MUSIC LISTENING IN FINLAND 2022

Survey and analysis: Kari Tervonen, Roadmap Director Omnicom Media Group





We surveyed the current state of music listening in Finland for the ninth year in a row. We interviewed 1,054 Finns aged 13–75.

We compared the results extensively against other data sources and earlier years.

Background

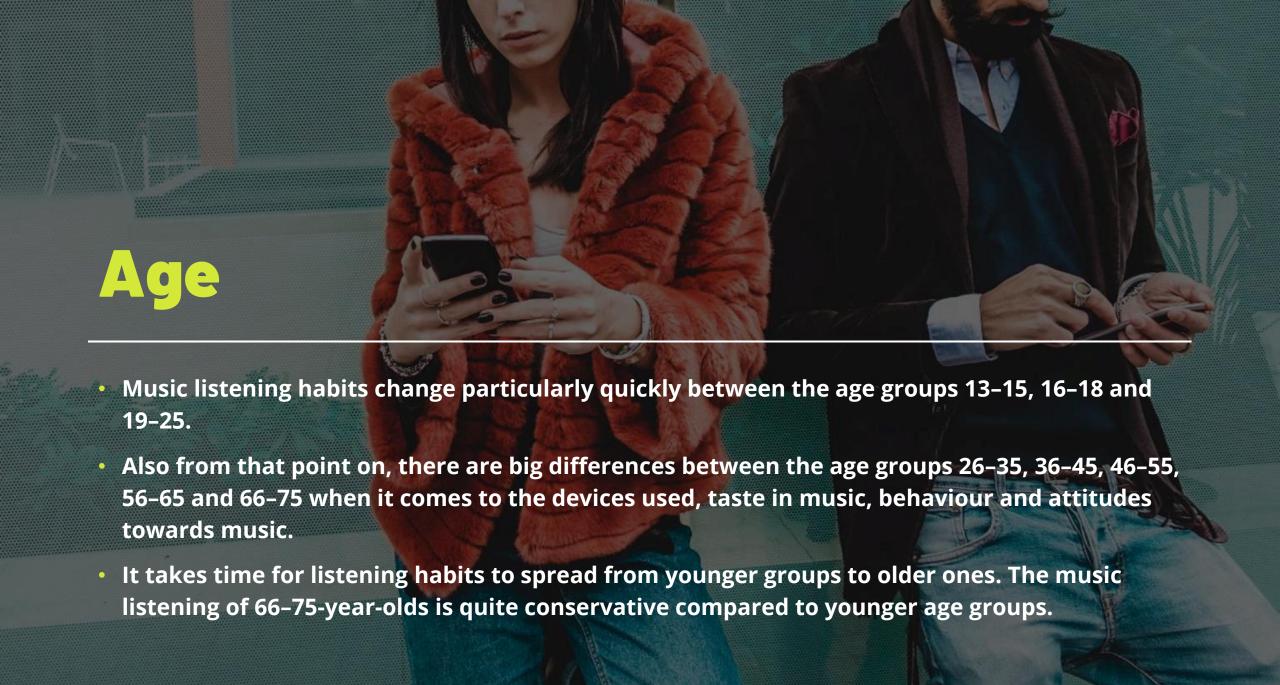
- Norstat interviewed 1,054 Finns in its consumer panel in mid-August 2022.
- We specifically sought respondents aged 13–15 and 16–18.
- The key findings were weighted to represent the nationwide age and gender structure of Finland's population between the ages of 13 and 75.
- The survey's results were analysed by Omnicom Media Group's Kari Tervonen, who has plenty of experience in researching everyday behaviour. Susanna Perämaa from Teosto and Tommi Kyyrä from IFPI Finland are the group's music industry experts.
- The survey produces information in serial form on how Finns' music listening habits are changing over the long term.



Contents

- 1. On music listening habits
- 2. On short videos taking over the world
- 3. On concerts
- 4. On artists
- 5. On the sociological beauty of chart music





Deeper into the digital

PART 1: On music listening habits: devices

Respondents' own estimate of the daily time they spend listening to music:

Average: 1 hour 45 minutes a day

Median: about one hour a day

The daily time spent listening to music varies by age group from 1.5 hours (over-60s) to 2 hours (16–25-year-olds).

The share of the time spent on focused listening

(Respondents could distribute 100% to the various options)

I focus on listening

20%

My listening is fairly focused, even though I'm also doing other things

35%

The music is on the background, and I listen with half an ear

45%

The share of focused listening has started to increase again. The decline in listening to physical recordings decreased focused listening for a long time. Today, listening to digital music complements listening to the radio, and the listening is often more intent.

