

Polaris Nordic Digital Music in the Nordics

May 2024

Conducted by Tono, Teosto and Koda

Living Consumer Intelligence | business.yougov.com

YouGov®

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Background & Methodology

Background & Methodology



Background and purpose

Polaris Nordic (a collaboration between the three collecting organizations (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, 2018, 2020 and 2022.

This report covers the following topics:

- The market for digital music services
- Artificial intelligence and music creation
- TV / movie streaming



Data collection period

The survey consists of data from the four Nordic countries and was collected from 8th to 22nd of May 2024.



Target group and sample size

The survey was carried out as a sample among a national representative sample on gender, region, and age (12-65 years old) in Denmark, Norway, Sweden and Finland. The survey was conducted online in the YouGov panels with a total of 4000 interviews.



Weighting of data

Data is weighted on the dimensions gender, age and geography based on an ideal from local statistical agencies in the countries, so that the results are representative of the population in each country.



Publication of results

On any publication of the results of the survey, YouGov must be stated clearly as the source.

Prior to the publication of the results of the survey, YouGov must have the opportunity to approve the press release or other use of the results. The purpose is solely to ensure that we can vouch for the use of the results in technical analysis terms.

A hand is shown in a dark, futuristic environment, hovering over a glowing control panel. The panel features several buttons and lights, with a prominent red ring of light. The overall scene is illuminated with blue and purple light, creating a high-tech, digital atmosphere.

Key Findings

Key Findings



Streaming of Music

YouGov

- 95% of the people in the Nordics aged 12-65 use digital music streaming services.
- On average, they spend 3,6 hours per day listening to digital music.
- 55% pay for at least one streaming service, while 40% of the Nordic people only use free music streaming services.
- YouTube and Spotify are the most used streaming services, each catering to about 2 out of 3 people.
- Spotify (paid versions) has the largest daily average listening time with 2,1 hours per paid user, which correspond to 34% of all listening time among Nordic music streamers.
- Main source of new music numbers is still radio, but the impact of the channel is decreasing and has been for many years. Young people rarely find new music through radio instead they learn about new music from TikTok or via friends.
- People generally listen to their own playlists or listen to music tracks or albums they have found themselves
- 69% consider it easy to find music from their own country on streaming services.



AI and Music Creation

- 20% of the people in the Nordics use AI in their everyday life. Most in Norway (26%) and least in Finland (15%).
- 58% think that music created by artificial intelligence, without human creativity, should be labeled "AI" in streaming services so it is possible to know what is made by "robots" and what is made by humans. 19% disagree to that.
- 69% think artists and music creators should be asked for permission and paid if an AI company uses their voice or songs in new music created using AI technology. 11% do not think that.
- When asked about one's standpoint on AI and music creation, 64% across the Nordics state that music should be created by humans or at least involve humans to some extent. 16% state that music creation does not have to involve humans. Results are similar across the four Nordic countries.



TV/Movie Streaming

- 89% of the people in the Nordics aged 12-65 use TV / movie content streaming services.
- On average, they spend 3,1 hours per day streaming TV / movie content.
- Across the Nordics, 52% stream content on Netflix which is by far the largest streaming service. Second and third are Disney+ and HBO Max with 27% of the Nordic users.
- Netflix is competing strongly with the local public digital service providers in all the four markets and have lost slightly since 2022.
- While commercial streaming is only increasing slightly these days, streaming of public service channels is seeing great increases, though still on a lower level compared to commercial services.
- Netflix has the largest daily average streaming time with 1,5 hours per user, which correspond to 24% of all TV streaming time among Nordic TV / movie content streamers.

