



Polaris Nordic

Digital Music in the Nordics

January 2020

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YouGov[®]



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Background



Purpose of the 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.

The study has previously been conducted in 2015, 2017 and 2018. In 2020, the data from 2018 will be included to show the development of on-demand music streaming in the Nordics.

This report covers the following topics:

- The market for digital music services
- Behaviour and attitude on music streaming
- TV/movie streaming

Methodology



Sample

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



Methodology

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

2+2=

Interviews

DK: 1.024 interviews
SE: 1.015 interviews
NO: 1.016 interviews
FI: 1.024 interviews



Field Period

27 December 2019- 9 January 2020

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

- Across the Nordics, 9 in 10 stream music. The share of music streamers has increased since last year in Denmark, Norway, and Finland.
- The Nordic average of music streaming per day is 3.2 hours, while Norwegians listen the most with an average of 3.6 hours per day.
- Since last year, the share of premium subscribers has increased in Denmark (from 46% to 56%), Norway (from 50% to 55%), and Finland (from 26% to 32%) while Sweden maintains the same high level (from 51% to 52%).
- Finland is the country with the highest share of people who only stream music on free services such as YouTube and social media.
- Subscribers to paid music streaming services (49% of the population) tend to subscribe more to video streaming services than the general population in each country. In addition they are also more frequent concert-goers. (72% vs. 62%).
- YouTube is still the most used digital service for music streaming across the Nordics and has increased its share in all countries except Finland.
- Spotify is the second most used music streaming service. In all countries, paid versions are used more in total than free versions of Spotify. 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.

- Across the Nordics, the main reasons for not subscribing to a paid streaming service are that it is too expensive or because you have so many options for streaming music for free that it does not seem relevant to pay for a subscription-based music streaming service.
- In general, the interest in attending concerts has increased over the years. Across the Nordics, 62% of the total population have attended a concert, festival or other musical performance during the last year, and the active concert-goers on average attend 3.1 concerts a year.
- Pop & Rock are the most favoured genres across the Nordics.
- 50% listen to their own music library within music digital services. Finns and Norwegians especially use mood/vibe playlists.
- Across the Nordics, the usage of TV/ movie streaming services has increased in comparison to last year. Denmark and Norway are, with more than 70%, the two countries with the highest shares of people subscribing to at least one service TV/movie streaming service.
- Across all four Nordic countries, there are significant increases in the share of people who subscribe to Netflix, Viaplay, and HBO Nordic.

Results

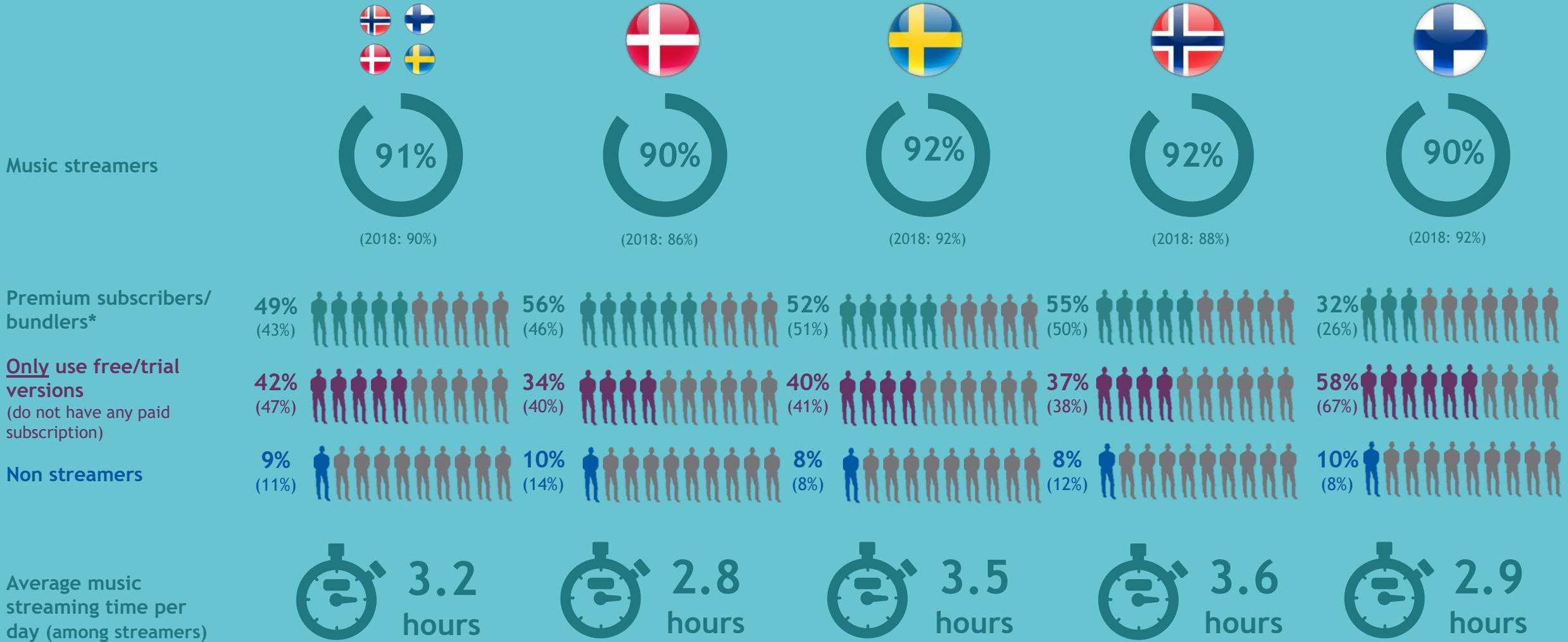




Streaming

Music consumption - Nordics and countries

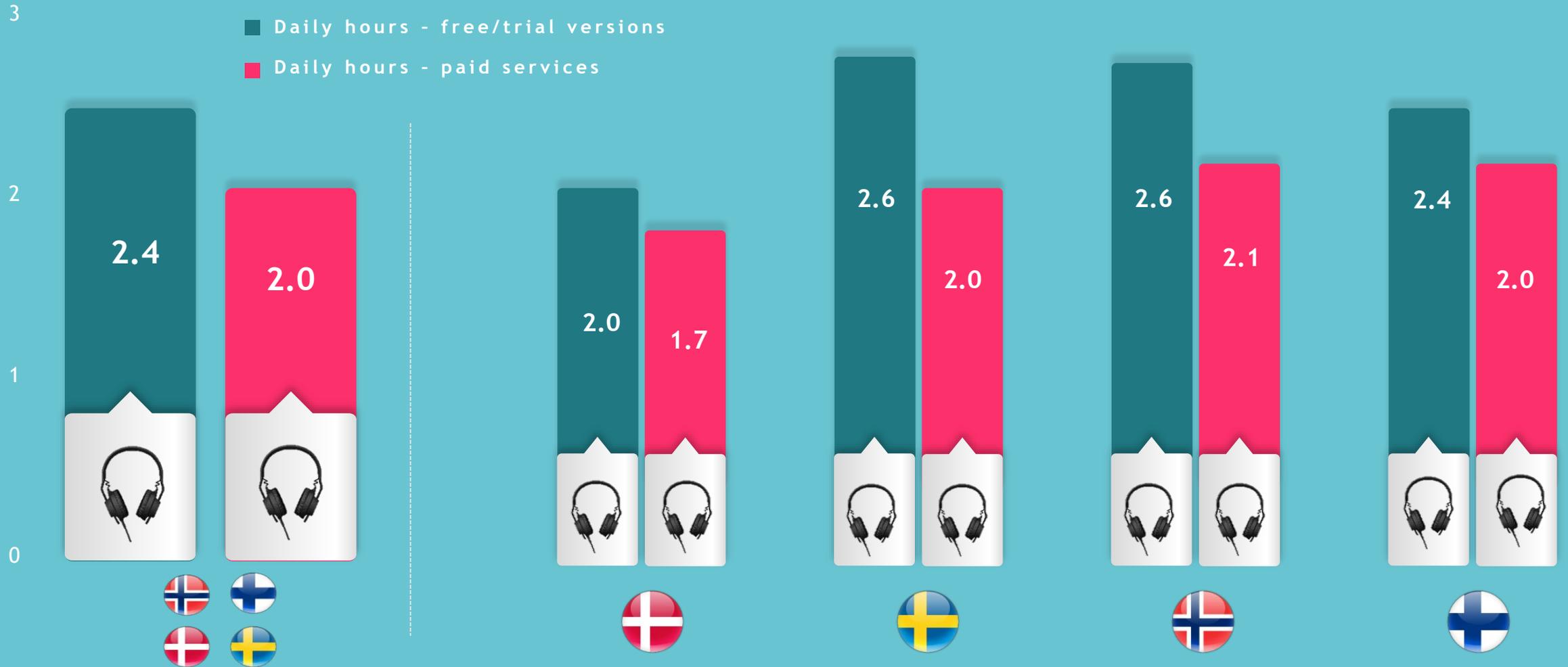
Across the Nordics, 9 in 10 stream music. More than half of the population in Sweden and Norway and half of the Danish population have a paid subscription to a music streaming service



This year, respondents were asked to estimate their **daily** time spent using different services, so the results are not directly proportional to previous years, when respondents were asked to estimate their **weekly** time spent. However the trend suggests that the time spent using different services has continued to increase.

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

On a daily basis, 0.4 more hours are spent on free streaming compared to paid versions measured per music listener. Danes spend less time on paid music streaming services compared to the other Nordic countries, whereas Norwegians spend the most time listening to paid music streaming services.



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Nordic profile of people with a **paid** audio streaming service (in comparison to the general population)

Premium
subscribers/bundlers

49%



49%



- ✓ No gender differences
- ✓ More 12-17 (15% vs. 11%) and 18-29 (26% vs. 20%) year olds and fewer 50-65 year olds (18% vs. 29%)
- ✓ Yearly household income of more than 700,000 DKK/SEK/NOK (EUR 94,000) (32% vs. 28%)
- ✓ Much more frequent concert-goers (72% vs. 62%)
- ✓ Favourite music genres are: Rap/Hip-Hop (26% vs. 20%), Alternative & Indie (16% vs. 12%), Urban/R&B (16% vs. 13%), Dance & Electronic (22% vs. 19%) and Pop (60% vs. 56%),
- ✓ Many more subscribers of TV/movie streaming services, especially Netflix (66% vs. 49%), HBO Nordic (28% vs. 19%) and Viaplay (29% vs. 21%)
- ✓ More who find it important to have access to all the music they like, when choosing a music service (63% vs. 46%)
- ✓ More who find it important that a music service is easy to use on multiple devices and platforms (38% vs. 25%)

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

(in comparison to the general population)

Only use free/trial versions

(do not have any paid subscription)

42%



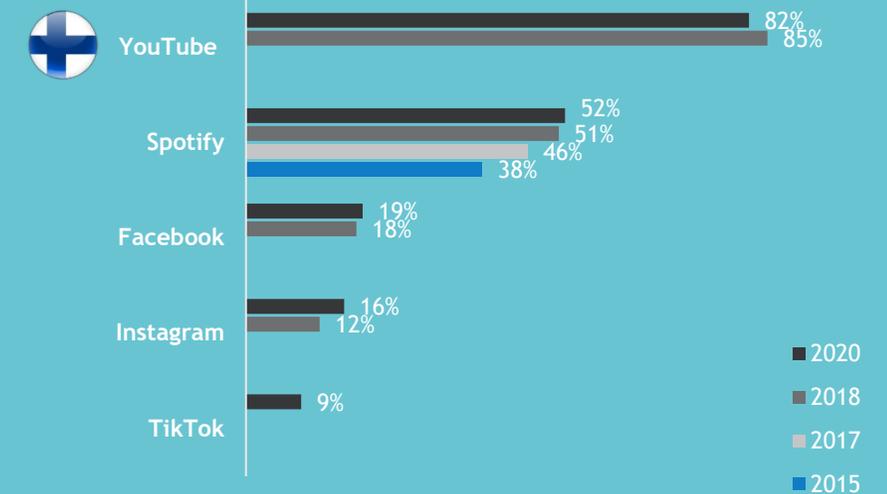
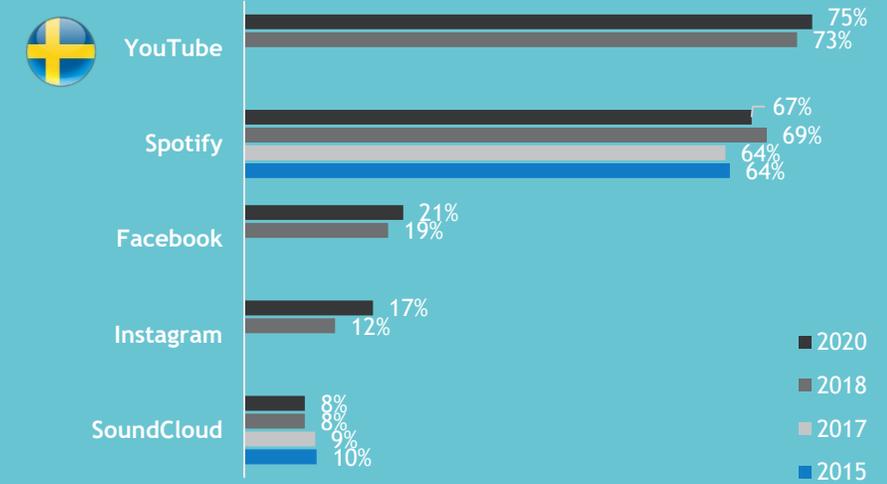
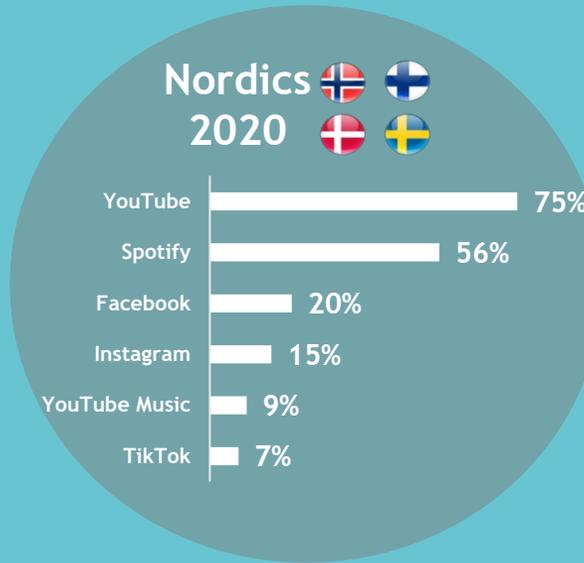
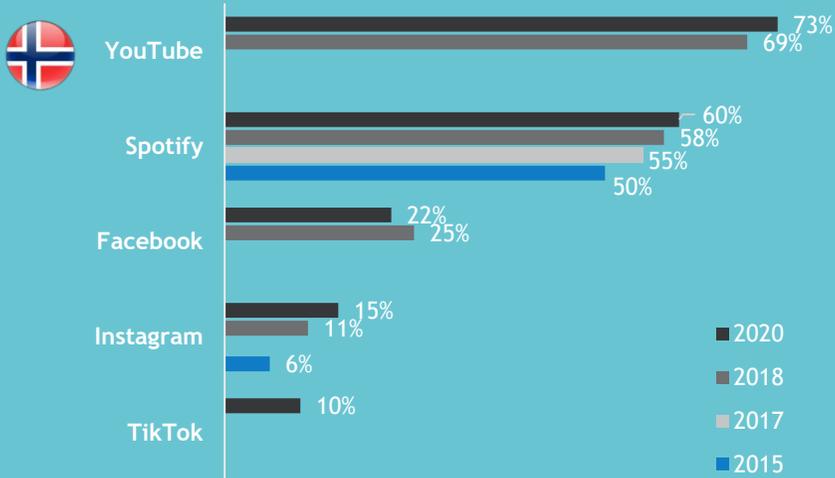
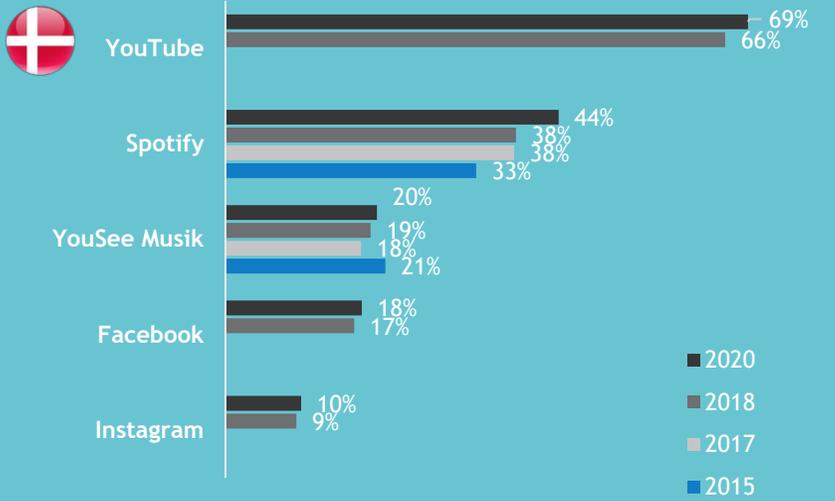
42%



- ✓ No gender differences
- ✓ More aged 50-65 (36% vs. 29%) and fewer aged 18-29 (15% vs. 20%)
- ✓ Less in the highest income group (22% vs. 28%)
- ✓ More Finns (35% vs. 25%) than Danes (21% vs. 25%), Norwegians (22% vs. 25%), and Swedes (23% vs. 25%)
- ✓ Less frequent concert-goers (42% vs. 36%)
- ✓ More strongly represented among people who favour the genres: Schlager/Traditional (19% vs. 15%), Country (18% vs. 16%) and Blues (16% vs. 14%)
- ✓ More have purchased CD's in the past 12 months compared to the population (17% vs. 14%)
- ✓ More on YouTube compared to the general population: More listen to/watch music videos on YouTube (86% vs. 75%), more discover new favourite songs on YouTube (19% vs. 13%)
- ✓ More also discover new favourite songs on the radio (40% vs. 36%)
- ✓ Use free/trial (Spotify with ads) much more than others (87% vs. 34%)
- ✓ When choosing a music service for listening to music, many more find it important that the music service is free (48% vs. 29%)
- ✓ Fewer have a paid subscription to video streaming services, Netflix (35% vs. 49%), HBO Nordic (11% vs. 19%), and Viaplay (14% vs. 21%) especially