Respondents' own estimate of the distribution of their music listening by device (Respondents could distribute 100% to the various options)

Radio stations
Digital music services
Recordings

40% 55% 5%

In measured listening minutes, the radio is still number one, but the respondents' own estimates emphasise intent listening.

Respondents' own estimate of the distribution of radio listening by device

(Respondents could distribute 100% to the various options)

| Car radio | 50% |
|------------------------|------------|
| Separate radio device | 40% |
| Phone + computer, etc. | 10% |

Which devices have Finns used to listen to music in the past 24 hours?

| | All | Change vs. 2021 | Change vs. 2019 |
|--------------------------------|-----|-----------------|-----------------|
| Car radio | 62% | +2% | 0 |
| Phone | 49% | -3% | +4% |
| Computer | 26% | -3% | -4% |
| Separate radio device | 29% | +4% | -5% |
| In-car streaming | 21% | +1% | +7% |
| Tablet | 7% | -3% | -4% |
| CD player in the car | 6% | -3% | -5% |
| CD player at home | 6% | +1% | -4% |
| Voice-controlled smart speaker | 4% | 0 | not measured |
| Record player | 1 % | 0 | not measured |

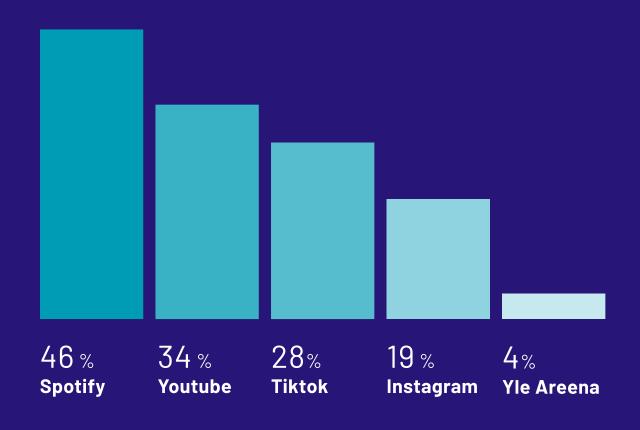
Which devices have Finns used to listen to music in the past week?

| | All | 13-18 | 36-55 | 66-75 |
|-------------------------------|---------------|-------|-------|-------|
| Car radio | 77% | 78% | 78% | 77% |
| Phone | 68% | 92% | 71% | 15% |
| Computer | 41% | 53% | 43% | 13% |
| Separate radio device | 41% | 24% | 38% | 65% |
| In-car streaming | 30% | 53% | 29% | 4% |
| Tablet | 16% | 20% | 16% | 15% |
| CD player at home | 12% | 8% | 13% | 12% |
| CD player in the car | 10% | 6% | 12% | 5% |
| Voice-controlled smart speake | er 7 % | 15% | 7% | 0% |
| Record player | 3% | 2% | 4% | 0% |

Daily consumption of music content in different services

Of the subscriptions to Spotify and similar music streaming services, 60% are paid and 40% are free

Spotify's market share of music streaming service use is about 90%.



^{*}YouTube not included in the estimate

On short videos taking over the world

PART 2: How music spreads today

In the survey results for 2013–2021, Facebook, YouTube and Instagram increased their user numbers in the large age groups, eventually reaching those of traditional media.

In 2019–2022, the fastest-growing format in advertising was short videos on social media, which are much more effective at generating reactions than photos and written content.

Following TikTok, the bigger social media companies have also increased the role of short videos on their platforms.

Due to the rise of short videos, vloggers and YouTubers that have spent years in obscurity are rapidly gaining popularity.

Music spreads via social media influencers.

And the users themselves spread music by adding it to their videos.

The use of music services and content

| | Weekly | Daily | ages 13-18 daily |
|--------------------------------------|--------|-------|------------------|
| | | | |
| Spotify or similar streaming service | 66% | 51% | 88% |
| YouTube (music content) | 57% | 34% | 49% |
| TikTok | 34% | 28% | 73% |
| Instagram (artists' accounts) | 29% | 19% | 39% |
| Vloggers/YouTubers | 27% | 18% | 56% |
| TikTok (artists' accounts) | 15% | 10% | 37% |

On TikTok's influence on music

- Two out of three TikTok users add songs they discover on the platform to their streaming playlists.
- TikTok is a key launching channel for record labels.
- Social media influencers are paid to highlight hits and new artists.
 The use of micro influencers is emphasised so that making versions of the video spreads.
- Videos clips are made, and users can then use the clips to make their own versions of them.
- Short videos provide inspiration as well as ideas for songwriting.
- TikTok contributes to the fact that the average length of this summer's chart songs is shorter than ever – often about 2 minutes and 30 seconds.