Streaming of Music

- **Relevant changes from 2022 to 2024:**
- More people in the Nordics stream music in 2024 (95%) compared to 2022 (91%). Especially Denmark has increased greatly over the past two years, from 88% to 94%, but all Nordic countries show increases.
- The increase is seen both among paid streamer as well as streamers of free music, and though Finland has had fewer paid streamers historically, this trend is also changing so more Finns now stream paid music (41% in 2024 compared to 34% in 2022), closing in on the other Nordic countries.
- On average, Nordic music streamers spend 3,6 hours per day listening to digital music, least in Denmark (3,1 hour per day) and highest in Sweden (4,0 hours per day). The Nordic average has changed from 3,2 hours per day in 2022 to now 3,6 hours in 2024). Finns spend significantly more time listening to digital music now compared to two years ago (3,5 hours per day in 2024 and 2,7 hours in 2022).
- YouTube (67%) and Spotify (62%) are now almost similar in size of users, which is a change from 2022. Spotify now has 4%-points more users compared to 2022, while YouTube has lost 3% points in the same period.
- Spotify (paid versions) has the largest daily average listening time with 2,1 hours per paid user (up from 1,7 hours in 2022), which correspond to 34% of all listening time among Nordic music streamers (up from 24% in 2022).

TV/movie Streaming

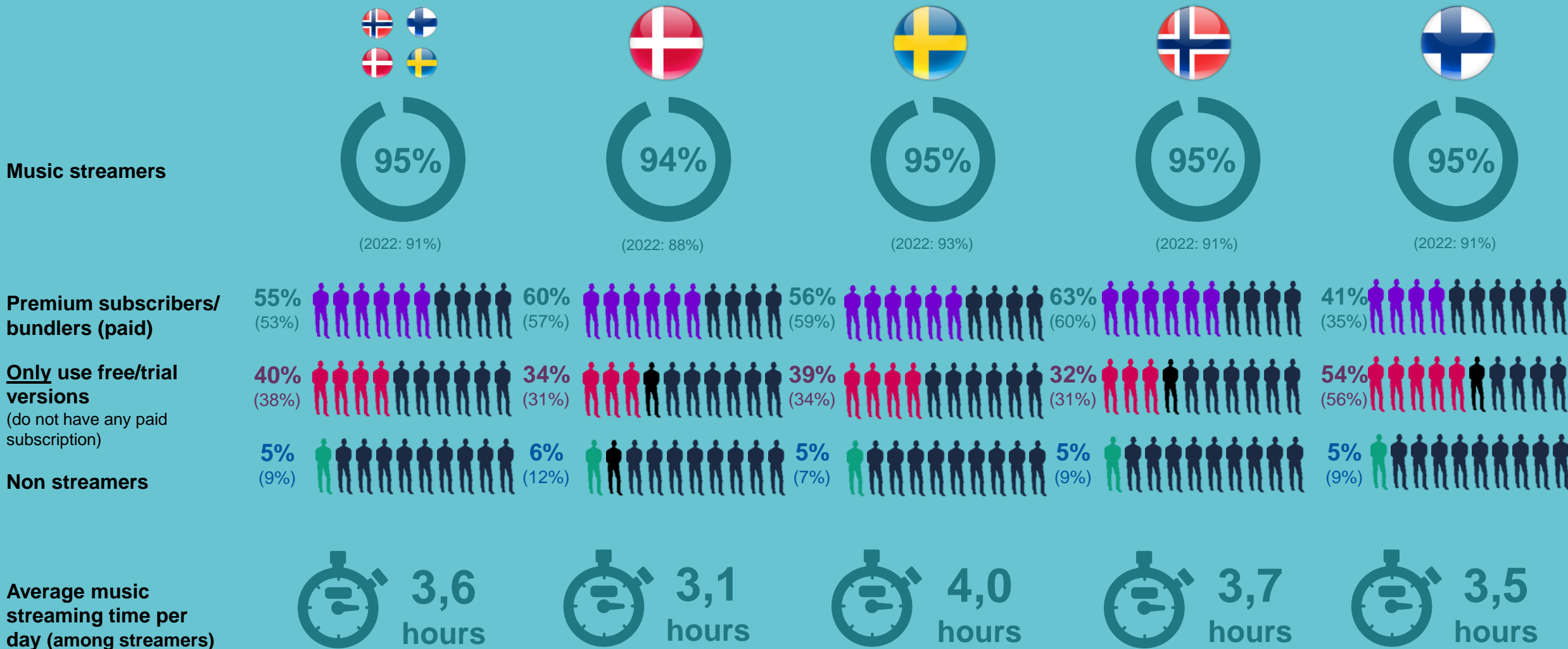
- **Relevant changes from 2022 to 2024:**
- 89% of the people in the Nordics use TV / movie content streaming services, which is an increase from 87% in 2022. The increase is mainly seen in digital streaming of public TV and movie content, with 51% who uses streaming of public TV channels in 2024, where 45% of the Nordic people used it in 2022. The increase is largest in Denmark and Finland.
- On average, people spend 3,1 hours per day streaming TV / movie content, which is a decrease from 3,8 hours per day in 2022.
- Across the Nordics, Netflix is still by far the largest streaming player on the market, but they have lost momentum since 2022, with 52% users in 2024 compared to 57% users in 2022. The decrease is seen in all four Nordic countries. Increased competition is especially coming from both public TV provider and TV2 Play as well as Disney+ and Amazon Prime.
- Netflix has the largest daily average streaming time with 1,5 hours per user (up from 1,3 hours in 2022), while most other large commercial streaming services remain more or less unchanged in daily time spend on the service since 2022. Viaplay has though also managed to increase the daily average time spent on their service from 1,0 hour per day in 2022 to 1,2 hours in 2024.
- Netflix has managed to increase their 'market share' of time spent among commercial streaming services from 26% in 2022 to 28% in 2024.