Top audio and video services used for streaming of music - Nordics and countries

Across all four Nordic countries, YouTube is the most used digital music service for music. Spotify comes in second. Both Facebook and Instagram are in the top 5 in most countries

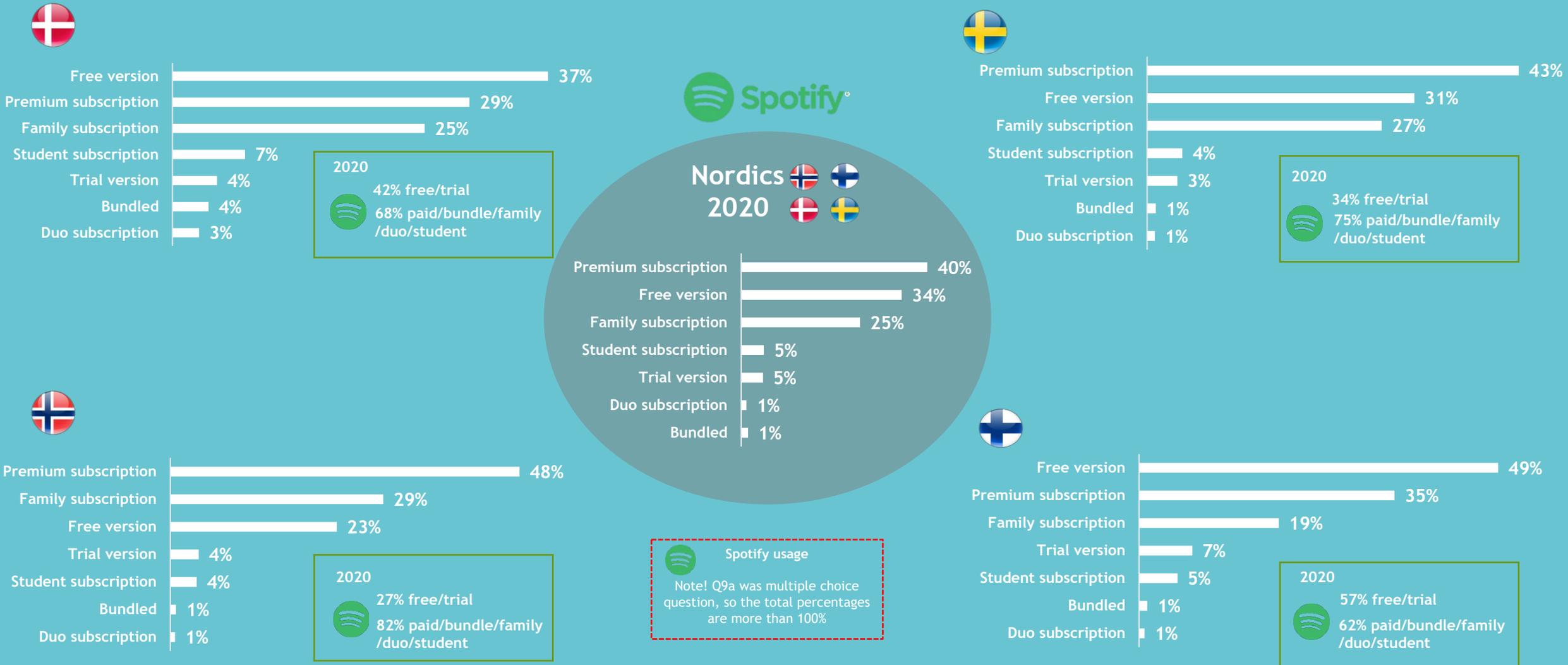


Q7a Which of the following digital music services do you use when listening to music?
Base: All

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 - Nordics and countries

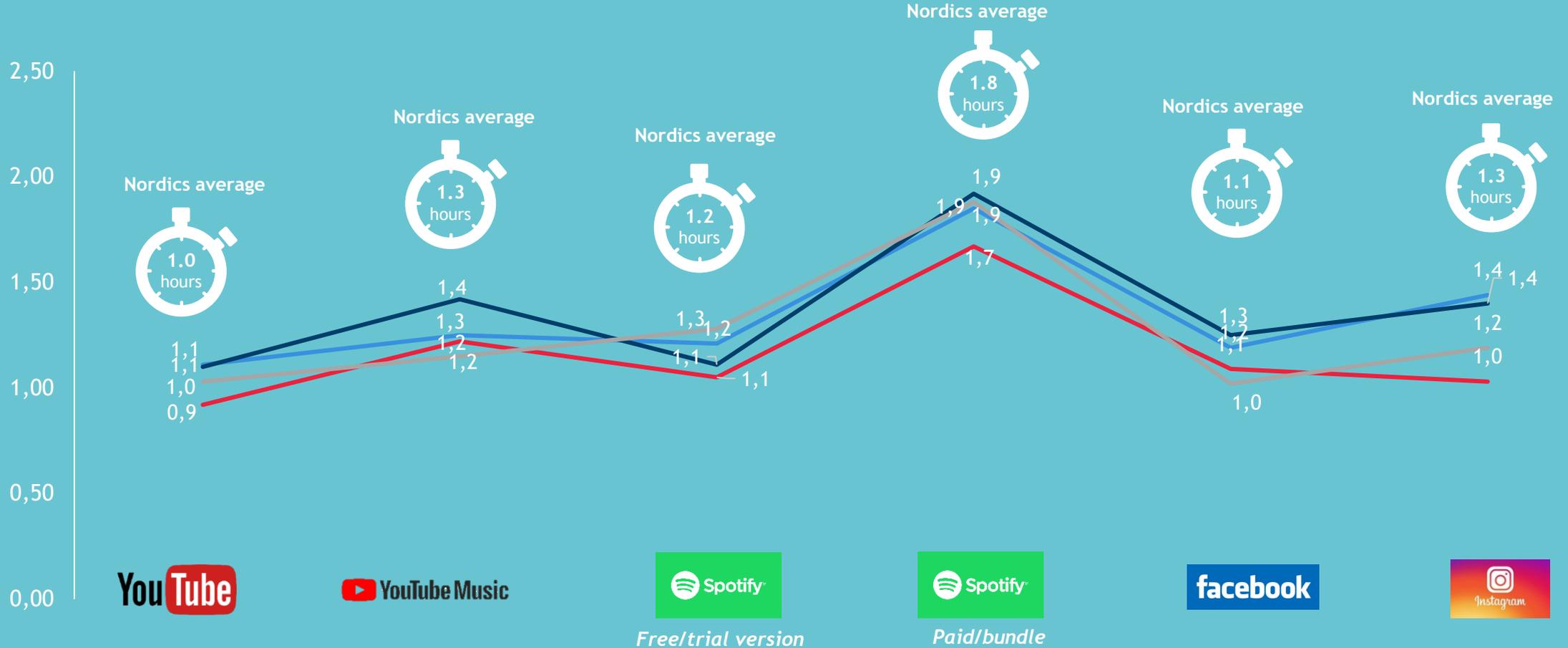
In all countries, paid versions are used more in total than free versions of Spotify. The Premium version is the single most used version in Denmark, Sweden and Norway, whereas the Free version is the single most used version in Finland



Q9a Which version of Spotify have you used within the last 12 months?
Base: Users of Spotify

Daily time spent on the top 5 audio and video services used for streaming of music - Nordics and countries

Out of the top 5 digital services used for streaming, the most time is spent on paid/bundle Spotify subscriptions. In general, Swedes and Norwegians have a longer time consumption on all services shown below



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

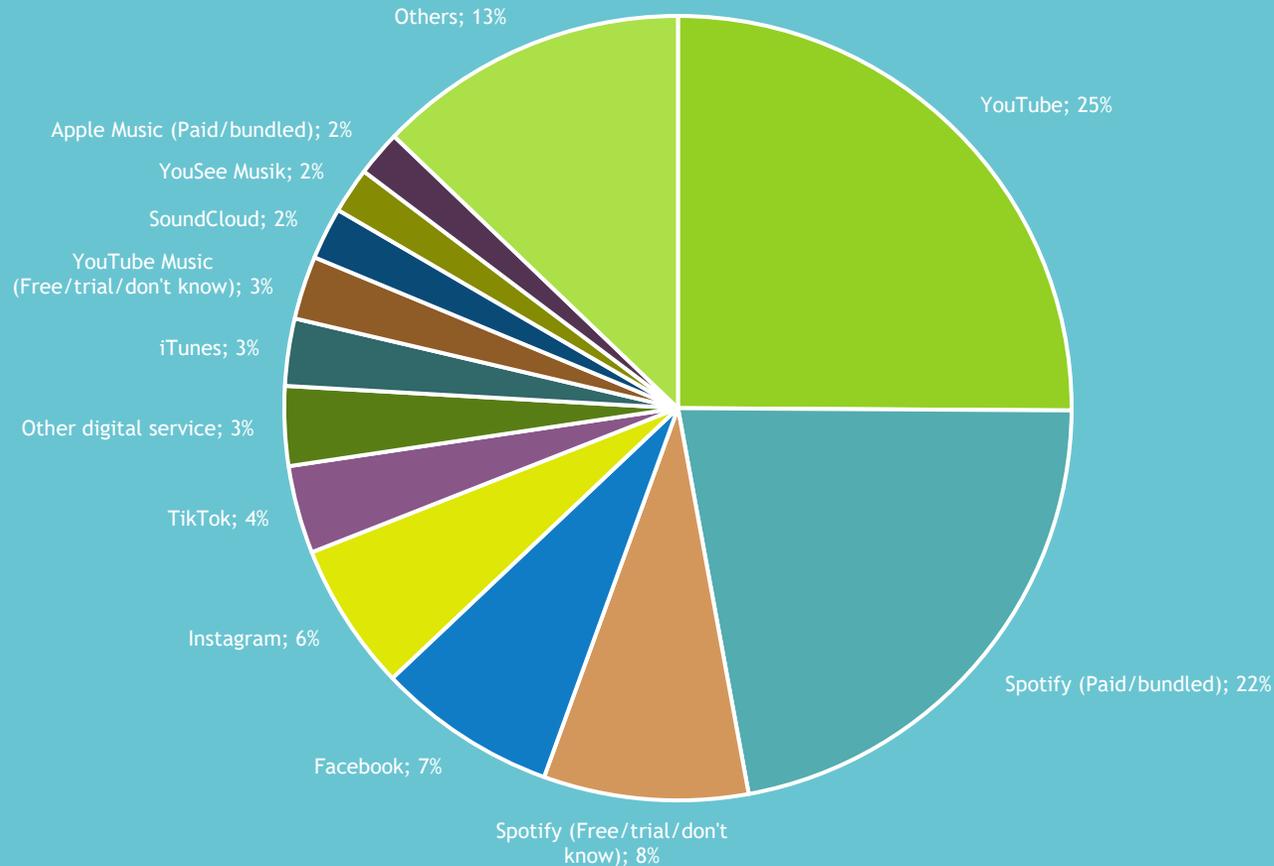


This year, respondents were asked to estimate their **daily** time spent using different services, so the results are not directly proportional to previous years, when respondents were asked to estimate their **weekly** time spent. However the trend suggests that the time spent using different services has continued to increase.

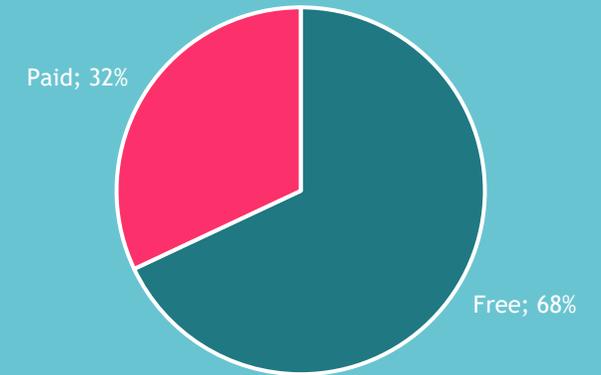
Daily time spent on the audio and video services used for streaming of music - Nordic overview

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

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:

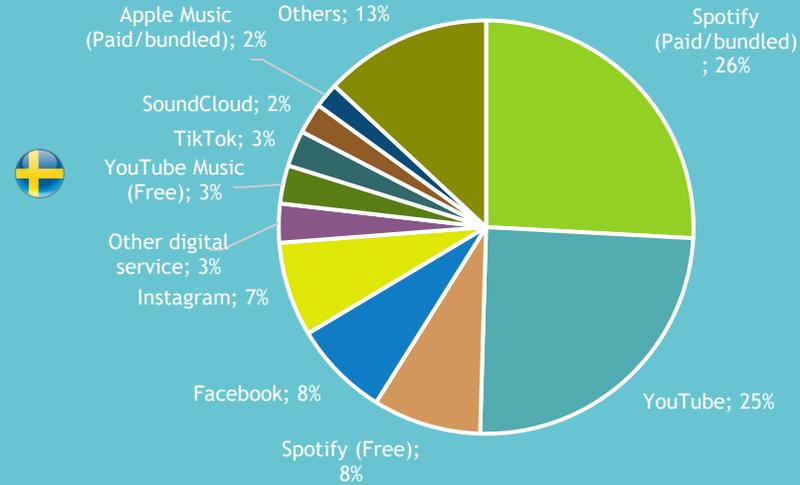
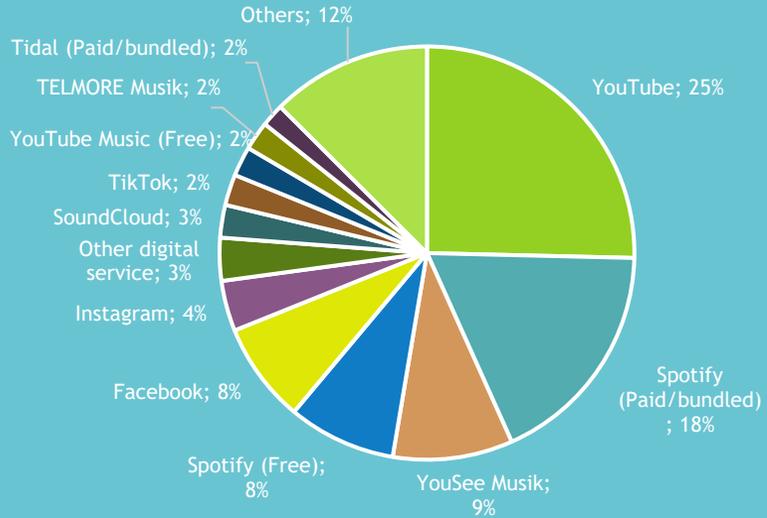


Q8a In a typical week, how many hours per day do you spend listening to music or watching music videos on the following digital services?
Base: Use digital service to listen to music

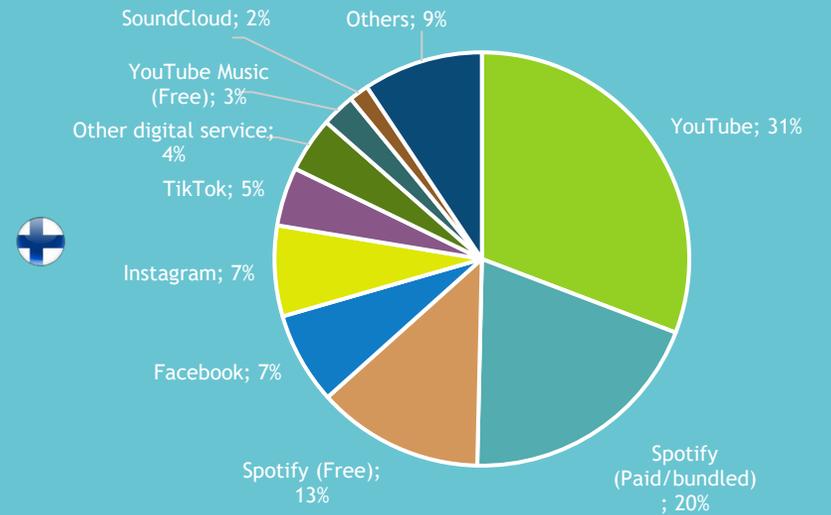
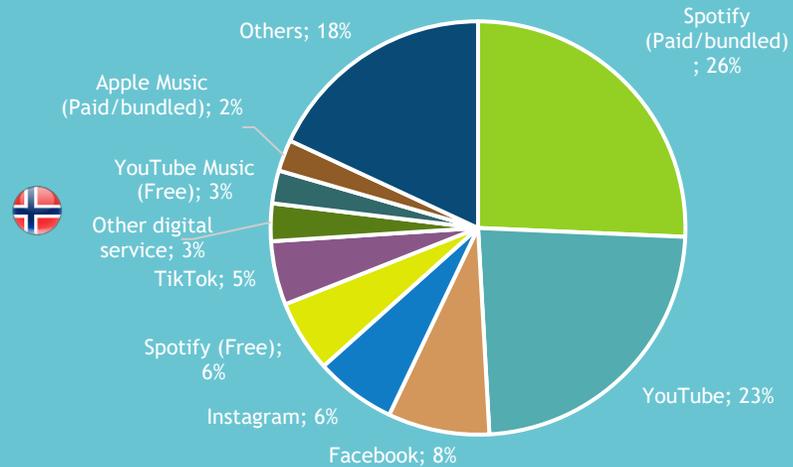
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Daily time spent on the audio and video services used for streaming of music - Nordic overview

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

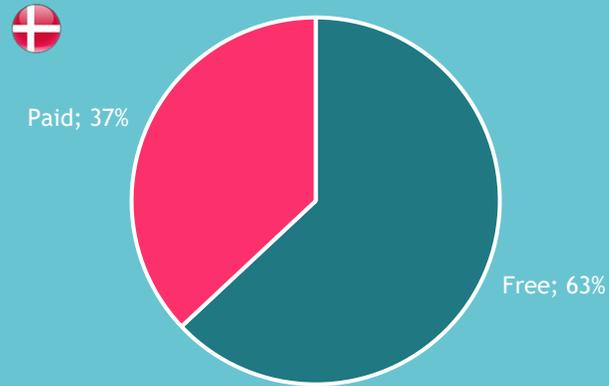


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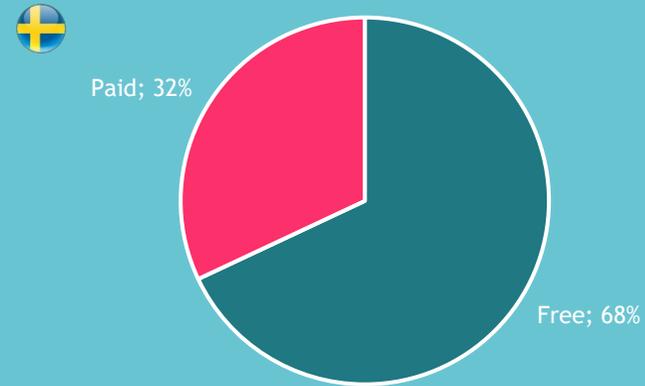


Daily time spent on the paid and free audio and video services used for streaming of music - Nordic overview
Across the Nordics, two-third of all time spent comes from free music streaming.