The youngest are still the most likely to create their own content: in the past week, one in three under-18s and one in ten 19-25-year-olds have created content for TikTok.

Nearly two thirds of under-18s have created TikTok content at least occasionally.

Comments that illustrate the youngest respondents' way of using TikTok

"Almost all the music I listen to I've discovered on TikTok."

"You don't have to go looking for music. Everything on there always has music."

"I follow YouTubers on TikTok (and come across music through that)."

The most popular artists on TikTok in August 2022

- Doja Cat
- Harry Styles
- Billie Eilish
- Sexmane
- Ramses II

- Justin Bieber
- william
- JVG
- Benjamin
- Jambo, Gettomasa, Ghost, Taylor Swift, Eminem

The most popular songs often change every few weeks. On the radio and on Spotify, hits often endure for more than half a year.

Instagram Reels competes directly with TikTok by providing a similar experience. About half of Instagram's content reactions are generated by reels and videos.

About half of the most followed accounts on Instagram belong to music artists.

YouTube and Facebook are following hot on the heels to stay in the race.

Instagram's most followed artists also include artists who are popular with older age groups

- Sanni
- Antti Tuisku
- Harry Styles
- Vesala
- Robin
- · Lauri Tähkä
- JVG

- Eminem
- Ed Sheeran
- Justin Bieber
- Selena Gomez, Billie Eilish,
- Tuuli, Gettomasa, Blind Channel, Benjamin
- Suvi Teräsniska, Michael Monroe, Kaija Koo, Apulanta, Anna Abreu

More than half of under-18s also watch longer music videos weekly: they are consumable items that come and go.

The question about one's favourite music video is most likely to be answered by 50-year-olds, 40% of whom watch music videos weekly.

The respondents' favourite music videos

Michael Jackson: Thriller (with the votes of former teens)

Psy: Gagnam Style

Portion Boys (feat. Matti & Teppo): Vauhti kiihtyy

Queen: Bohemian Rhapsody

Billie Eilish: NDA

Ed Sheeran: Shivers

Harry Styles, Taylor Swift, Rammstein, Evanesence, Depeche Mode, Juha Tapio, JVG, Metallica, Antti Tuisku

On concerts

PART 3: A record amount of money was spent on concerts in summer 2022,

even though some respondents still avoided mass gatherings.

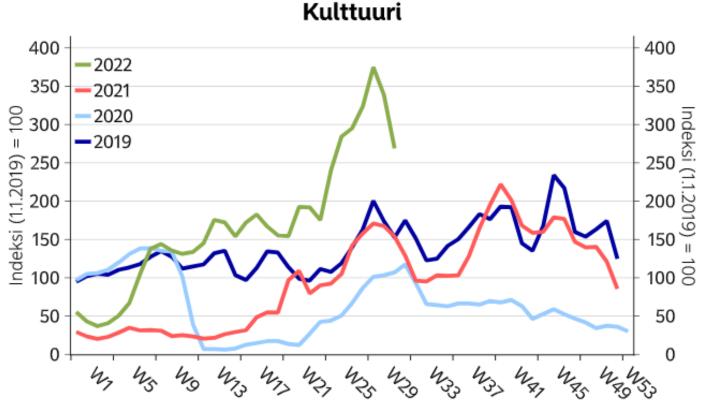
Concert attendance recovered and sales broke records

- About 40% of Finns attended a paid concert in January-July 2022.
- One in three Finns attended a paid concert in summer 2022.
- Ticket sales doubled compared to summer 2021.
- One in three Finns attended a free live music event in January-July 2022.

Spending on culture

The card payment data published by Nordea shows that spending on culture was high this summer.

Thanks to the summer the whole year has so far been better than 2019.



Lähde: Nordea ja Macrobond

Event attendance is still being hindered

Attended live music events as usual in 2022

COVID-19 and social distancing are still reducing attendance at live music events

Has not attended any concerts due to COVID-19

The respondent's own financial situation/desire to save money reduced their concert attendance

38% 50% ages 16-35

19%

20% 40% ages 66-75

35%

The genre of the last concert I attended

| Pop | 39% |
|-------------|-----|
| Rock | 32% |
| Schlager | 23% |
| Hip hop/Rap | 14% |
| Metal | 10% |
| Classical | 7% |
| Jazz | 6%* |
| | |

Pop finally surpassed rock in live music. Pop and rap are by far the most popular among under-25s, while rock matches their popularity among 25-55-year-olds. Schlager becomes the most popular genre at 60 years of age.