Streaming of Music

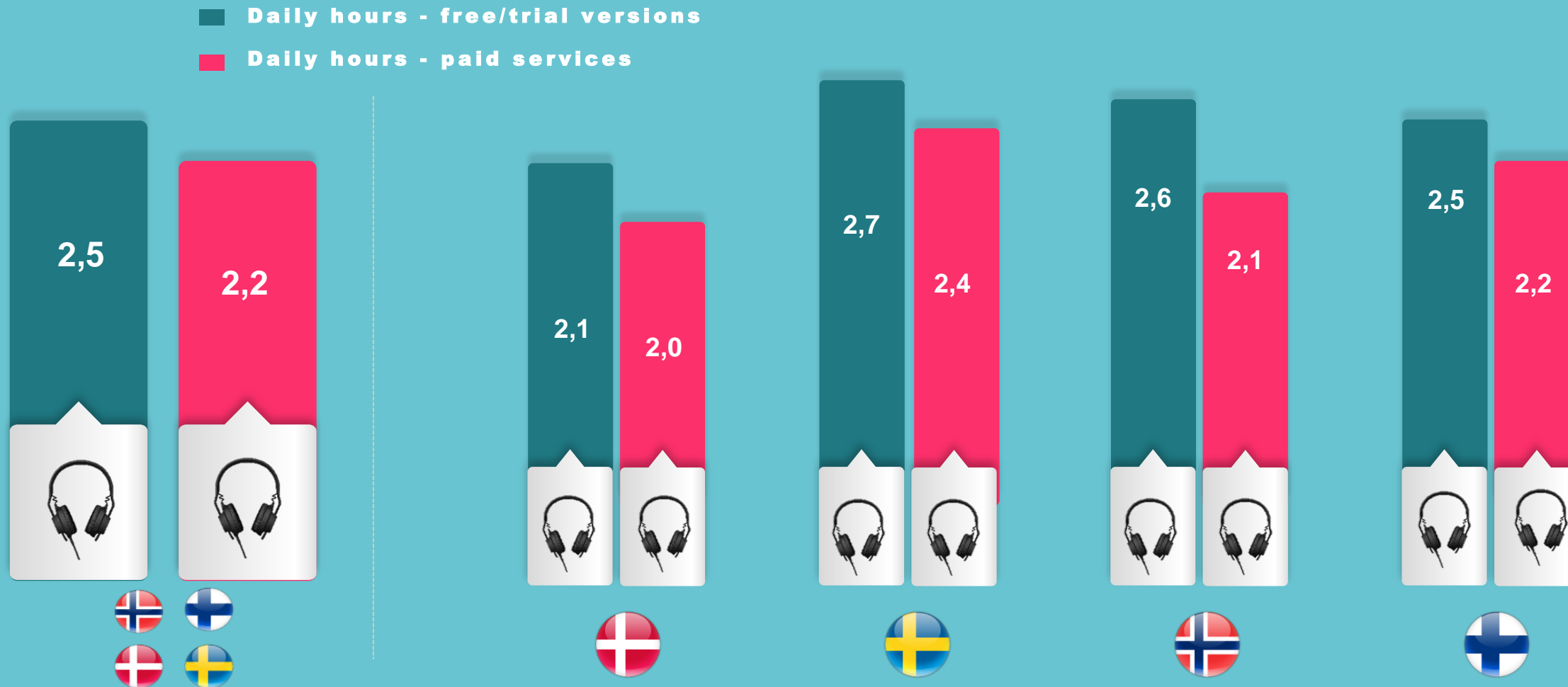
Music consumption – Nordic and countries