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

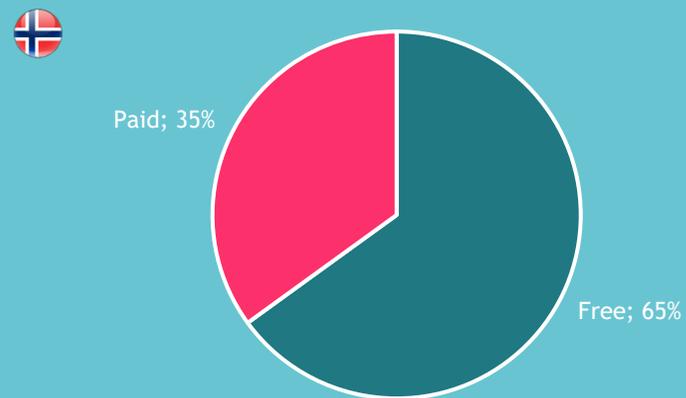


Share of time used on paid vs. free music streaming:

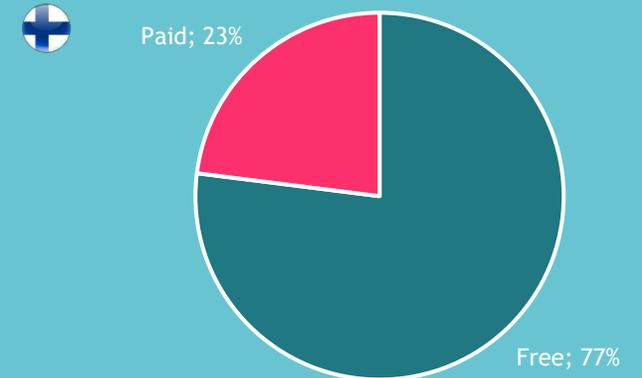


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Share of time used on paid vs. free music streaming:

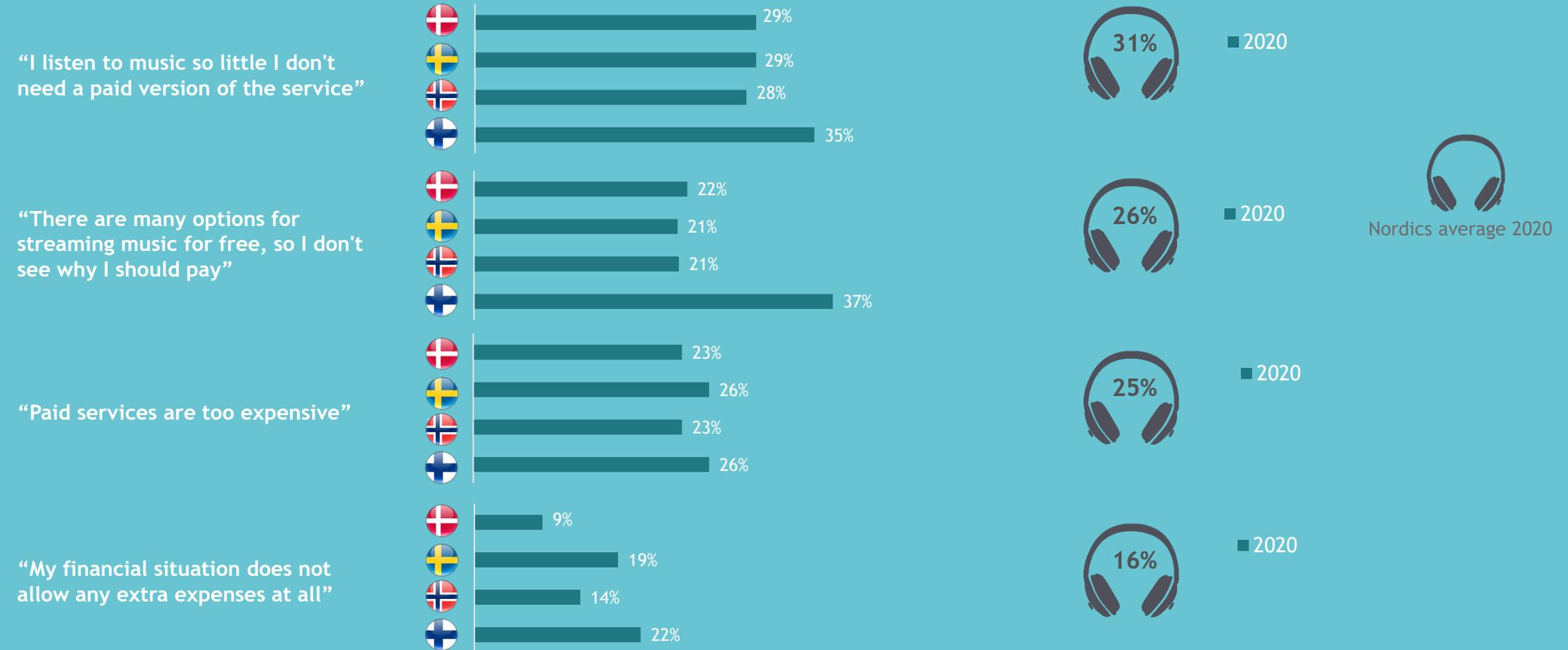


Share of time used on paid vs. free music streaming:



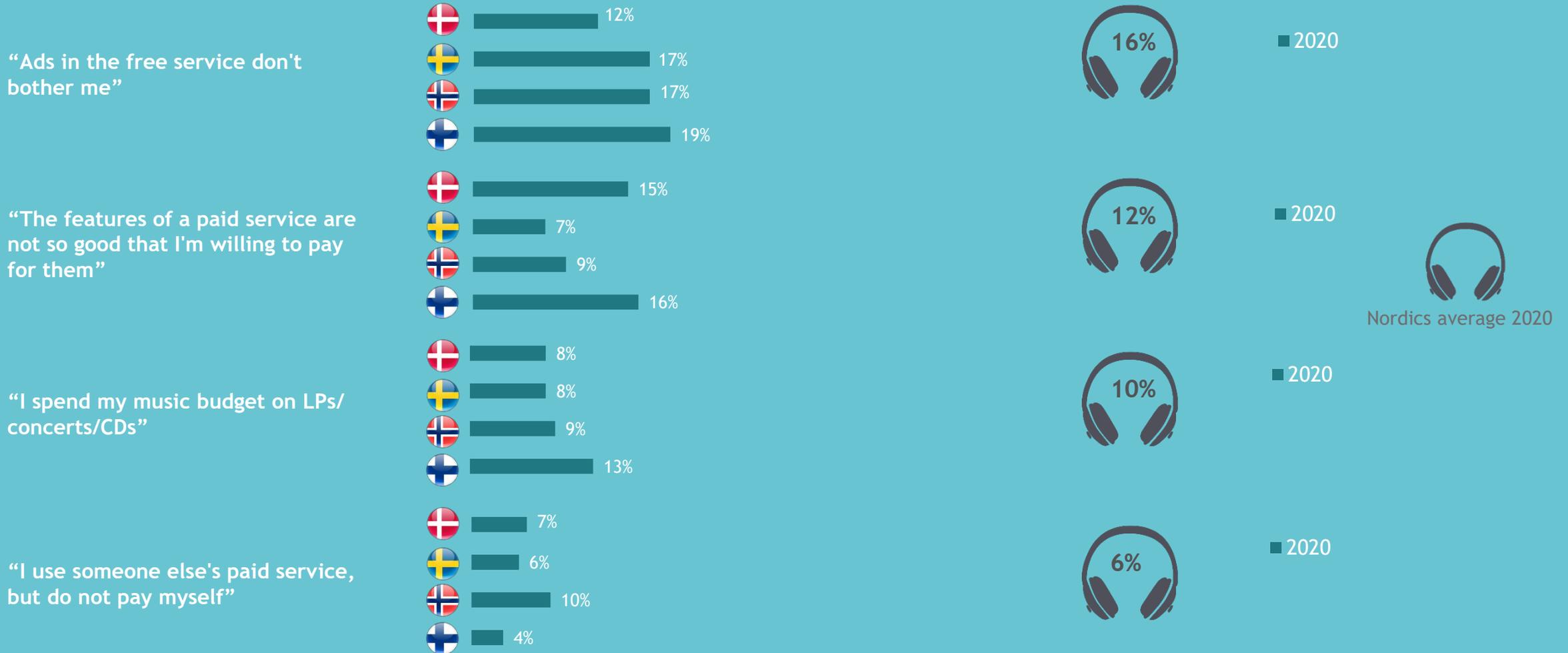
Reasons for not subscribing to a music streaming service - Nordics and countries

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



Reasons for not subscribing to a music streaming service - Nordics and countries

Not being bothered by ads is not a main reason for not subscribing to a music streaming service with as few as 16% stating that they are not bothered by ads in the free services. Using someone else's paid service or spending one's music budget on music items like CDs and LP's are not main reasons either

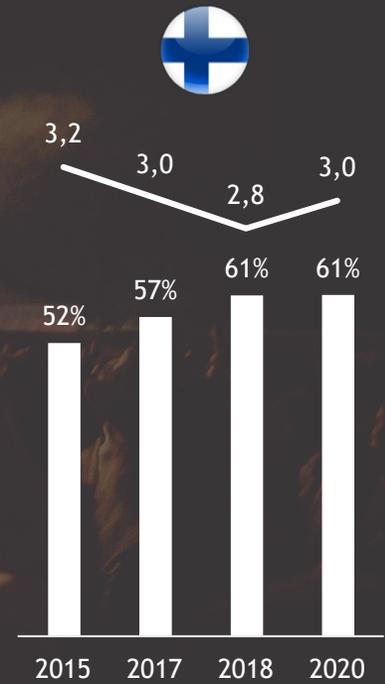
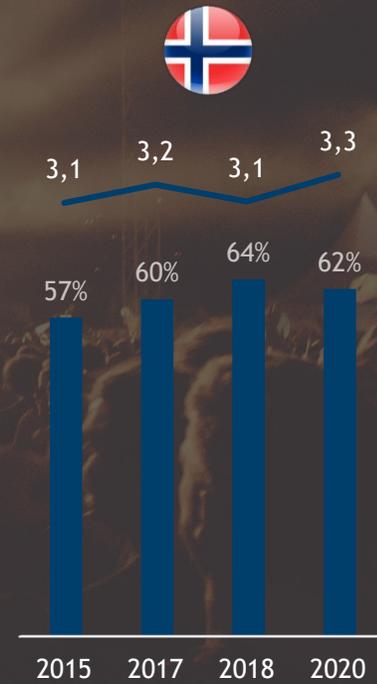
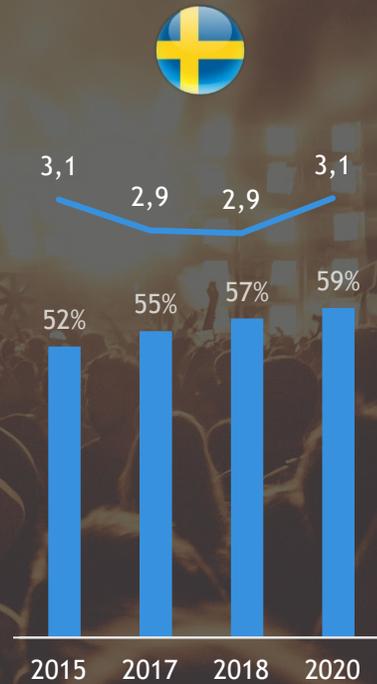
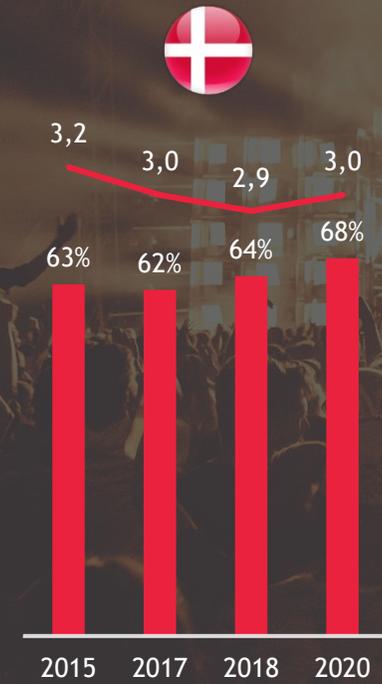
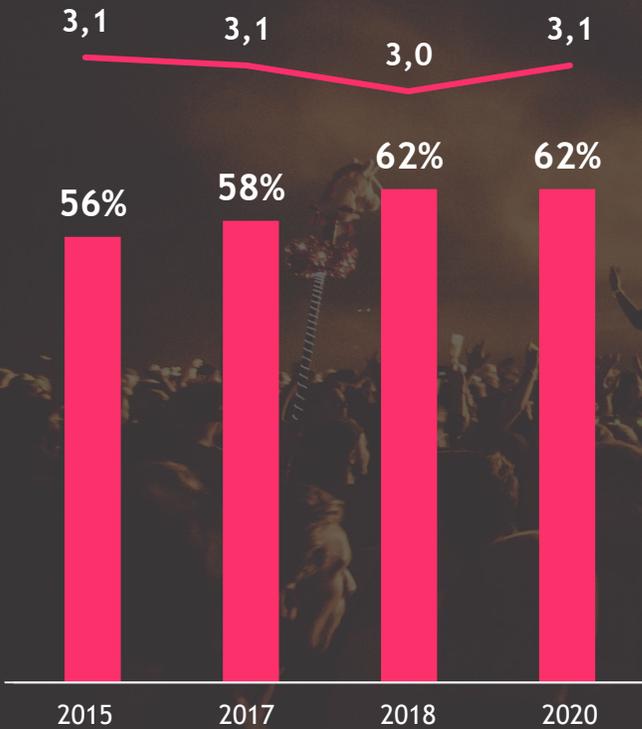




Behaviour

Concerts - Nordics and countries

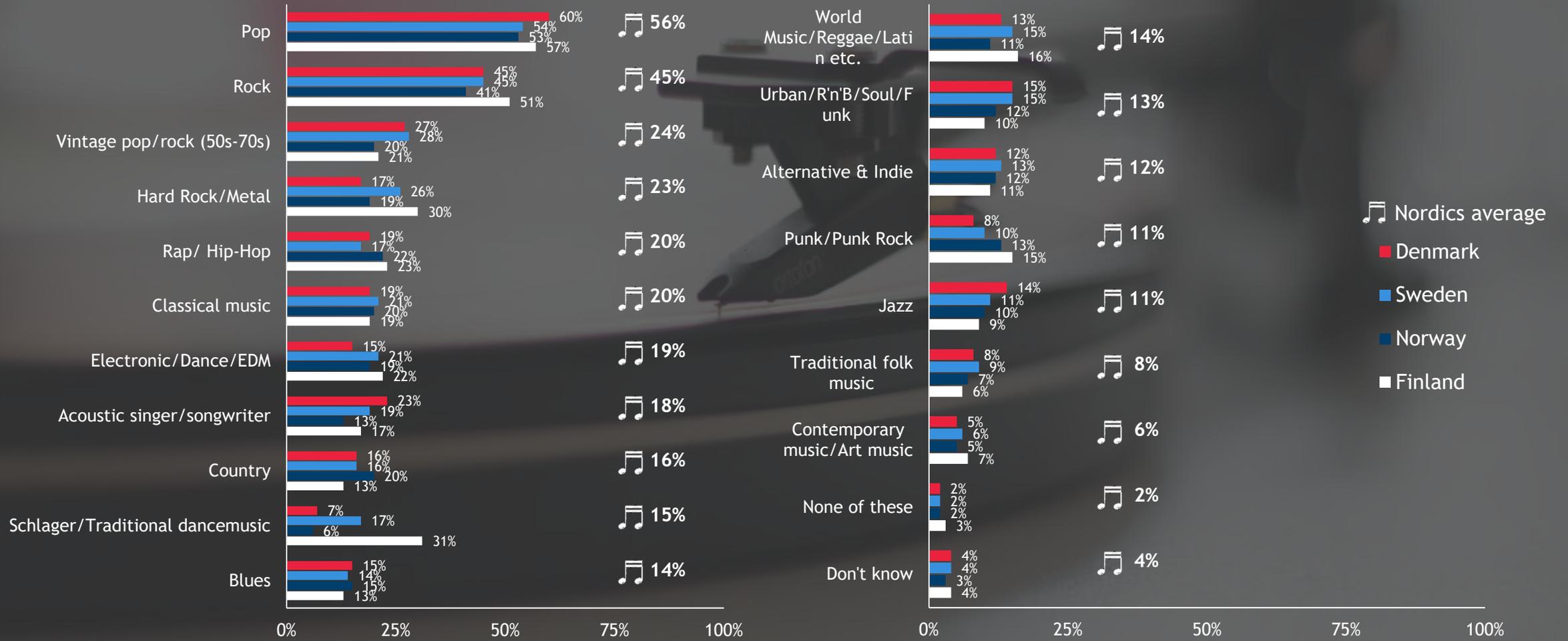
In the Nordics, 2 in 3 annually attend a concert. Those who go to concerts attend on average 3 concerts a year