*The figures amount to more than 100% because respondents were allowed to pick more than one option (for example, a third had most recently attended a festival).

I most recently attended a music event

(NB! asked in August)

33% at a festival

51% ages 19-35

18% at a restaurant

25% ages 36-55

15% at a stadium or ice rink

15% at a concert hall

34% ages 66-75

7 % at a dance hall

15% ages 66-75

13% somewhere else: market square, shopping centre, etc.

On artists

PART 4: Awareness of new artists & favourite artists by genre.

After a break of three years, we asked respondents about their awareness of new artists. 13–25-year-olds were the most aware of new artists.

As most Finns listen to songs rather than artists, even a big hit will not guarantee a major breakthrough, unless the artist also becomes known for other things.

For example, william's Penelope in 2021 stayed at the top of the Spotify chart longer than any other song, and the song also got a lot of radio play. However, less than half of Finns know him by name, and about half of 13–18-year-olds don't know his music.

Awareness of new artists, 13-75-year-olds

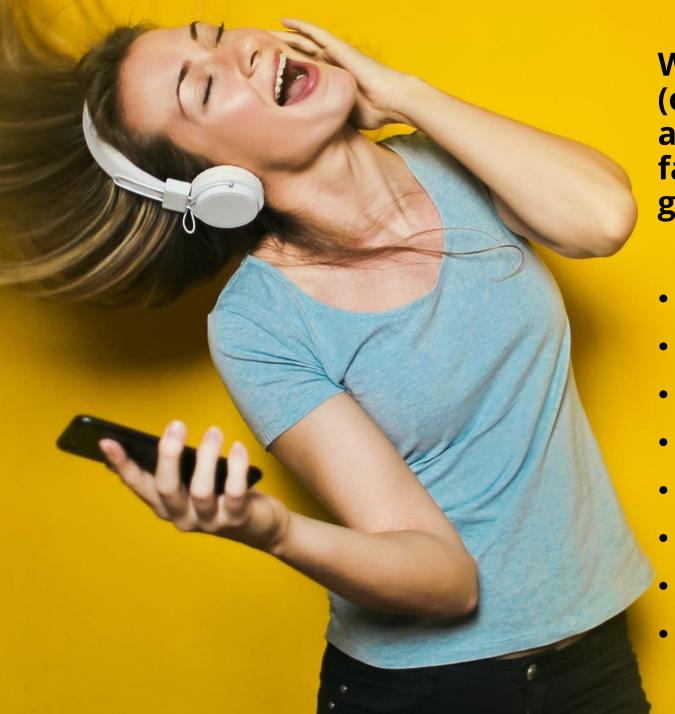
| Artist | Label | Knows by name | Knows the music | Likes |
|----------------|-------------------|---------------|-----------------|-------|
| BESS | Universal | 65 % | 43 % | 27 % |
| Viivi | Capitol/Universal | 43 % | 22 % | 13 % |
| Olli Halonen | Mökkitie/Warner | 42 % | 24 % | 17 % |
| william | M Eazy/Sony | 42 % | 24 % | 6 % |
| Yeboyah | Abenayo/Sony | 41 % | 20 % | 7 % |
| Pihlaja | Sony | 29 % | 13 % | 8 % |
| Paul Elias | Universal | 26 % | 10 % | 4 % |
| Costi | PME | 26 % | 7 % | 3 % |
| Pehmoaino | Sony | 23 % | 11 % | 6 % |
| KUUMAA | Universal | 18 % | 7 % | 4 % |
| ANI | Etenee/Warner | 18 % | 6 % | 3 % |
| Arppa | Johanna/Universal | 18 % | 6 % | 3 % |
| Lauri Haav | PME | 17 % | 8 % | 4 % |
| Ege Zulu | PME | 15 % | 7 % | 4 % |
| Fabe | Epic/Sony | 13 % | 6 % | 3 % |
| AHTI | Monsp/Warner | 13 % | 5 % | 3 % |
| Averagekidluke | Warner | 11 % | 4 % | 2 % |
| Rosa Coste | PME | 9 % | 3 % | 1 % |
| Madboiali | Babyface/Warner | 6 % | 3 % | 1 % |
| Handshaking | PME | 5 % | 2 % | 1 % |

Even though all the artists are quite new, there are big differences between the artists on the list in how long they have been working for their career.