Across the Nordics, 95% stream digital music which is an increase in using music streaming service since 2022. On average, people in the Nordics spend 3,6 hours a day listening to digital music.



Daily hours used on paid and free audio streaming services – Nordic and countries

Daily 0,3 more hours are spent on free streaming compared to paid versions measured per music listener. Danes spend less hours on both paid and free music streaming compared to the other countries, whereas Swedes spend the most.

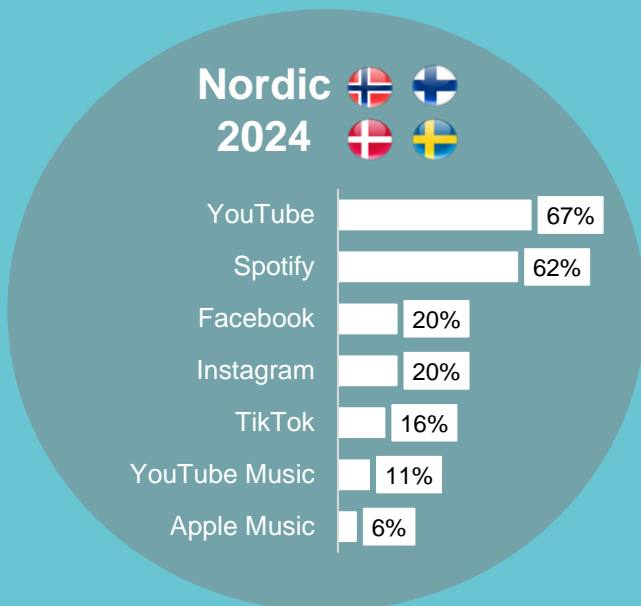
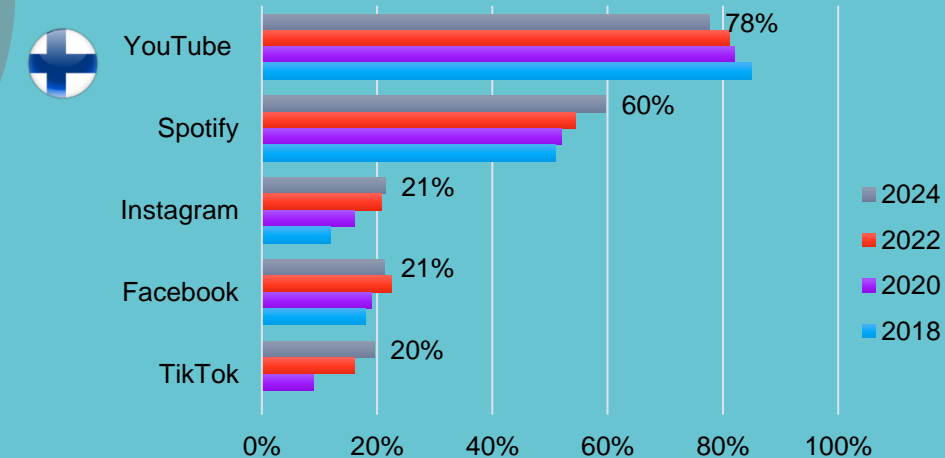
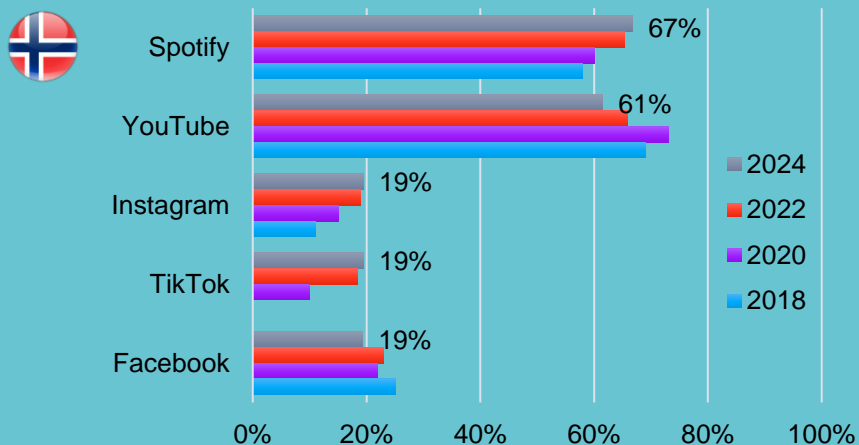
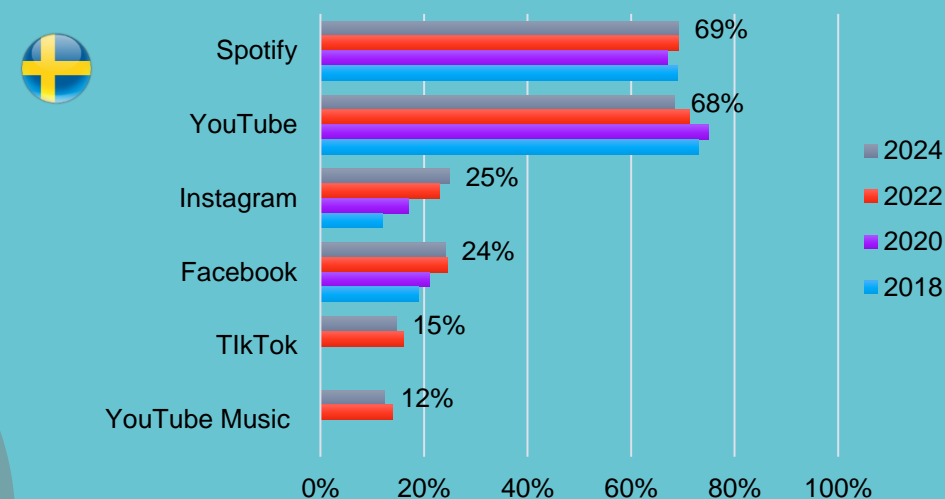
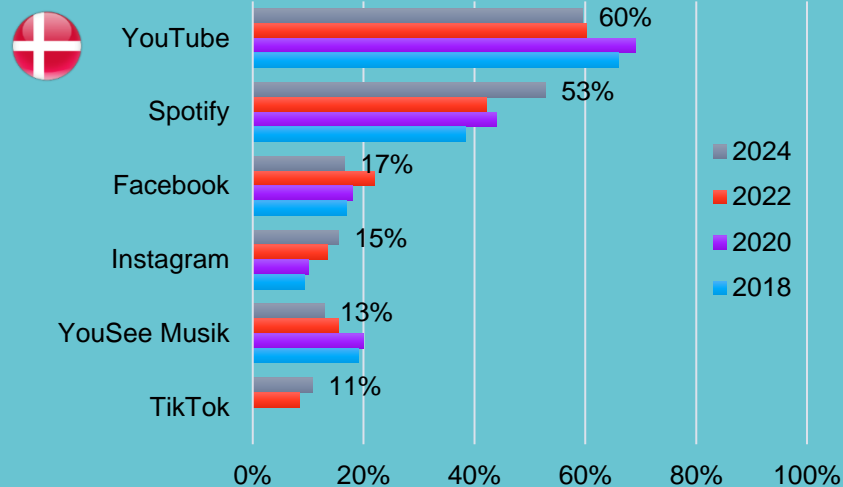