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

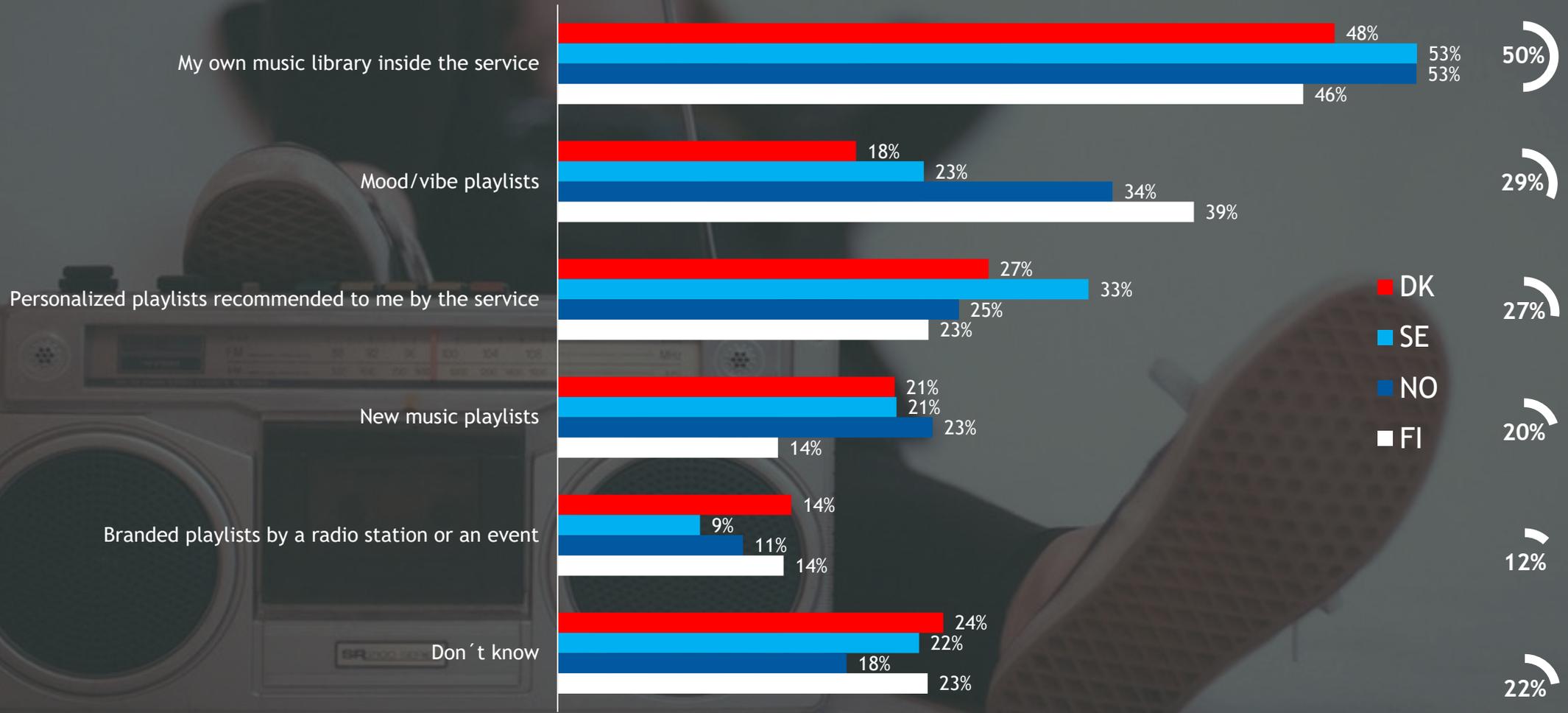
Q4 How many concerts, festivals or other live music events have you been to during the past 12 months? (Average)
Base: Have been to a concert in the past 12 months

Pop & Rock are the most favoured genres across the Nordics



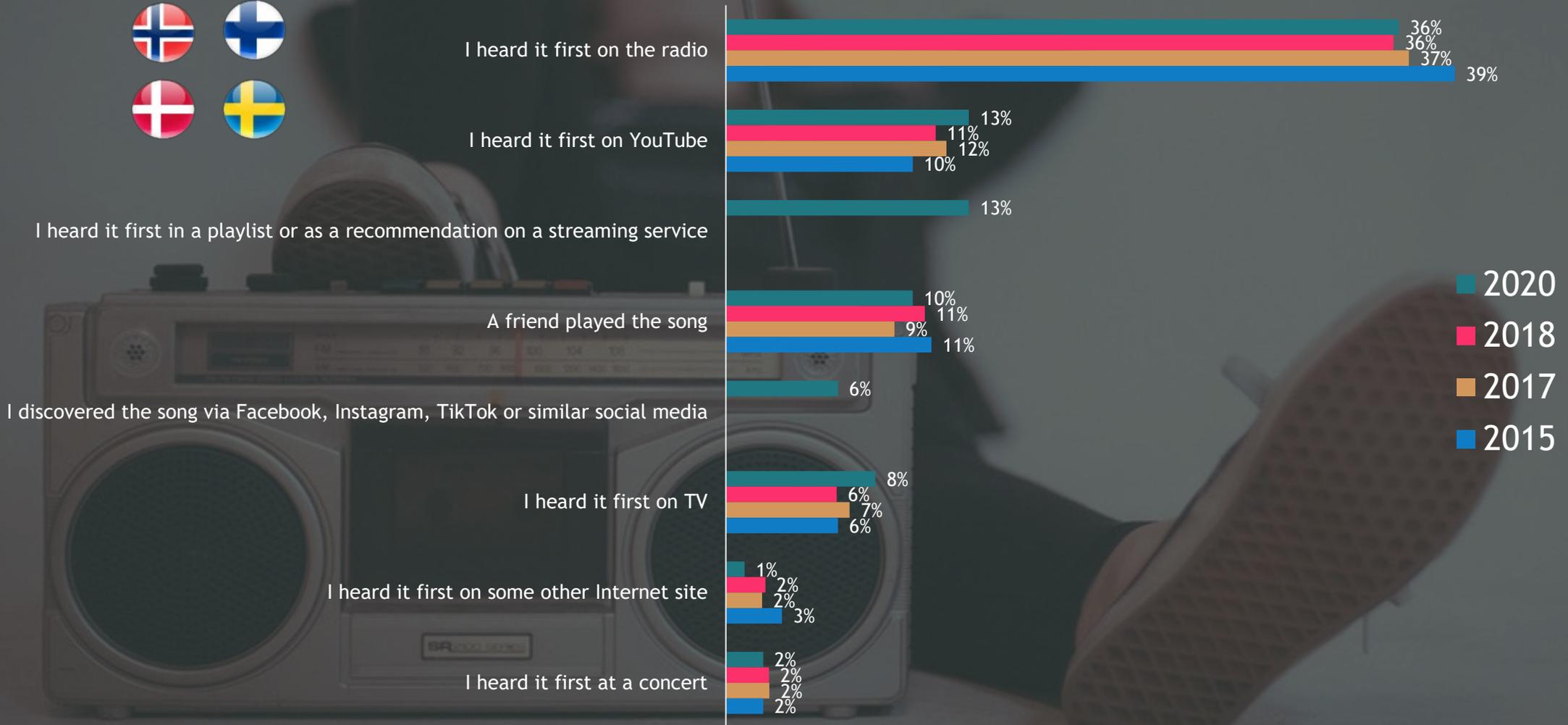
Types of playlists listened to on digital services used - Nordics and countries

In the Nordics, 50% listen to their own music library inside music digital services, Finns and Norwegians especially use mood/vibe playlists



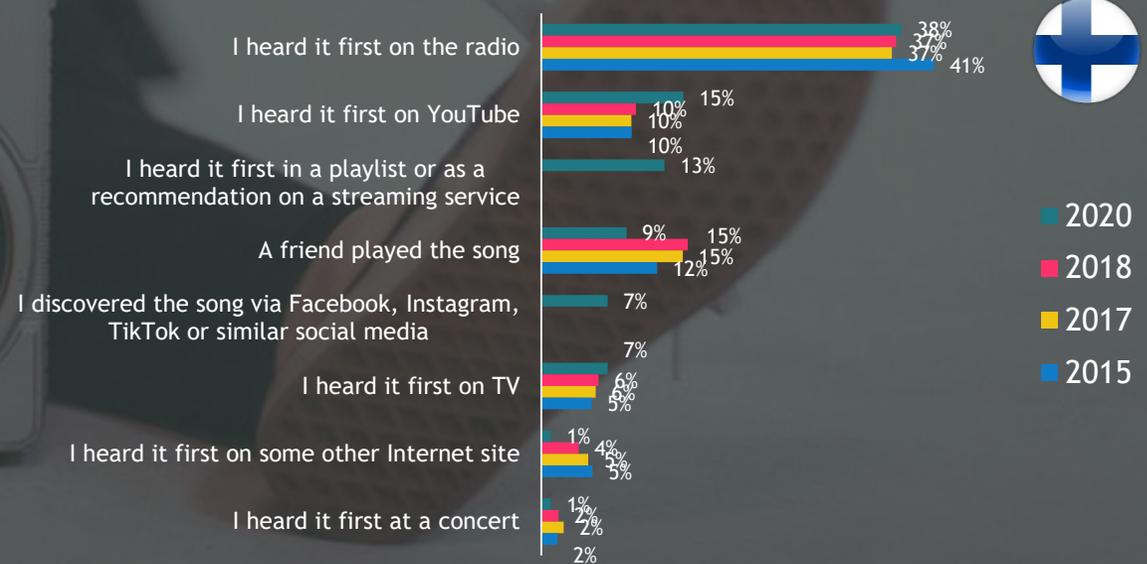
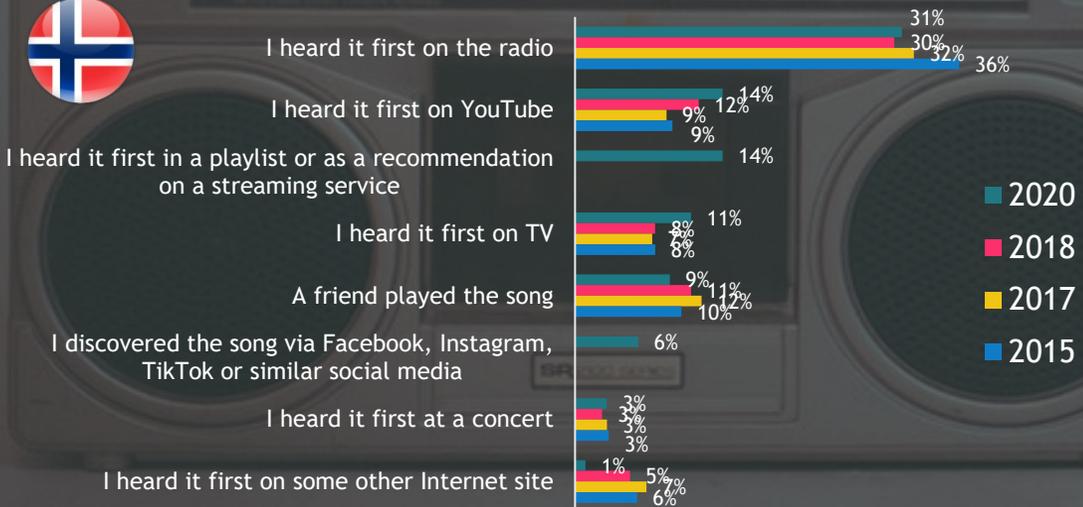
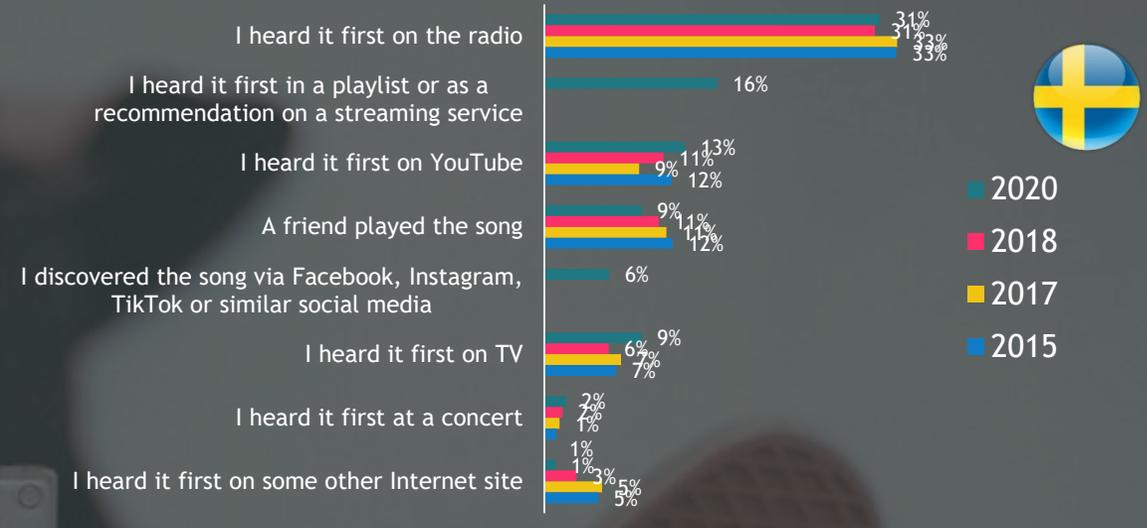
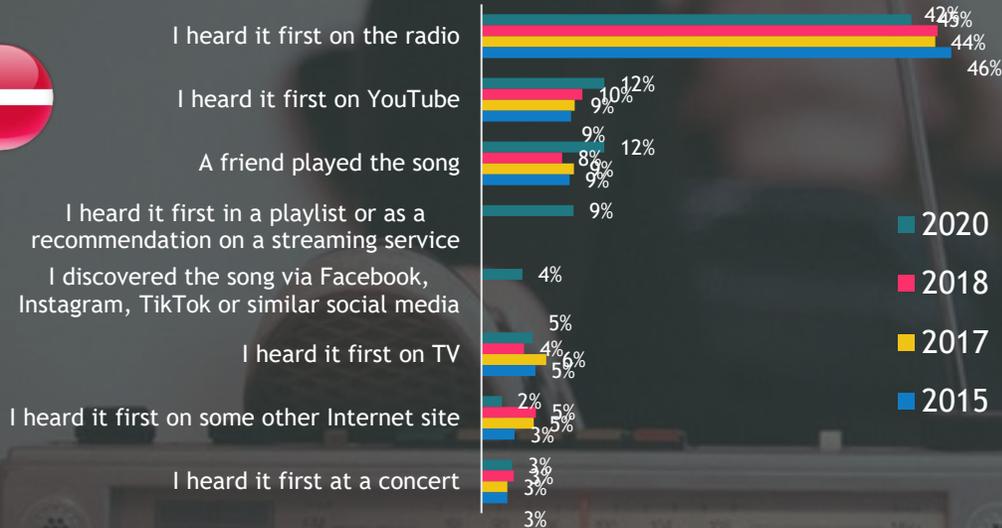
Channels where a new song was discovered - Nordics

Radio is still the main channel for discovering new songs



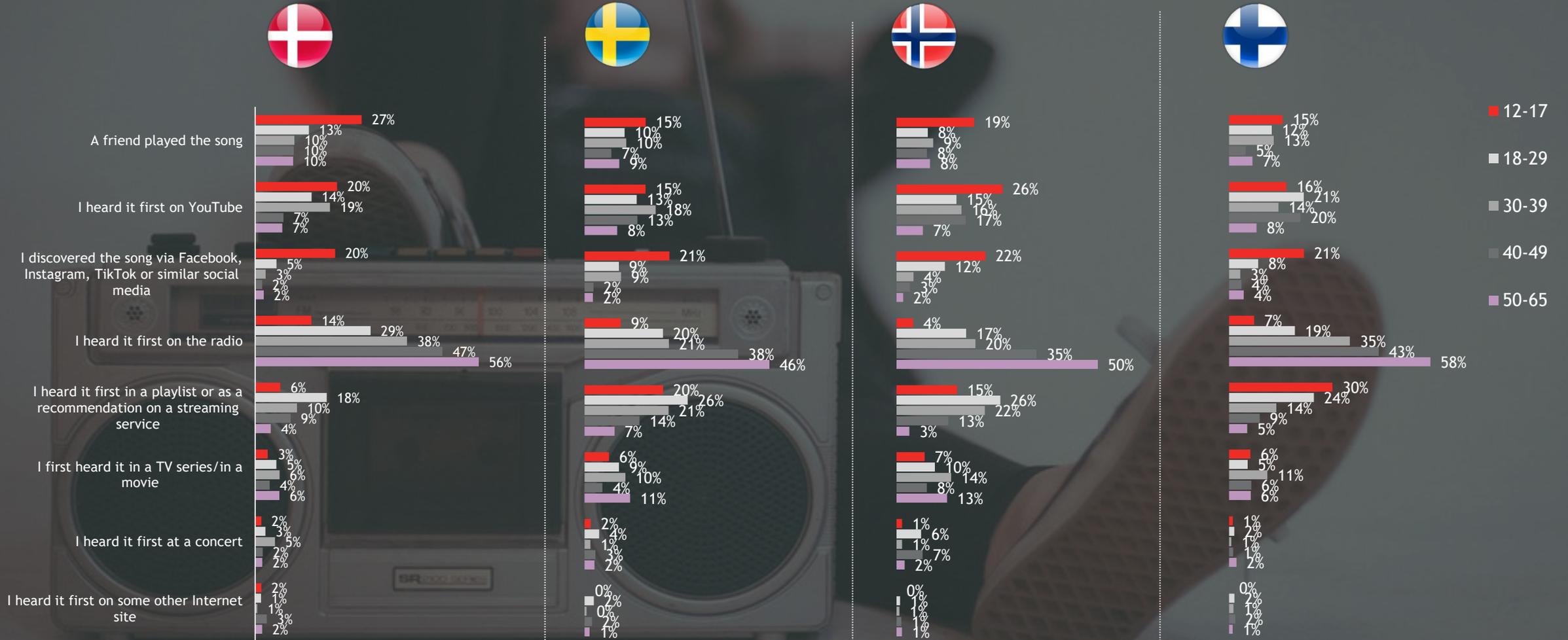
Q21 Think back to the last time you discovered a new song/piece of music you really liked: How did you discover it?
Base: All