Awareness of new artists, ages 13-75 and 13-18

| Artist | Label | Knows by name 13-75 yrs | Knows by name 13-18 yrs |
|----------------|-------------------|-------------------------|-------------------------|
| BESS | Universal | 65 % | 76 % |
| Viivi | Capitol/Universal | 43 % | 62 % |
| Olli Halonen | Mökkitie/Warner | 42 % | 52 % |
| william | M Eazy/Sony | 42 % | 66 % |
| Yeboyah | Abenayo/Sony | 41 % | 50 % |
| Pihlaja | Sony | 29 % | 47 % |
| Paul Elias | Universal | 26 % | 39 % |
| Costi | PME | 26 % | 43 % |
| Pehmoaino | Sony | 23 % | 57 % |
| KUUMAA | Universal | 18 % | 35 % |
| ANI | Etenee/Warner | 18 % | 46 % |
| Arppa | Johanna/Universal | 18 % | 31 % |
| Lauri Haav | PME | 17 % | 38 % |
| Ege Zulu | PME | 15 % | 39 % |
| Fabe | Epic/Sony | 13 % | 35 % |
| AHTI | Monsp/Warner | 13 % | 34 % |
| Averagekidluke | Warner | 11 % | 32 % |
| Rosa Coste | PME | 9 % | 24 % |
| Madboiali | Babyface/Warner | 6 % | 26 % |
| Handshaking | PME | 5 % | 21 % |

Awareness of all new artists increases considerably among respondents aged 13–18.

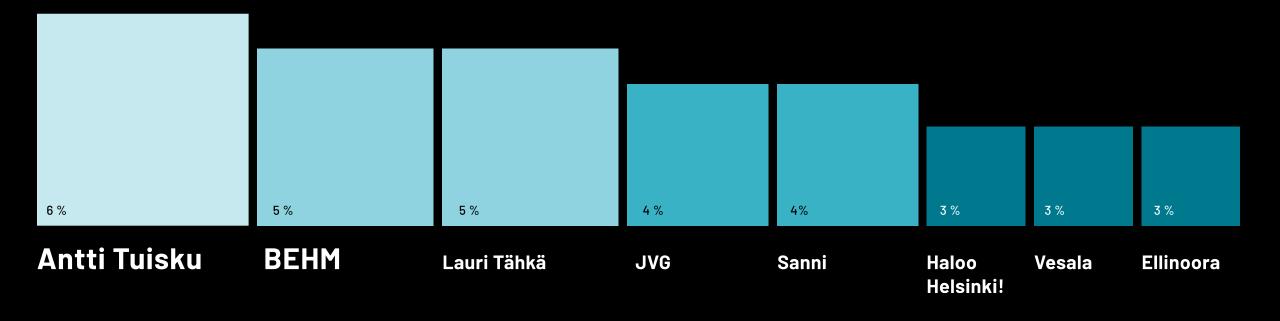


We used a series of spontaneous (open-ended) questions to ask about respondents' most favourite artists in different genres

- Finnish pop
- Finnish rock
- Finnish rap/hip hop
- Schlager
- English-language pop
- English-language rock
- English-language rap/hip hop
- Metal/hard rock

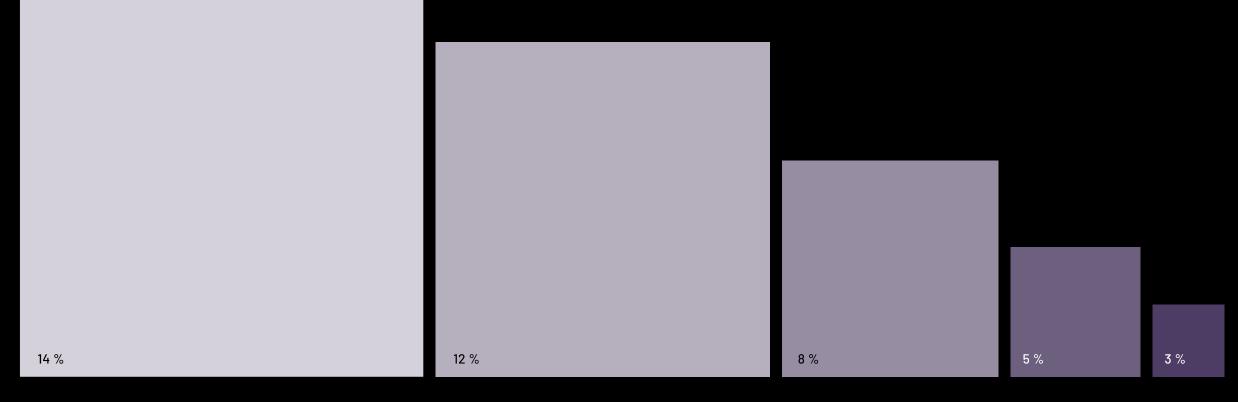
THE MOST POPULAR ARTISTS: FINNISH-LANGUAGE CHART POP

The most listened-to genre. The most even category, widely scattered.



