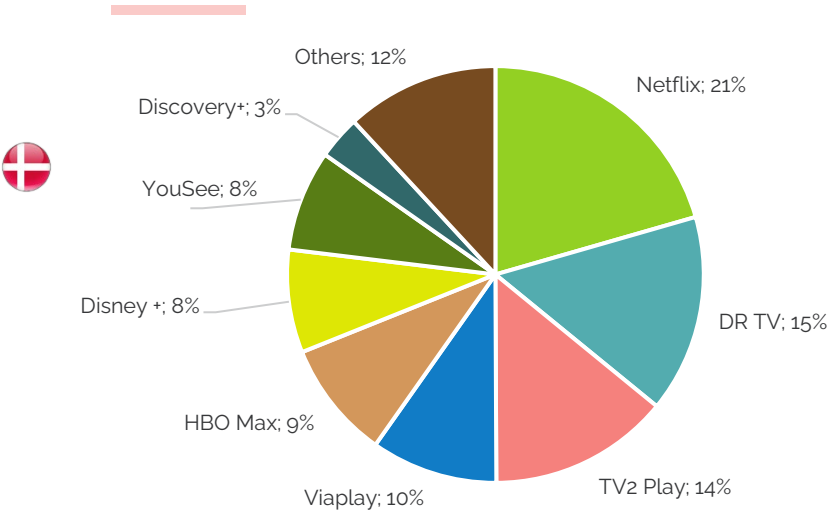


Q12b In a typical week, how many hours per day do you spend on watching TV/video content from the following services?
Base: Subscribers of the video streaming service

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"

A modern, bright interior space, likely a lounge or office area. The room features large, arched windows with white frames and a glass partition on the left. A light-colored sofa is positioned in the foreground, and a round table with chairs is visible on the right. The ceiling has a grid of small, dark lights. The overall atmosphere is clean and professional.

About YouGov



15 MILLION+

REGISTERED YUGOV PANEL MEMBERS
WORLDWIDE



50 MILLION

NUMBER OF SURVEYS COMPLETED GLOBALLY BY
YUGOV PANELLISTS
MAY 2020-21



#1

YUGOV IS THE MOST
QUOTED RESEARCH SOURCE
IN THE WORLD



1 MILLION+

UK DATA VARIABLES OF OPINIONS, ATTITUDES AND
BEHAVIOURS FROM OUR PANELLISTS



75%

RE-ENGAGE: PANELLISTS
RETURN FOR MULTIPLE
SURVEYS



2000+

CLIENTS SERVED IN 2020



55+

YUGOV OWNED
PANELS
WORLDWIDE



14

YEARS CONSISTENT
HISTORICAL DATA ON
BRANDS