Radio is still the main channel for discovering new songs



Channels where a new song was discovered - by age

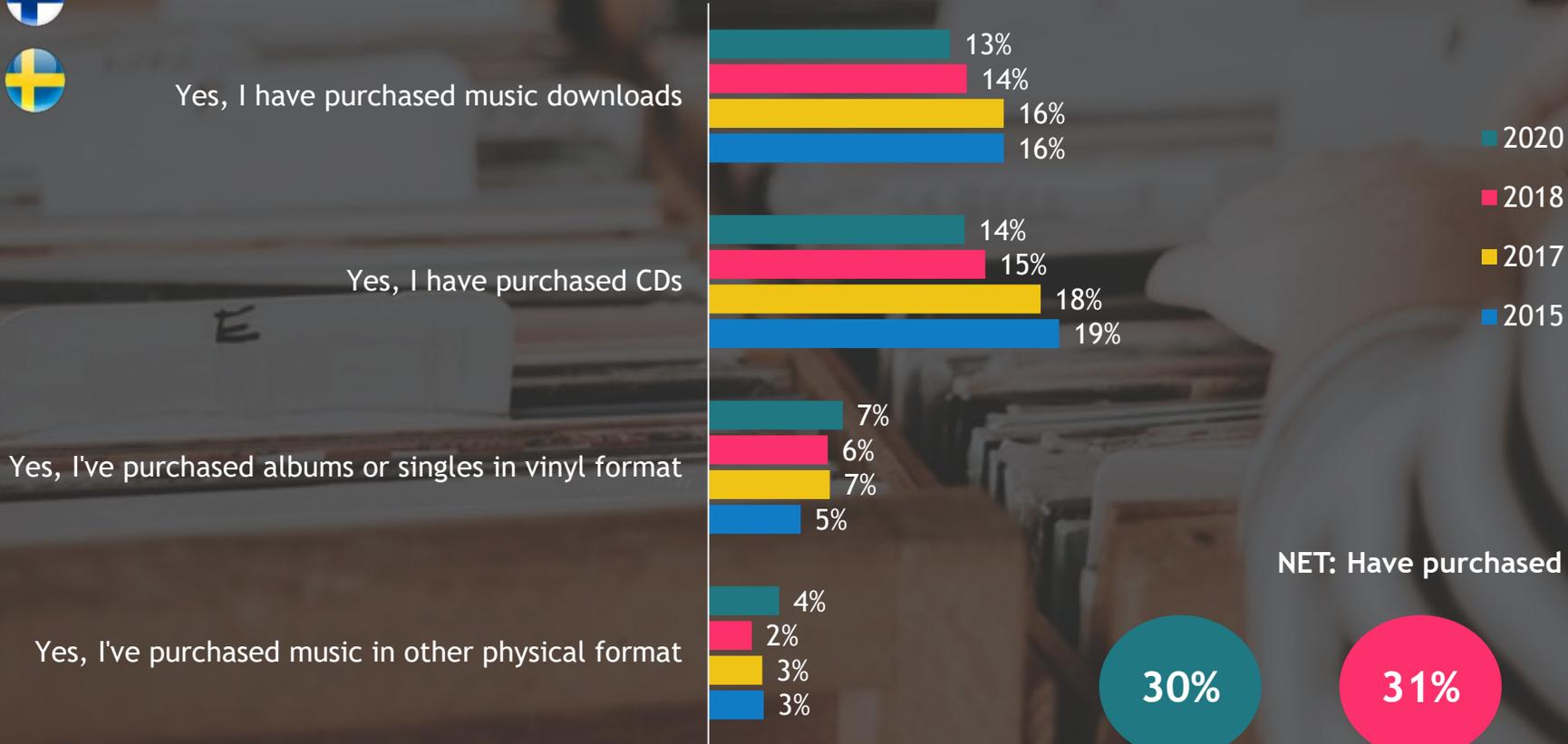
Radio is primarily used to discover new music by people over 30 years old. Young people primarily discover new music through friends and social media



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

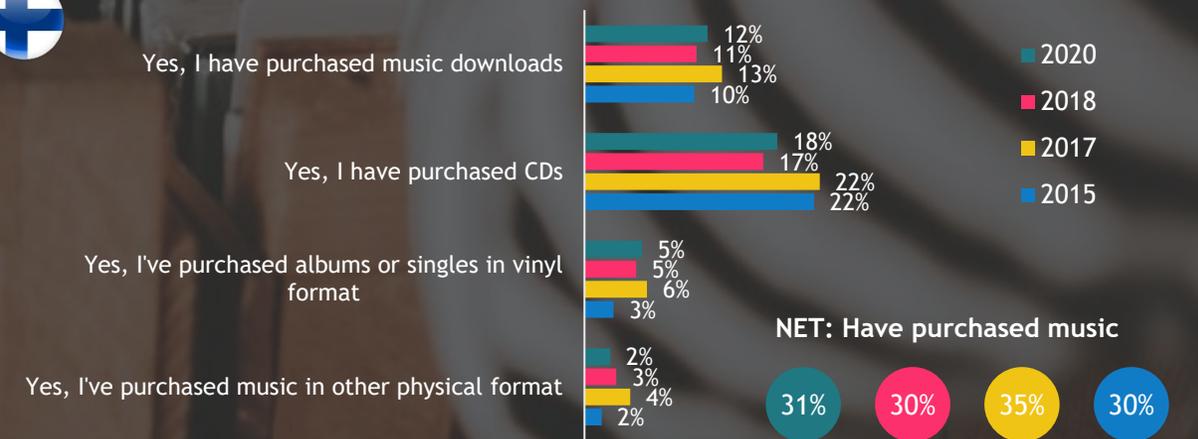
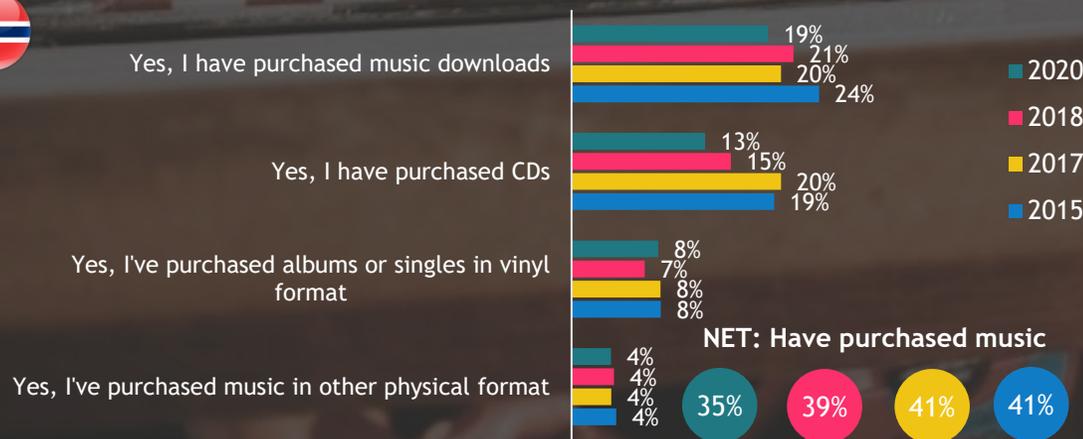
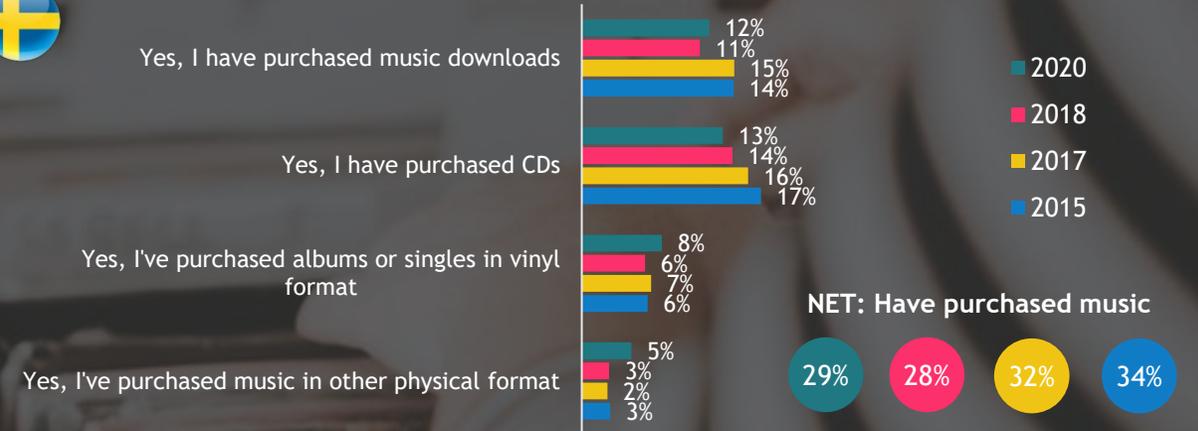
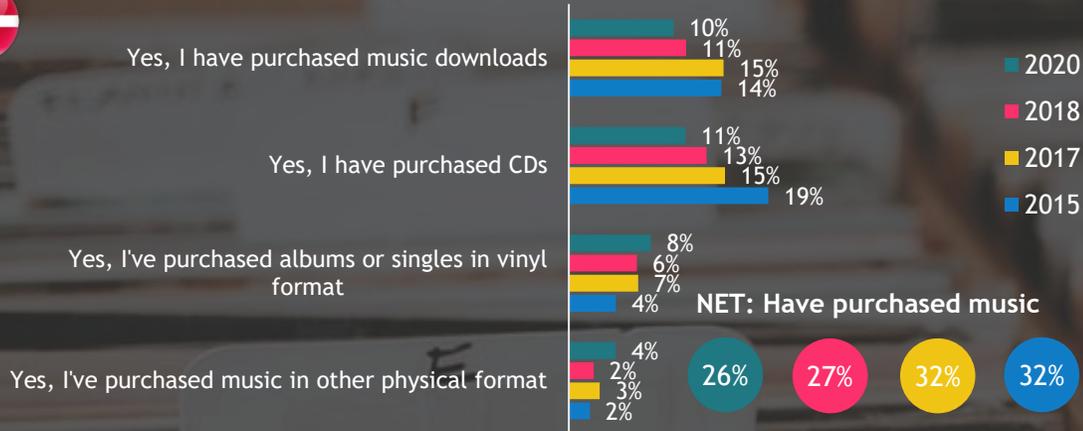
Purchase of music - Nordics

The number of people who purchase music is declining on a Nordic level. The decline is caused by fewer people purchasing CD's



Purchase of music - Countries

Since 2015, the number of people who purchase music has declined significantly in Denmark, Sweden, and Norway while Finland holds a steady level



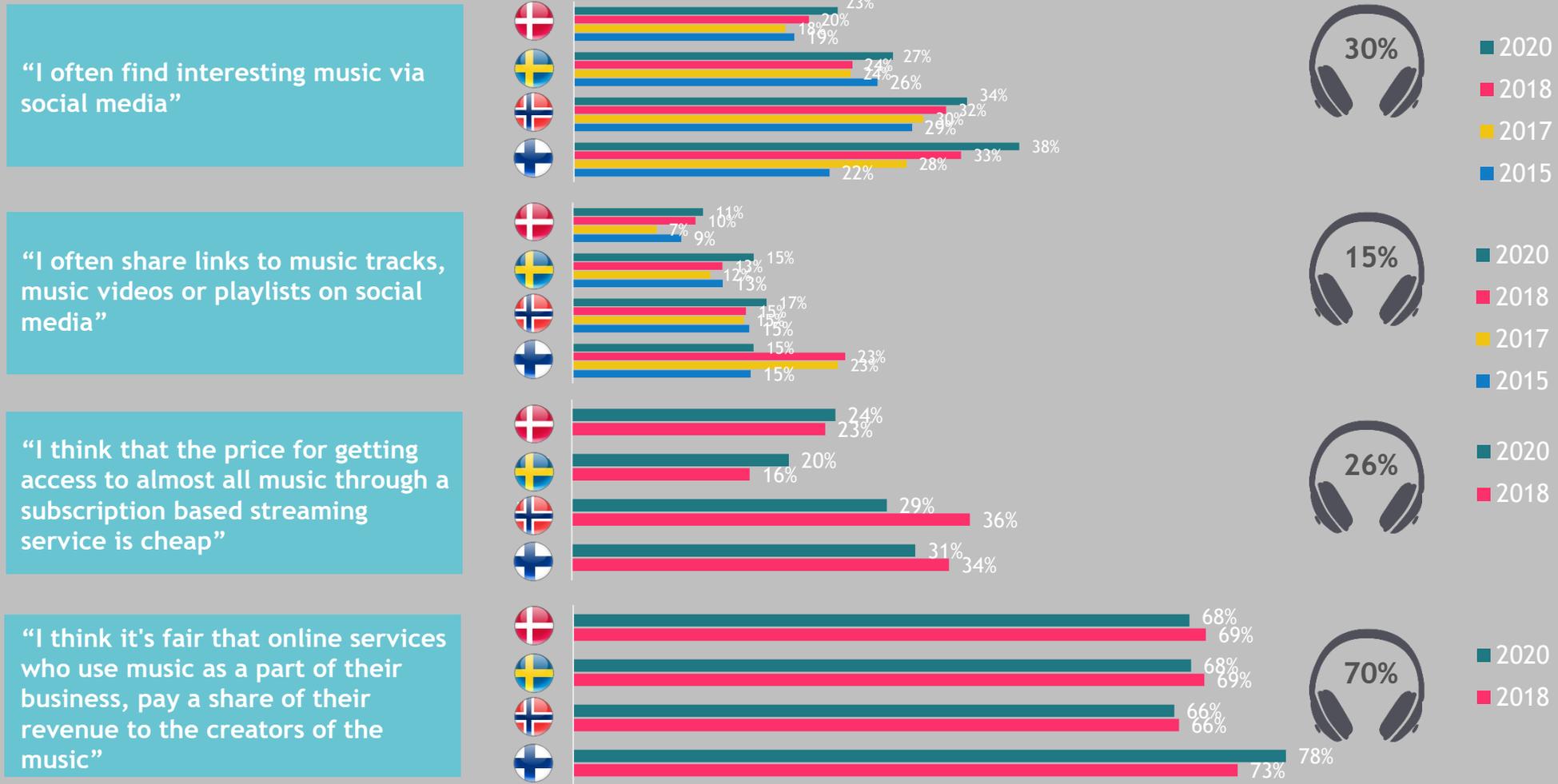
Q6 In the past 12 months, have you purchased music in the form of downloads (iTunes etc.), or physical format, such as CDs or vinyl?
Base: All

Attitudes



Attitudes towards music and rights - Nordics and countries

Across the Nordics, 7 in 10 agree that it is fair that online services who use music pay a share of their revenue to the creators of the music. Compared to Sweden and Denmark, significantly more Norwegians and Finns think that the price for getting access to almost all music through a subscription based streaming service is cheap



Results shown for Topbox [Agree/Strongly agree]

30%
15%
26%
70%

Nordics average 2020

Attitudes towards music and rights - Nordics and countries

Few show a high interest in the five solutions below with the fewest being interested in augmented and virtual reality experiences added to music



Q24 Do you agree or disagree with each of the following statements?

Base: All



TV/movie streaming

Streaming of TV/movie content - an overview of the Nordic markets

Has at least one TV/movie content streaming service

 **70%** (61%)

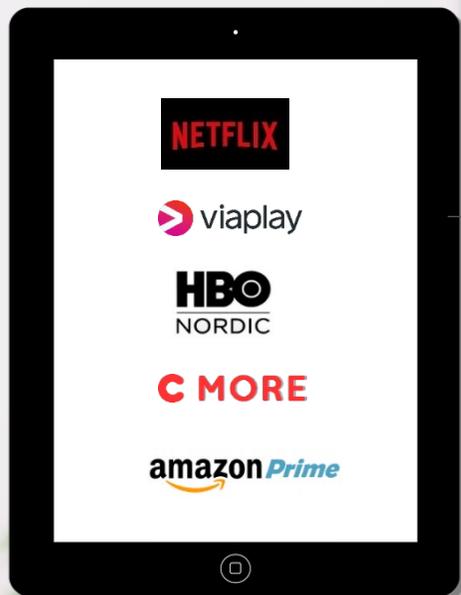
 **68%** (63%)

 **77%** (66%)

 **61%** (58%)

Nordics total

69% (62%)



Average streaming time per day (among TV/movie streamers)