THE MOST POPULAR ARTISTS: FINNISH RAP & HIP HOP

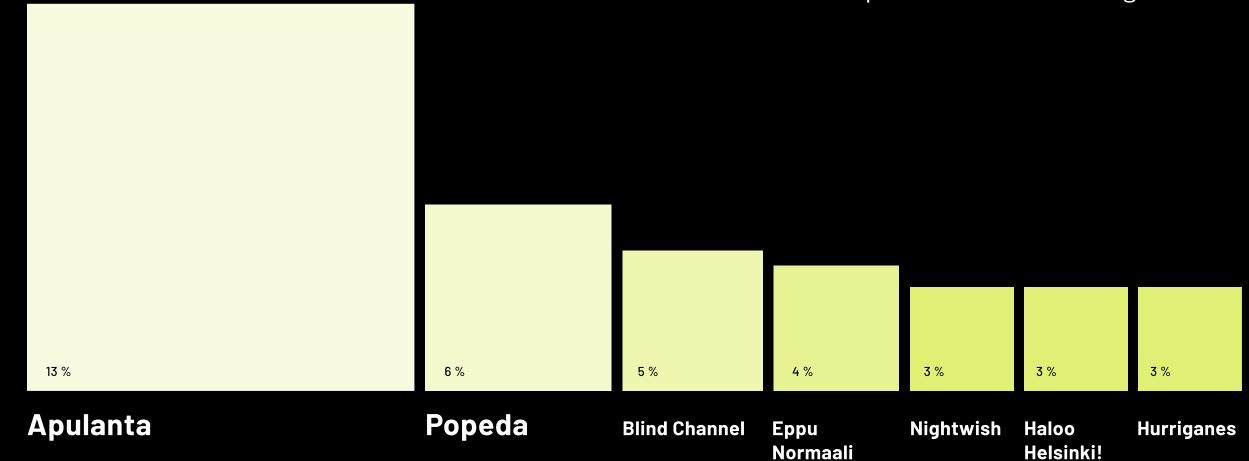
Pop-leaning popular favourites at the top.



Elastinen JVG Cheek Gettomasa Pyhimys

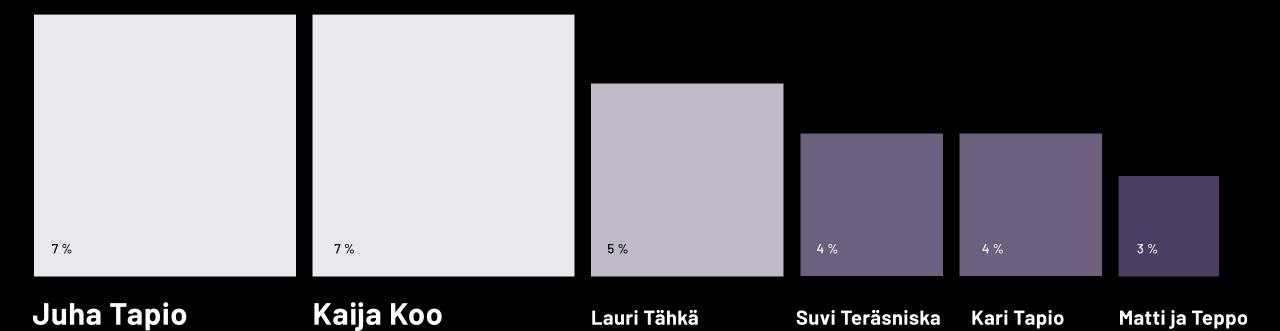
THE MOST POPULAR ARTISTS: FINNISH ROCK

Many older groups/artists compared to the other categories.



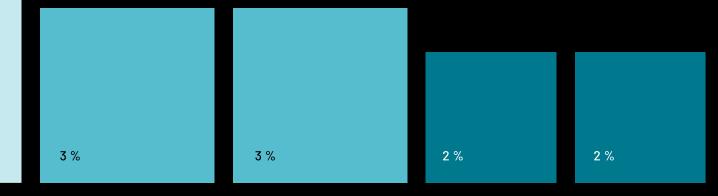
THE MOST POPULAR ARTISTS: SCHALGER

Very widely scattered.



THE MOST POPULAR ARTISTS: ENGLISH-LANGUAGE CHART POP

Ed Sheeran was mentioned the most often.