Time spent includes all paid and free / trial digital audio streaming services incl. social media

Remark: Bases for free/trial versions also include the use of free music from people using both paid and free music services

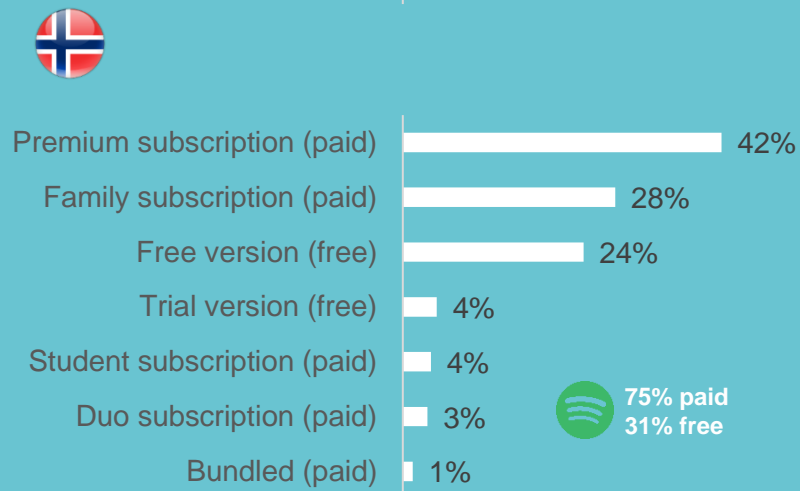
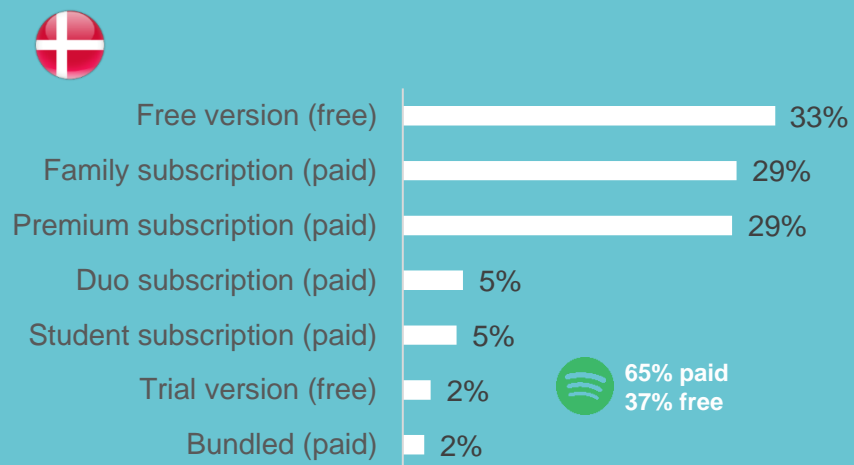
Top audio and video services used for streaming of music – Nordic and countries

Across all four Nordic countries, YouTube is the most used digital music service for music but Spotify is now being a serious competitor to the most used musical service in the Nordics. TikTok and Instagram are closing in on Facebook.