 **2.6 hours**

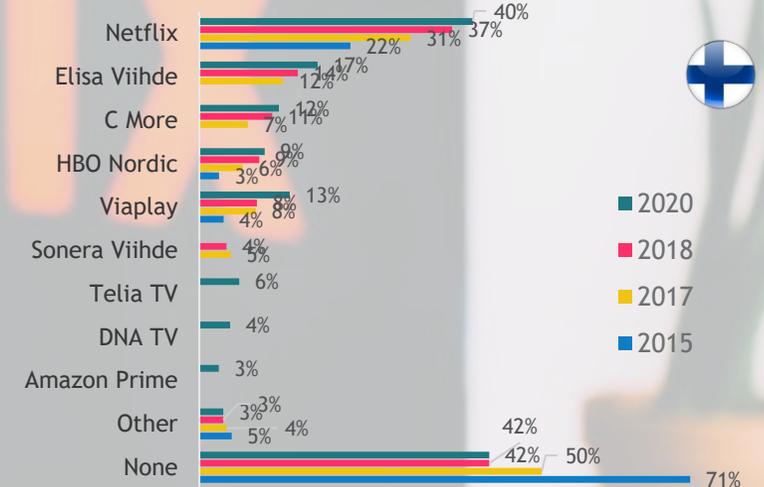
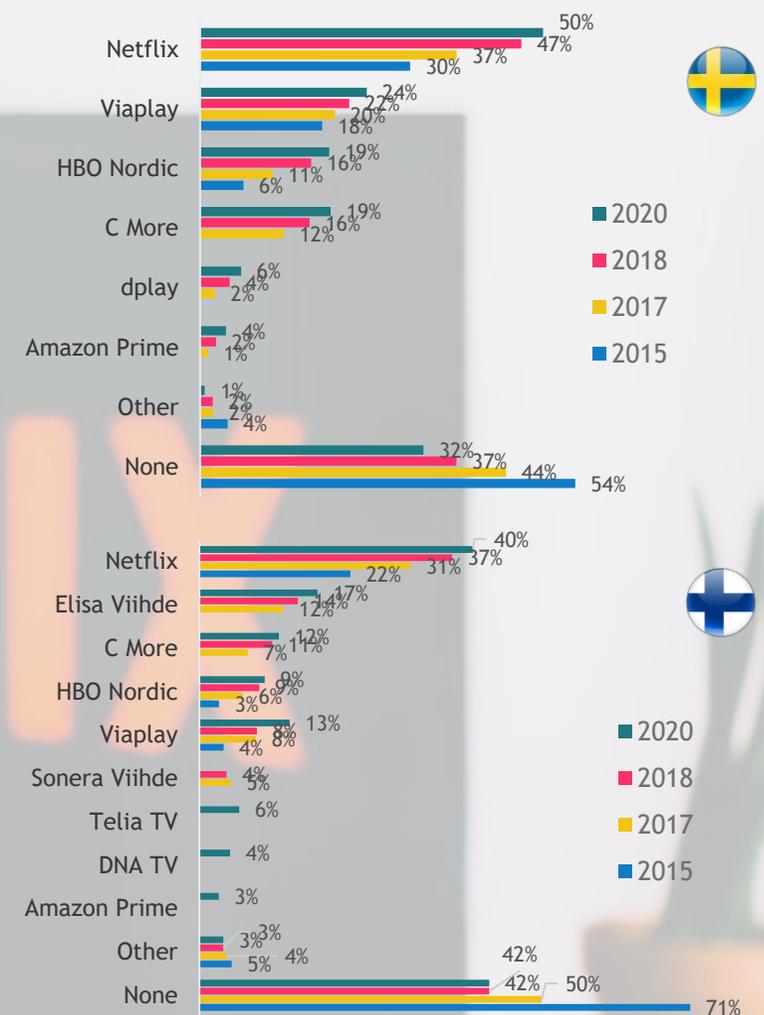
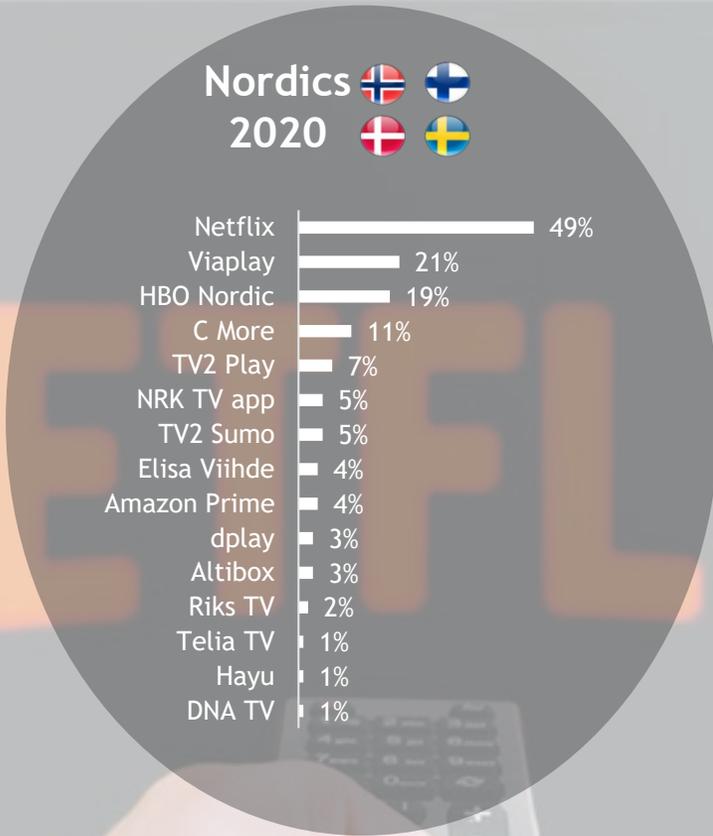
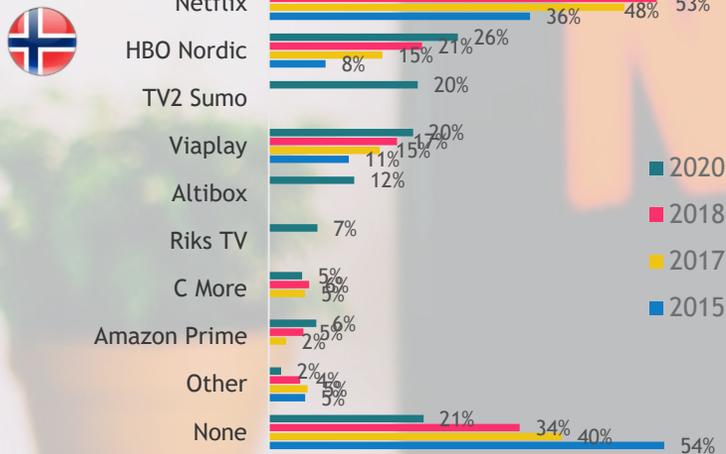
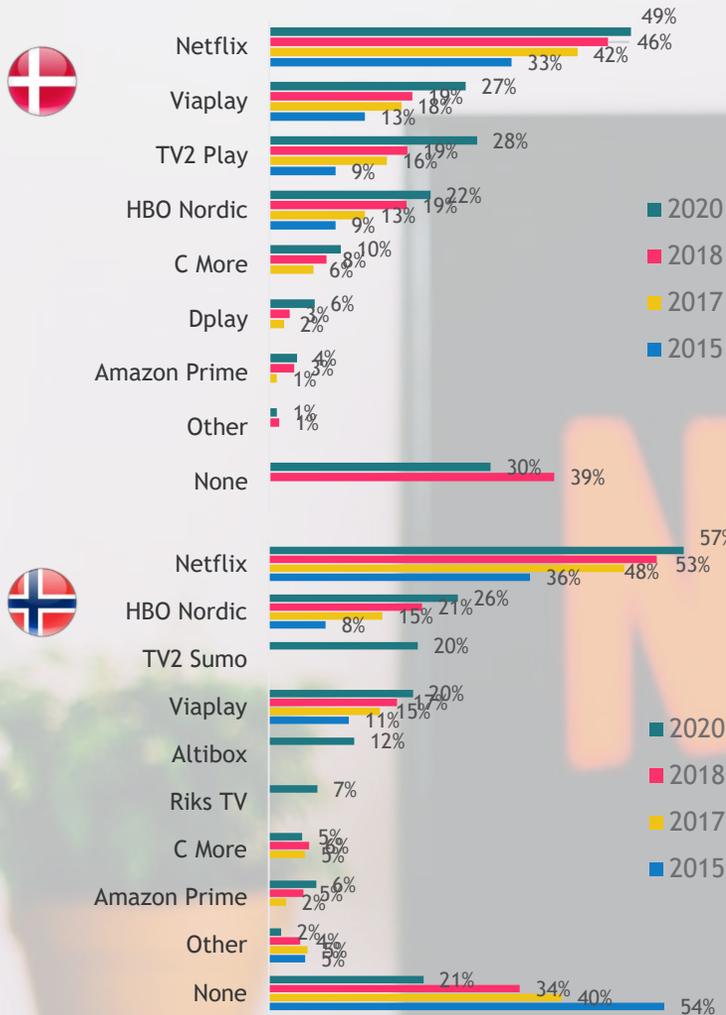
 **2.6 hours**

 **3.2 hours**

 **2.6 hours**

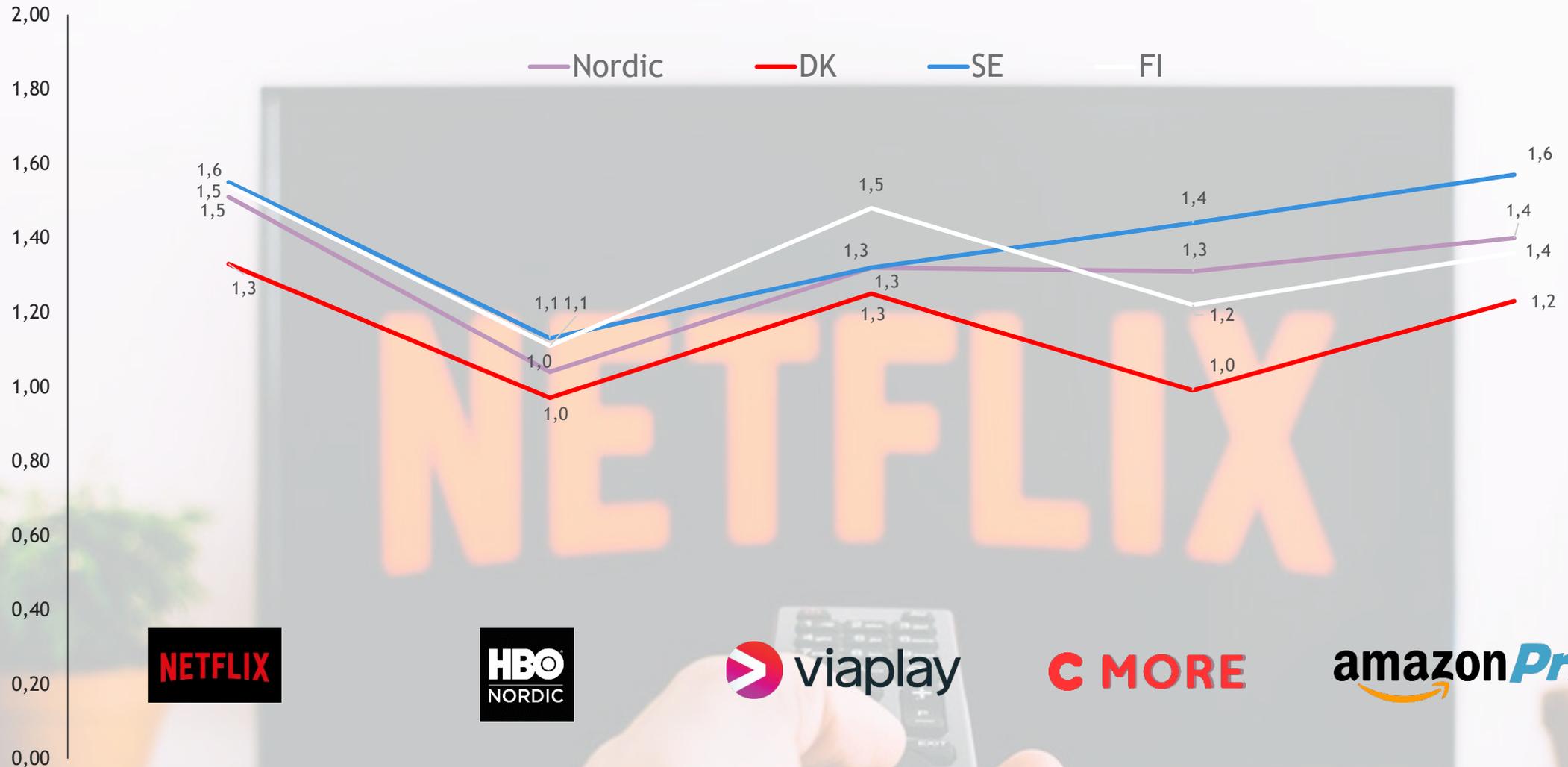
2.7 hours

Across all four Nordic countries, there are significant increases in the number of people who subscribe to video streaming services, Netflix, Viaplay, and HBO Nordic especially



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

On a Nordic level, subscribers spend the most time per day on watching Netflix and Amazon Prime. Locally, Norwegians spend the most time on watching C More. In Denmark, Viaplay is on level with both Netflix and Amazon Prime. Danes in general have a lower daily time usage on video streaming service than their fellow Nordic residents



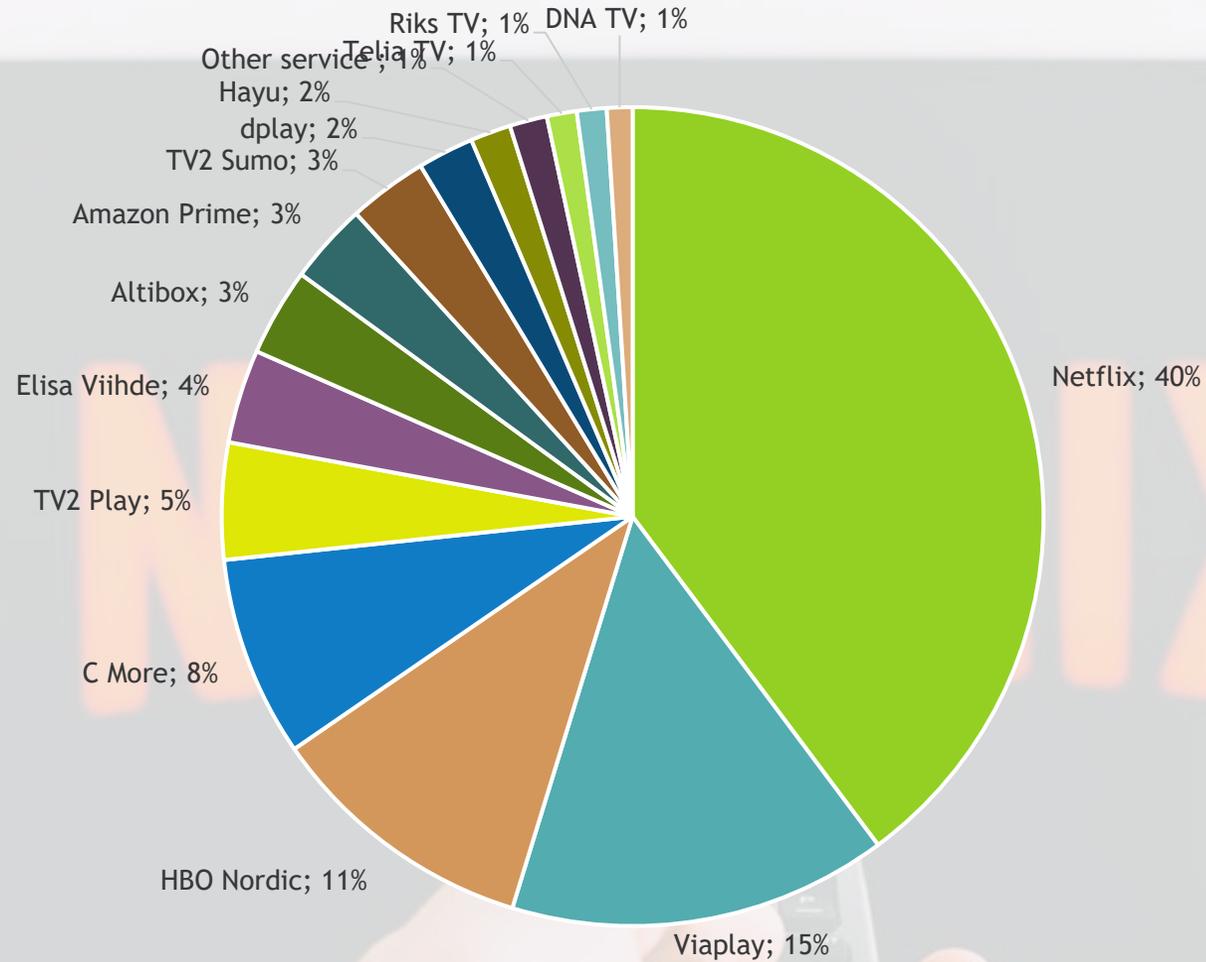
Q12b In a typical week, how many hours per day do you spend on watching TV/video content from the following services?
 Base: Subscribers of the video streaming service

This year, respondents were asked to estimate their **daily** time spent using different services, so the results are not directly proportional to previous years, when respondents were asked to estimate their **weekly** time spent. However the trend suggests that the time spent using different services has continued to increase

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

Across the Nordics, Netflix accounts for 40% of all time spent on paid TV/movie streaming, which is more than twice as much time spent on the second largest player, Viaplay.

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

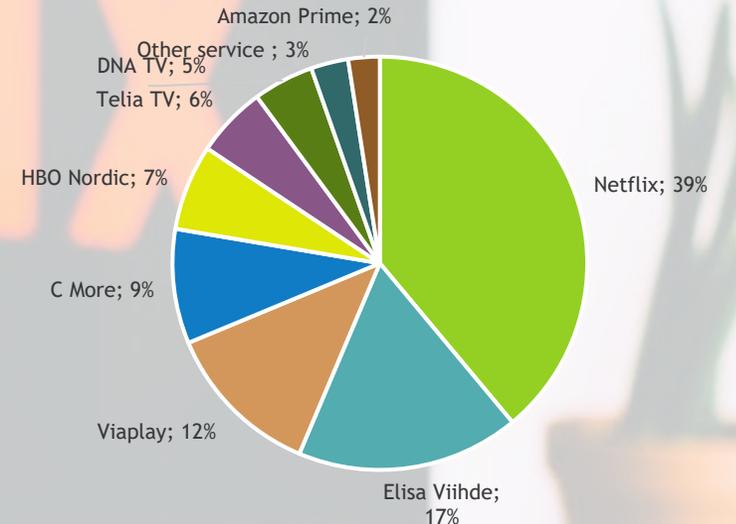
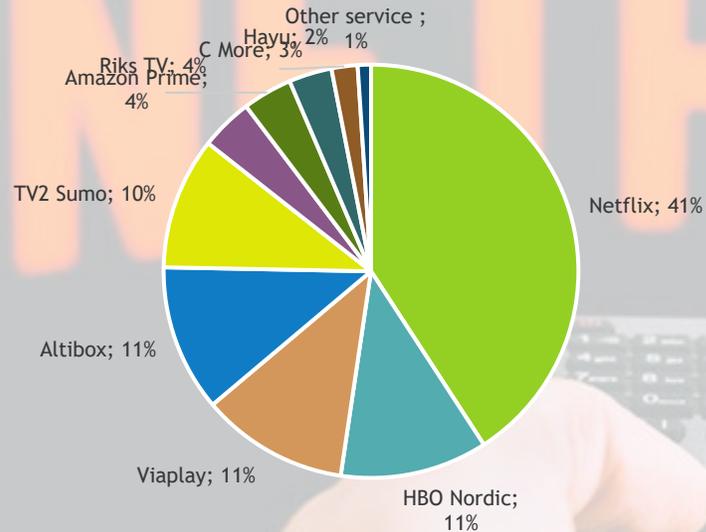
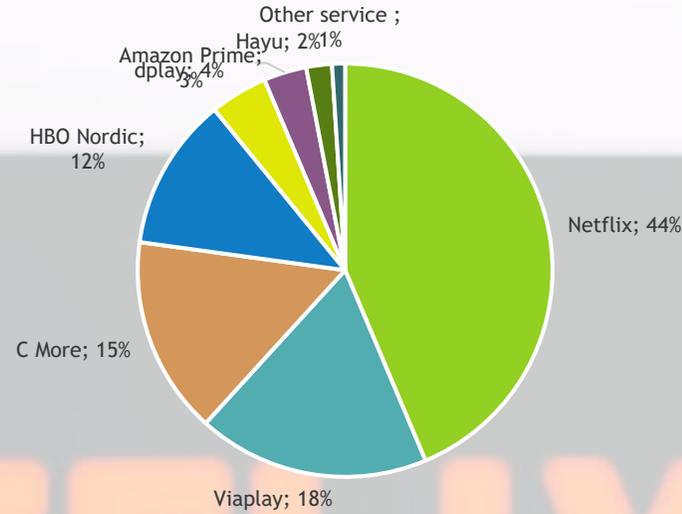
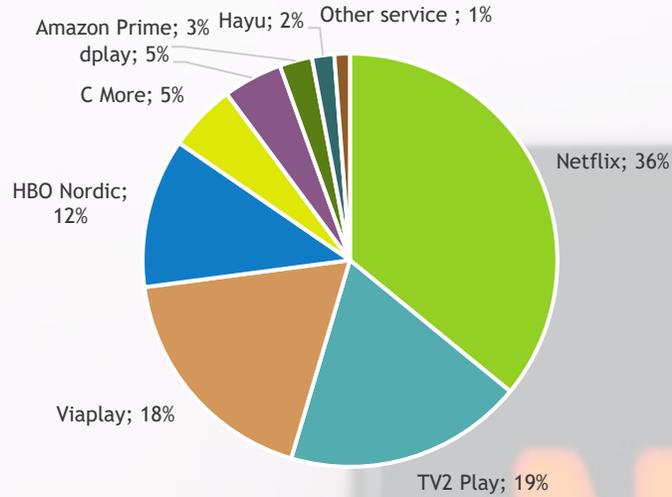