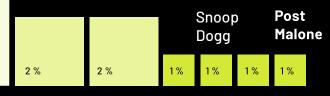
Ed Sheeran Harry Styles Adele Justin Bieber Madonna

9 %

THE MOST POPULAR ARTISTS: ENGLISH-LANGUAGE RAP & HIP HOP

Eminem ranked far above the rest.

Over-55s are only very occasionally aware of artists.



20 %

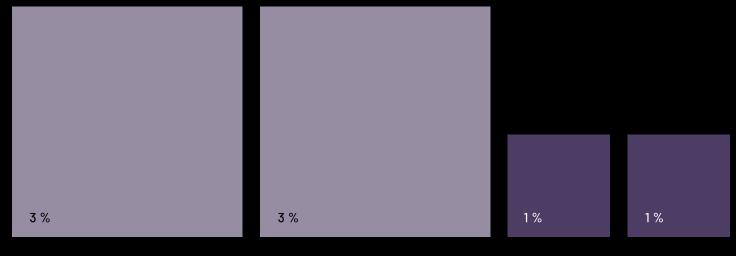
Eminem

50 cent

Kanye West Doja Cat Nicki Minaj

THE MOST POPULAR ARTISTS: ENGLISH-LANGUAGE ROCK

The oldest artists compared to other categories.



Queen

6 %

AC/DC

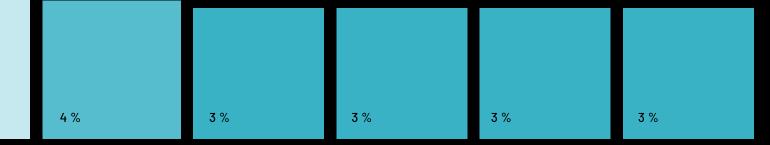
Elvis Presley

Nightwish

Iron Maiden

THE MOST POPULAR ARTISTS: METAL / HARD ROCK

Metallica dominates, and after that the list is even and long.



Metallica Rammstein AC/DC Nightwish Lordi Slipknot

13 %

Even though awareness of new artists spreads mostly among 13–25-year-olds, the all-time favourites are surprisingly similar across age groups.

The biggest names stand out.

Spontaneous favourites by category and age group The biggest artists dominate their genres across age groups

| Genre | All respondents | 13-25 yrs | 26-55 yrs | 56-75 yrs |
|-------------------------------|-------------------|-------------------|-------------------|-------------|
| Suomenkielinen pop | Antti Tuisku | JVG | Antti Tuisku | Lauri Tähkä |
| | BEHM | Antti Tuisku | BEHM | Juha Tapio |
| Suomenkielinen rock | Apulanta | Apulanta | Apulanta | Popeda |
| | Popeda | Blind Channel | Popeda | Hurriganes |
| Suomenkielinen rap/hiphop | Elastinen | JVG | Elastinen | Elastinen |
| | JVG | Elastinen | JVG | JVG |
| Iskelmä | Juha Tapio | Kaija Koo | Juha Tapio | Juha Tapio |
| | Kaija Koo | Juha Tapio | Kaija Koo | Kari Tapio |
| Englanninkielinen pop | Ed Sheeran | Ed Sheeran | Ed Sheeran | Beatles |
| | Adele | Harry Styles | Adele | Adele |
| Englanninkielinen rock | Queen | Queen | Queen | Queen |
| | Elvis & AC/DC | Metallica | Metallica | Elvis |
| Englanninnkielinen rap/hiphop | Eminem 50 Cent | Eminem 50 Cent | Eminem 50 Cent | Eminem |
| Metalli/hard rock | Metallica | Metallica | Metallica | Metallica |
| | Rammstein | Nightwish | Rammstein | AC/DC |

The home stretch

PART 5: On the sociological beauty of chart music

What does today's chart music sound like? Under-30s

- Fast-paced
- Exciting, fun
- Pop that sounds quite uniform, with a bit of rap and rock thrown in
- Easy, having clever lyrics is important

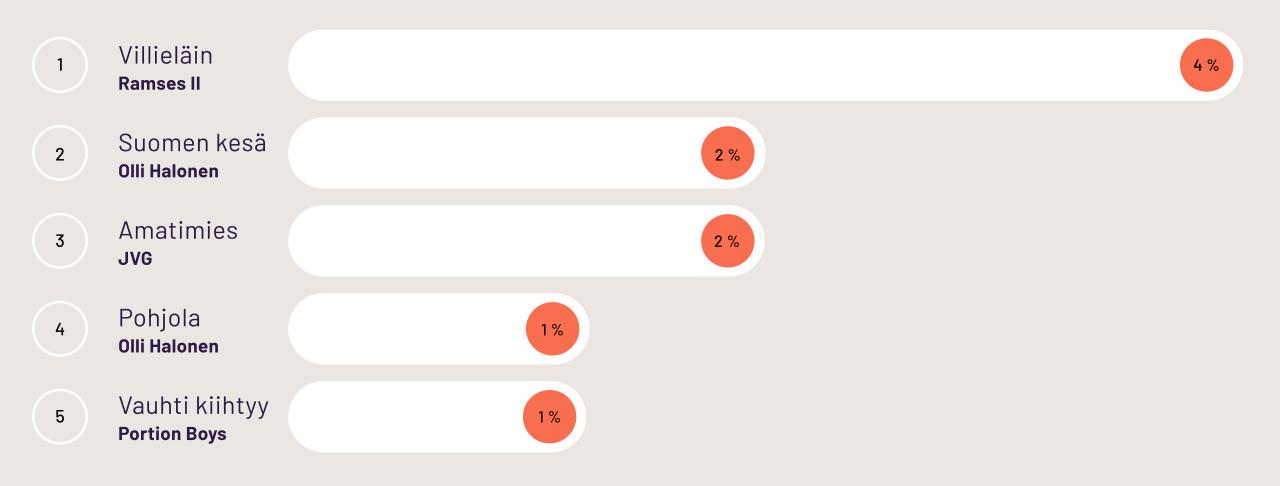
Under-30s generally have a carefree and very positive attitude towards chart pop.

What does today's chart music sound like? Over-30s

- Overproduced
- Fast-paced
- Targeted at young people
- Forgettable
- Many Finnish songs, sounds somewhat schlager-like
- Crap

At about 30 years of age, there is a fairly hard line in terms of attitudes towards chart pop: first, attitudes become negative and after 60 years of age people feel very distant from chart pop.

SUMMER 2022 FAVOURITE SONG



Four very psychologically distinct periods in everyday behaviour in 2022

January:

COVID-19 month

February-April:

Ukraine – quickly applying for NATO membership, worries about national security, patriotism. A period of Finnishness and unanimity.

May-July:

Restaurants, travel, events, increasing worry about prices.

August:

Waking up to the energy crisis, reorientation.

People are supported by the feeling of being tired of adversity: Finns still have quite a positive attitude towards difficulties. If there is trouble, people seek safety from unanimity.



In 2022, the Western cultural zeitgeist is dominated by:

- Adapting to changes
- 2. A slightly desperate desire to have more control over one's own life across Gen X, Y and Z.

The great conflict:

The use of one's own free will is completely random. Most of people's everyday life is free of hard choices, a stream that people navigate on autopilot according to their and others' expectations of themselves.

The lesson:

If you want to understand what is actually happening in Finland and what people are thinking, keep track of the lyrics of the biggest hits.

2022 in music - developments and trends

- In summer 2022, Finns attended concerts more than ever before despite their decreasing purchasing power in order to reduce the experience deficit caused by the COVID-19 pandemic.
- Pop finally surpassed rock as the most popular genre in live music.
- Schlager, the third giant, is keeping up with the times while dominating among over-60s.
- Short videos' explosive growth in popularity and rapidly increasing importance in the creation of new hits has been the biggest new development in the last couple of years.
- One in three among under-18s create short video content every week.

2022 in music - artists

- The advance of new hit artists is speeding up, but megastars that break through in all age groups stand out even more.
- Yeboyah, Pihlaja and Pehmoaino are examples of artists who are currently known by more than half of under-25s, but whose breakthrough with older age groups is yet to come. BESS, who used the Eurovision Song Contest as a fast track, is the new artist who has increased her popularity the fastest this year, followed by Viivi and Olli Halonen.
- Antti Tuisku, BEHM, (pop), JVG, Elastinen (hip hop) Apulanta, Popeda (rock), Juha Tapio and Kaija Koo are the top Finnish artists in their genres according to the general public.
- The most popular artists that perform English-language music are Ed Sheeran, Adele (pop), Eminem, 50 Cent (hip hop), Queen, Elvis, AC/DC (rock), as well as Metallica and Rammstein (metal/hard rock).

2022 in music - devices

- According to their own estimate, Finns listen to music for about 1 hour and 45 minutes every day.
- The use of phones as a listening device and the growth in popularity of Spotify and similar streaming services have levelled off for now. It will be interesting to see how radio stations are going to increase radio listening through phones and computers from the current share of about 10%.
- Radio stations and digital music services (Spotify, YouTube, social media) are very evenly matched sources of music listening. Digital devices are more popular among younger listeners and for focused listening. Radio has a strong position when it comes to more relaxed background music listening.
- The both have their place.

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