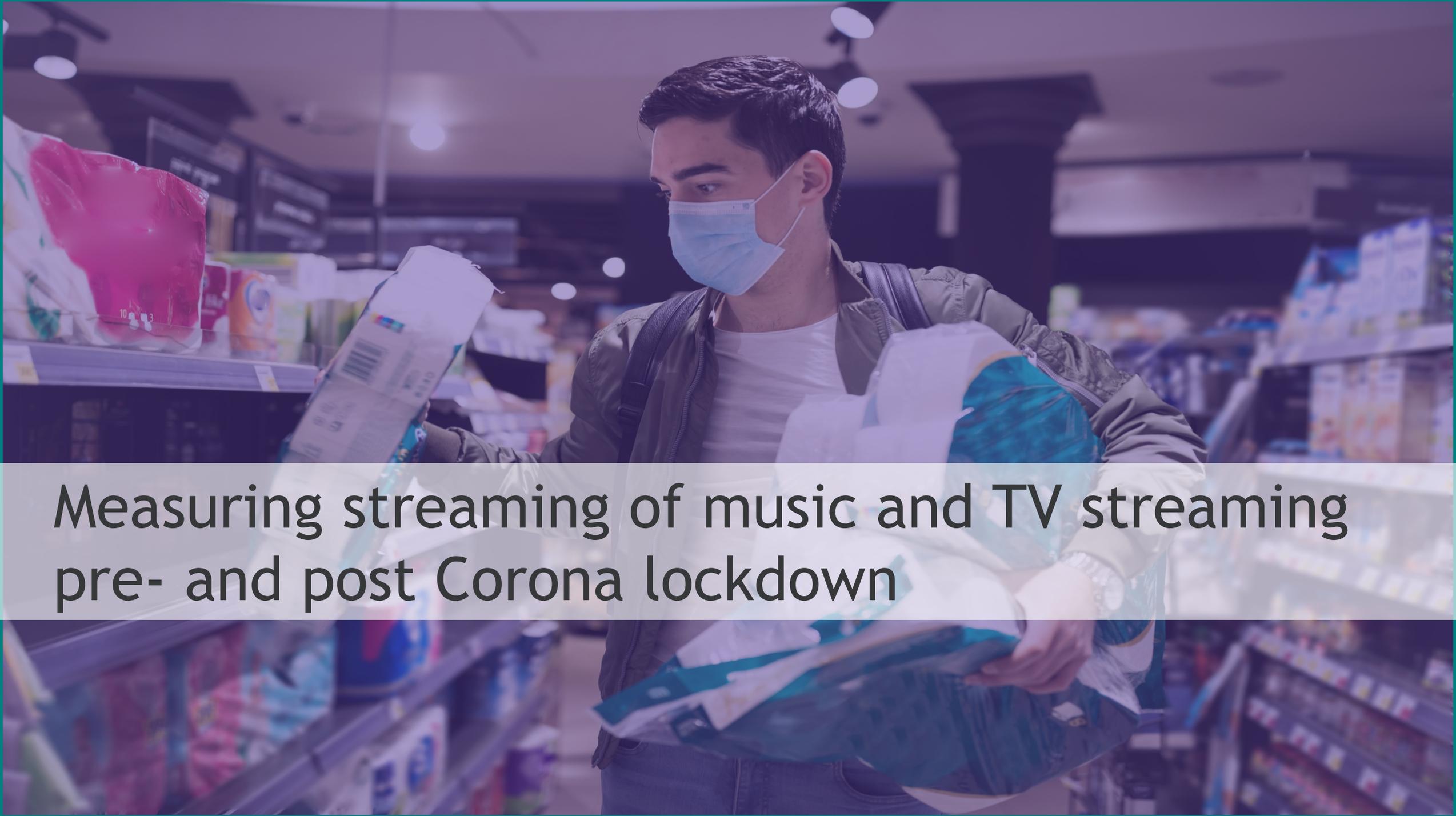
*This year, respondents were asked to estimate their **daily** time spent using different services, so the results are not directly proportional to previous years, when respondents were asked to estimate their **weekly** time spent. However the trend suggests that the time spent using different services has continued to increase.*

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

Netflix is a true large Nordic player, whereas local streaming services mainly fight for second places (except in Sweden, where Viaplay is the second largest player measured on time spent).

*This year, respondents were asked to estimate their **daily** time spent using different services, so the results are not directly proportional to previous years, when respondents were asked to estimate their **weekly** time spent. However the trend suggests that the time spent using different services has continued to increase.*





Measuring streaming of music and TV streaming pre- and post Corona lockdown

Methodology

Measuring streaming of music and TV streaming pre- and post Corona lockdown



Sample

National representative sample on gender, region, and age (18-65 years old) in Denmark, Norway, Sweden and Finland



Methodology

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



Interviews

Pre-Corona (including age group: 18-65):

DK: 940 interviews
SE: 931 interviews
NO: 871 interviews
FI: 882 interviews

Post-Corona (including age group: 18-65):

DK: 1013 interviews
SE: 1011 interviews
NO: 1012 interviews
FI: 1008 interviews



Field Period

Pre-Corona:
27 December 2019-9 January 2020

Post-Corona:
3-14 April 2020

The following results show selected results from the survey “Digital Music in the Nordics” which was re-run again after the emergence of the Corona pandemic.

The results are based on 18-65 year olds and the results from the pre-Corona survey thus differ slightly from the results shown in the first part of the report as they are based respondents aged 12-65.

Nordic Summary - music and TV streaming pre- and post the Corona lockdown

Prior to the Corona pandemic

40%

paid for a music streaming service across the Nordics

49%

used a paid music streaming service

53%

used Spotify when listening to music

20%

used Facebook when listening to music

32%

of the time spent on music streaming came from paid music services

68%

subscribed to a TV streaming service

1 month into the Corona lockdown

41%

pay for a music streaming service across the Nordics. People paying in Denmark has decreased, but increased slightly in the other countries

49%

use a paid music streaming service, but great local differences are seen. In Denmark the share of users of paid services has gone down from 56% to 50%

56%

use Spotify when listening to music. Denmark has decreased the number of users, but this is more than accounted for in the other countries

25%

use Facebook when listening to music. All countries have increased number of Facebook music listeners

31%

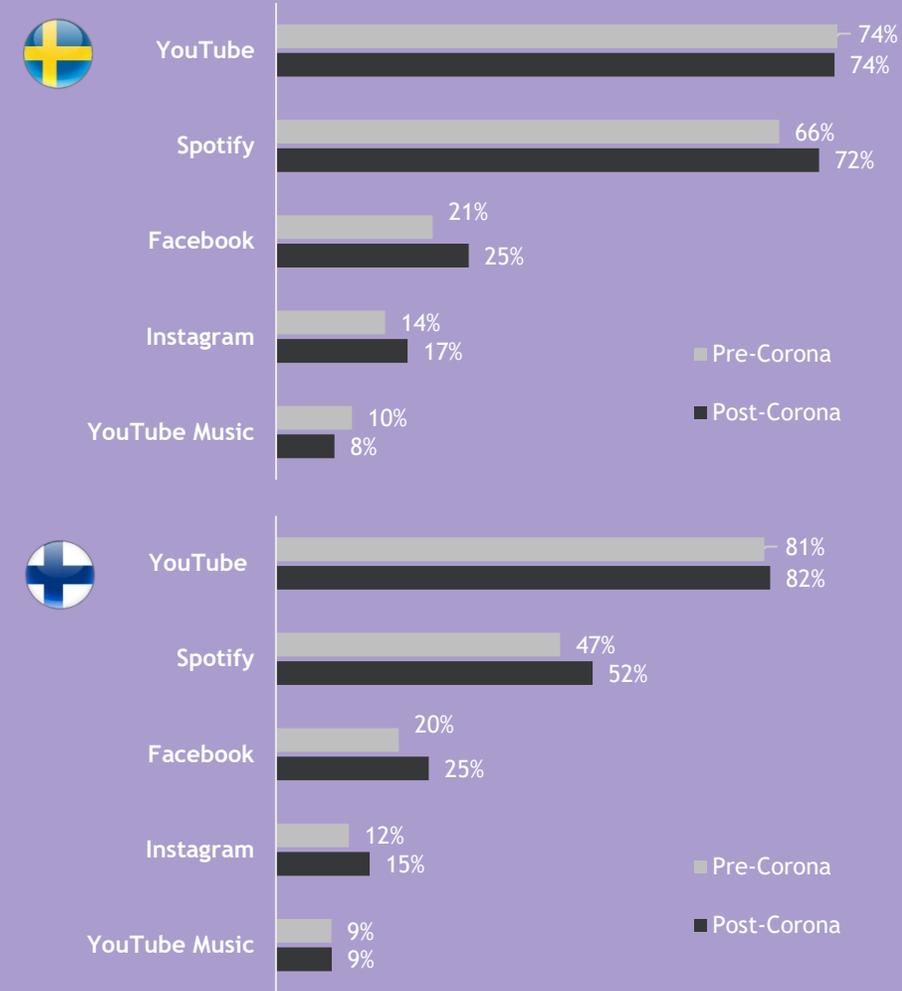
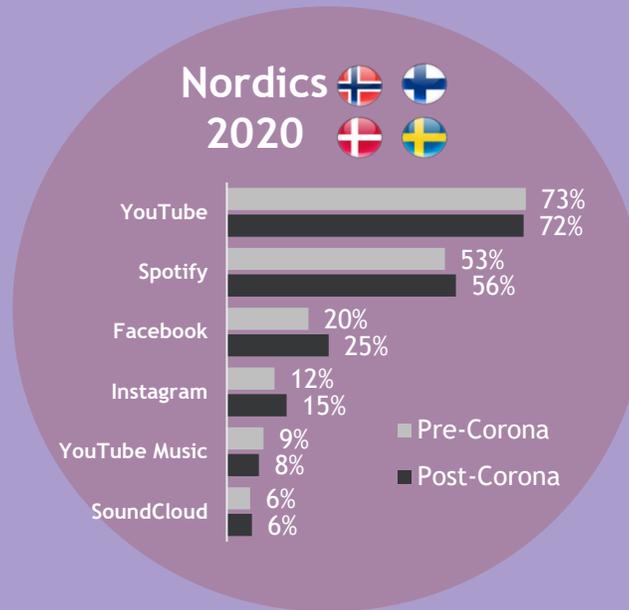
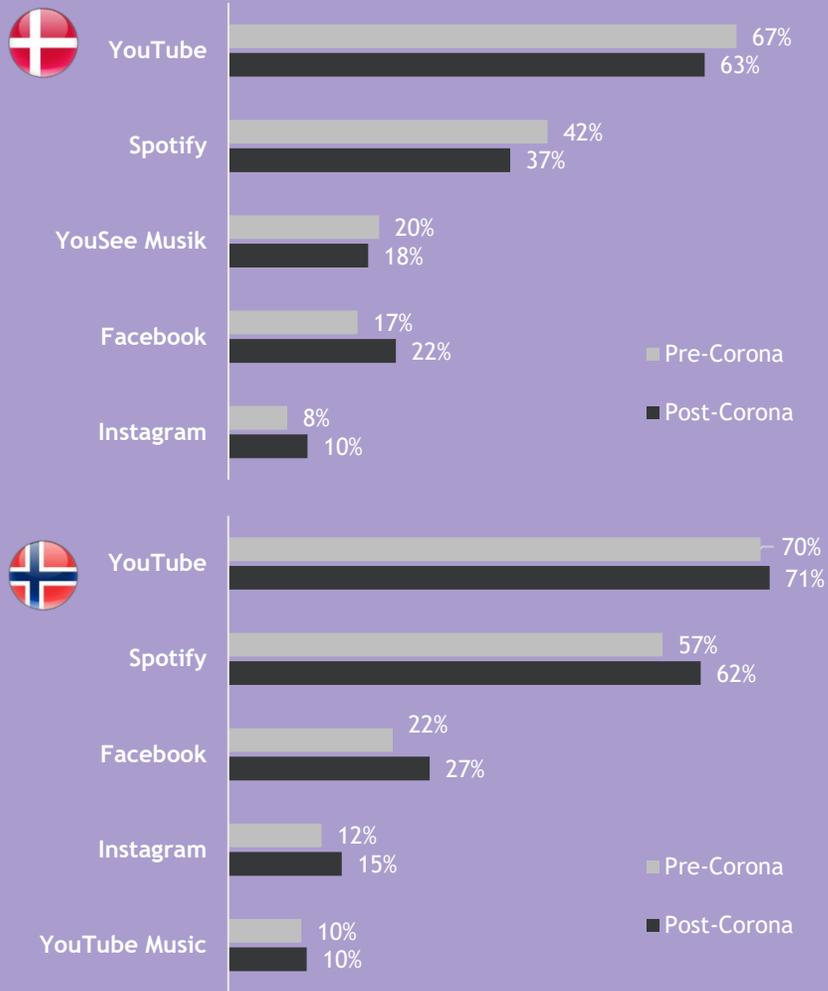
of the time spent on music streaming comes from paid music services. The trend of less paid music is seen in Denmark only due to the smaller user base of Spotify which impacts the Nordics results overall for paid music

71%

subscribe to a TV streaming service. All countries experience small increases, but no significant increases are seen among the largest players

Top audio and video services used for streaming of music - Pre- and post Corona lockdown

Except in Denmark, the usage of Spotify has overall increased after the corona lockdown. Further, listening to music on Facebook and Instagram has increased significantly in most countries



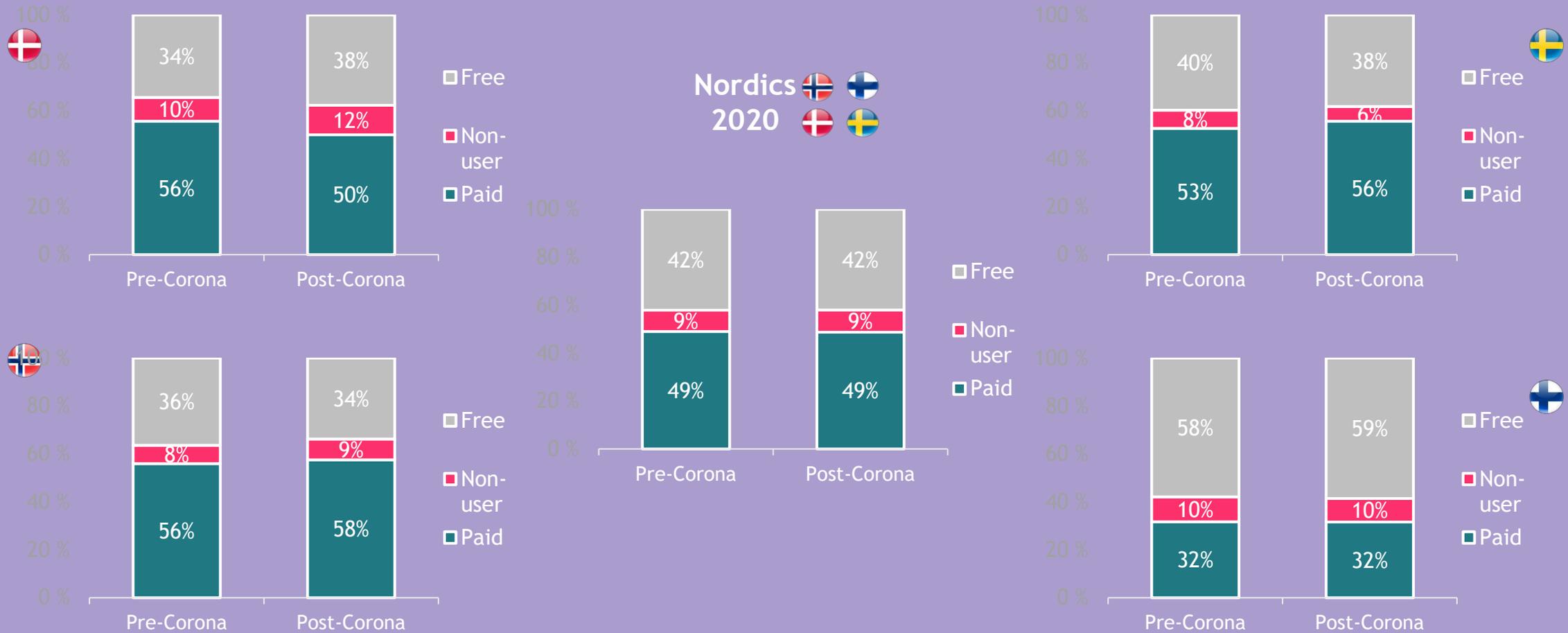
Q7a Which of the following digital music services do you use when listening to music?
Base: Pre: 3623, Post: 4044

Q7b Which of the following digital services/social media do you use to watch or listen to music or music videos?
Base: Pre: 3623, Post: 4044

Users of music streaming - pre- and post corona lockdown

The share of users of paid, free and non-users remains unchanged overall in the Nordics after the Corona lockdown, but local changes are seen. Denmark has decreased the number of users of paid services, whereas this has increased in Sweden and Norway. No changes are seen in Finland

Share of people using paid, free and no music streaming service

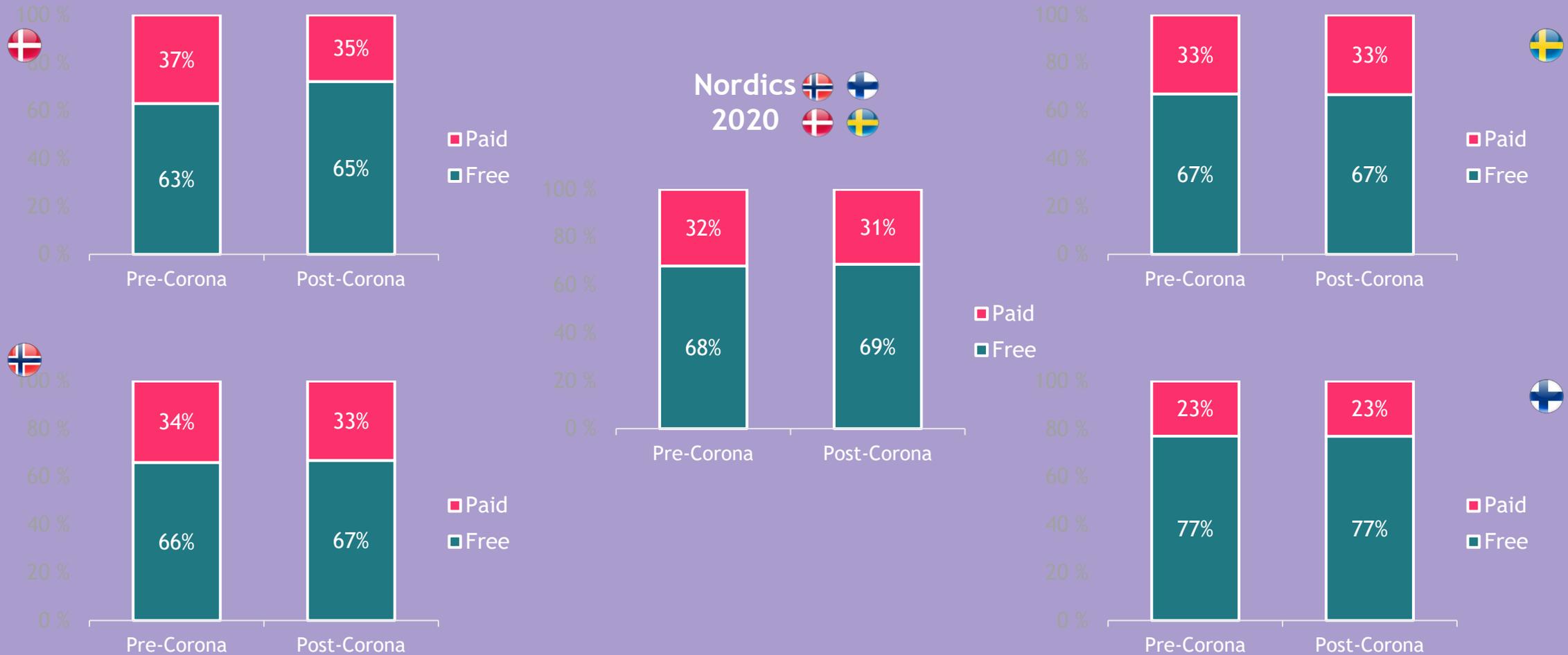


Q7a Which of the following digital music services do you use when listening to music?
Base: Pre: 3623, Post: 4044

Q7b Which of the following digital services/social media do you use to watch or listen to music or music videos?
Base: Pre: 3623, Post: 4044

Daily time spent on the paid and free audio and video services used for streaming of music - Pre- and post Corona lockdown
 Post Corona lockdown, Danes tend to spend a little more time on free music streaming services.
 The levels for the other countries have not changed due to the Corona situation

Share of time used on paid vs. free music streaming

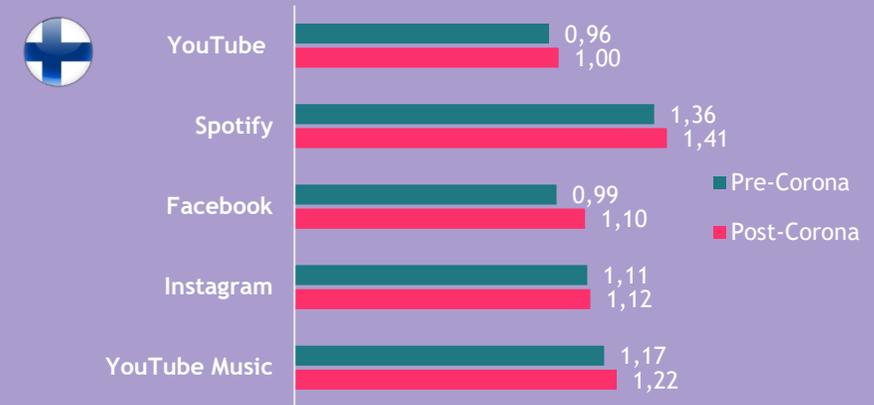
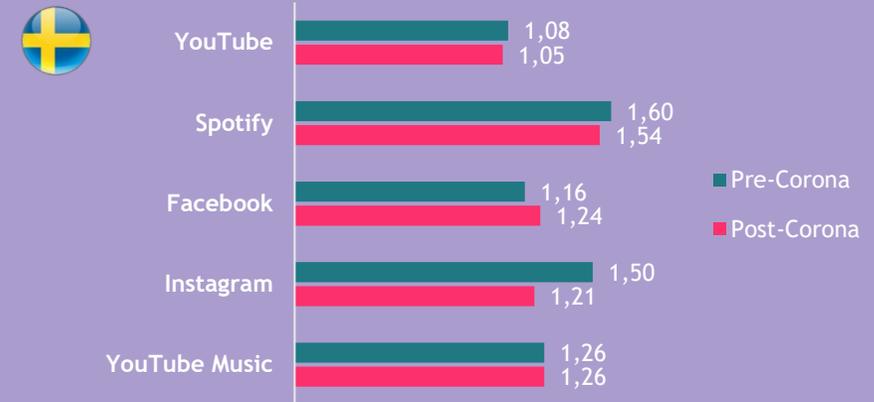


Q8a In a typical week, how many hours per day do you spend listening to music or watching music videos on the following digital services?
 Base: Use digital service to listen to music

Time spent per day on largest music streaming players - Pre- and post Corona lockdown

Time spent on listening to music on Facebook has increased in all four countries after the Corona lockdown. Instagram users in Sweden use much less time on listening to music compared to before the lockdown

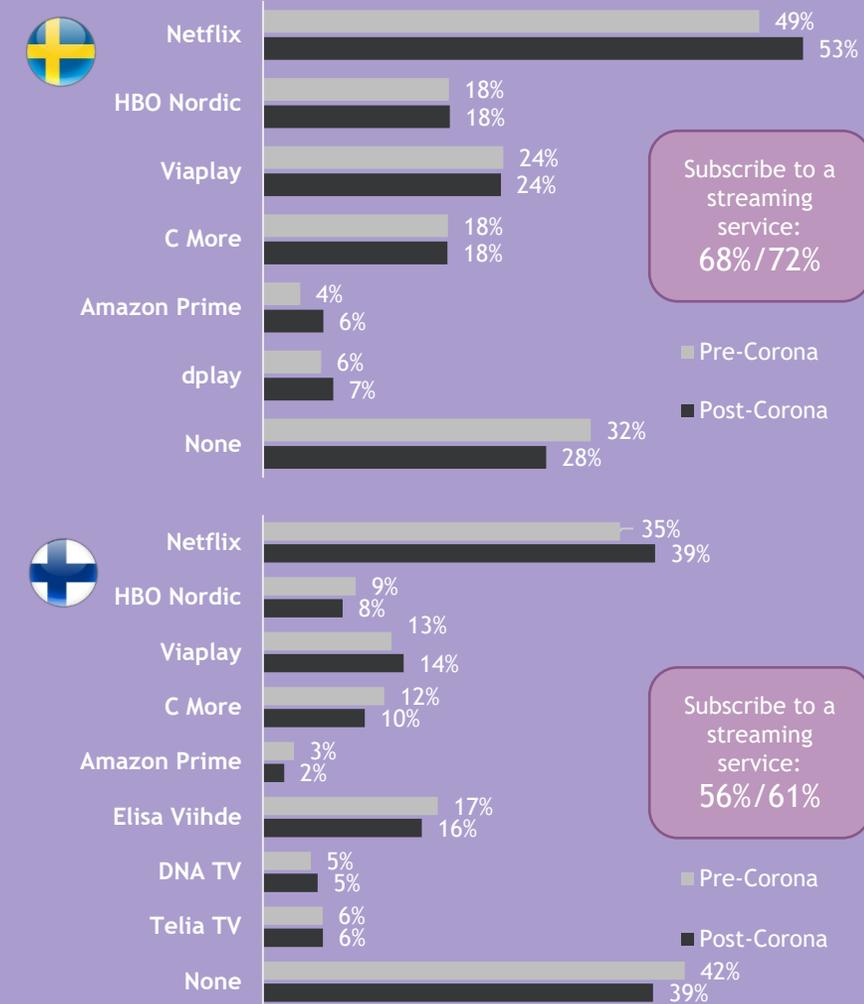
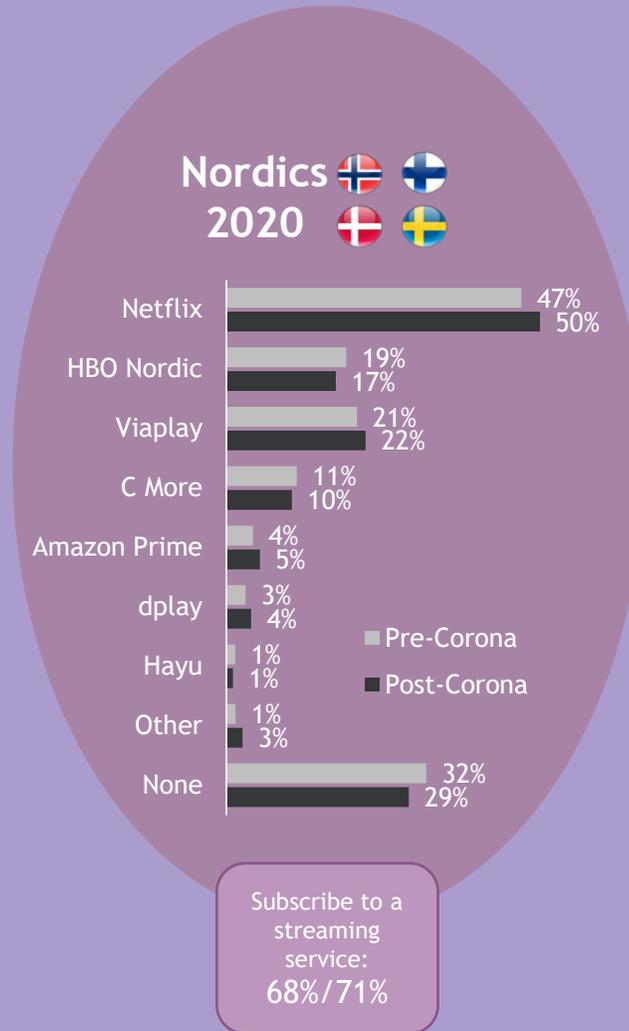
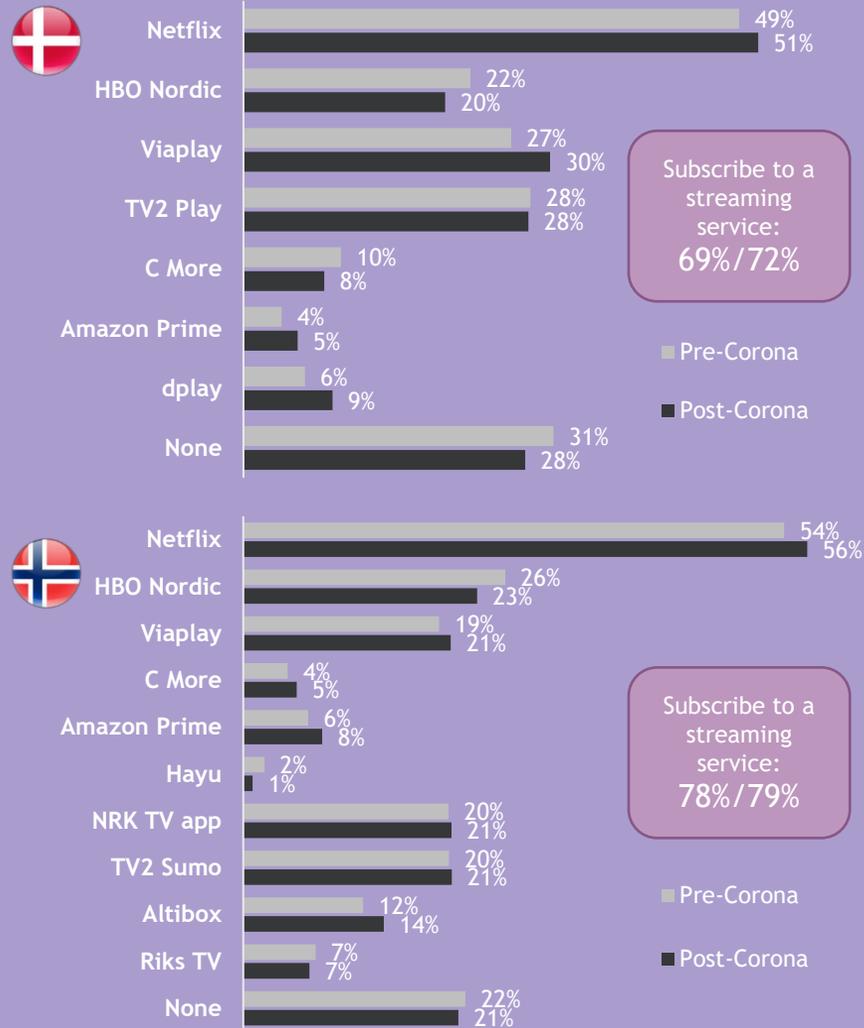
Daily average time spent on music streaming services



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

Streaming of TV/movie content - Nordics and countries

Though small positive changes are seen in the share of people subscribing to TV streaming services pre- and post the Corona lockdown, no significant changes at all are seen among the largest players

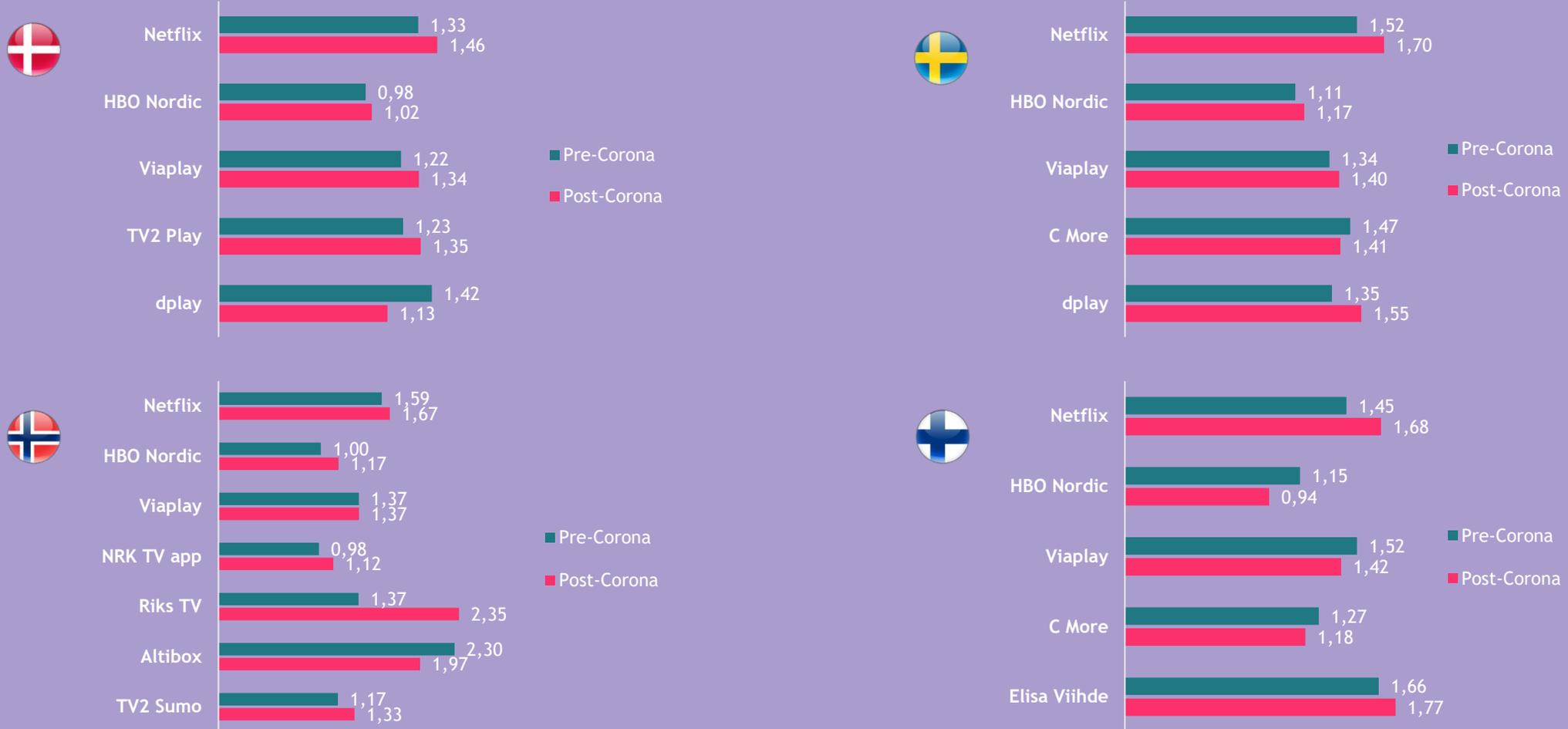


Q11 Do you currently subscribe to one or several of the following digital services providing TV and/or movie content?
Base: All

Time spent per day on largest TV streaming players - Pre- and post Corona lockdown

Overall, users of most of the streaming services, have increased their viewing time after the corona lockdown. The three largest players - Netflix, HBO Nordic and Viaplay - are being used more compared to before the lockdown (with the exception of HBO and Viaplay in Finland)

Daily average time spent on TV streaming services



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



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Meet your team



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Senior Research Consultant

Thomas joined YouGov in 2015. Thomas has 20 years of experience in market research and consultancy within a row of different businesses - e.g. media, TV/streaming, culture, telecom, finance and medical. Thomas knows the entire research portfolio and work with the more heavy and complex surveys like segmentation, conjoint and combination studies. Thomas has a master's degree from Copenhagen Business School.

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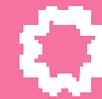
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