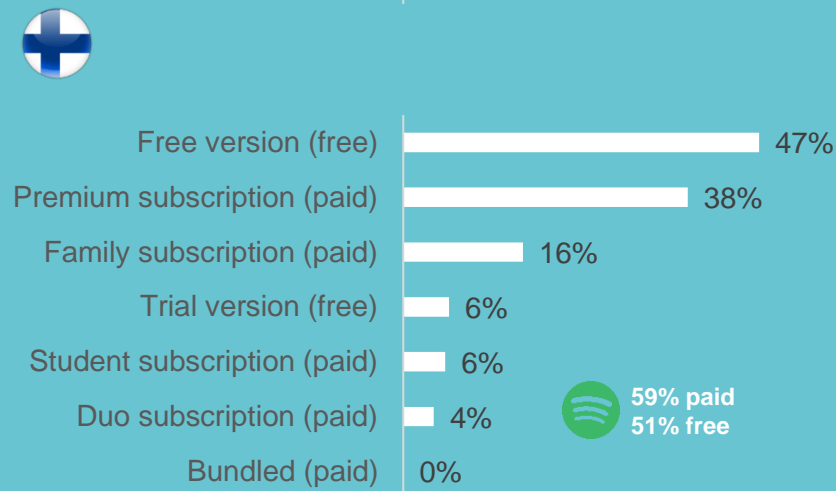
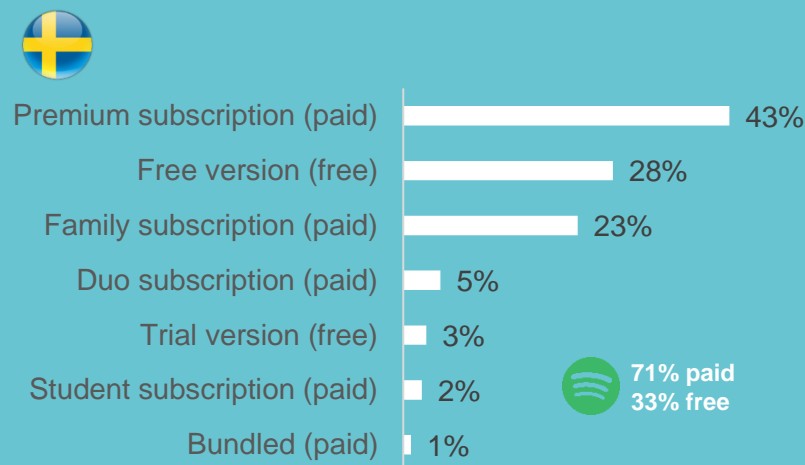
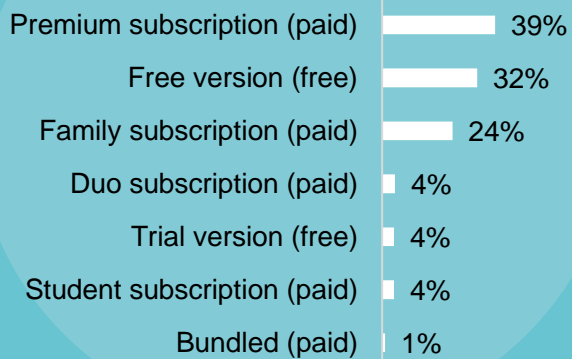


Version of Spotify used in the past 12 months – Nordic and countries

The Premium version of Spotify is the most used version in the Nordics but many also use the free version or the family subscription. In Denmark and Finland most people use the free version, while more Swedes and Norwegians use the Premium paid version. Just 1% across the Nordics have a bundled subscription.



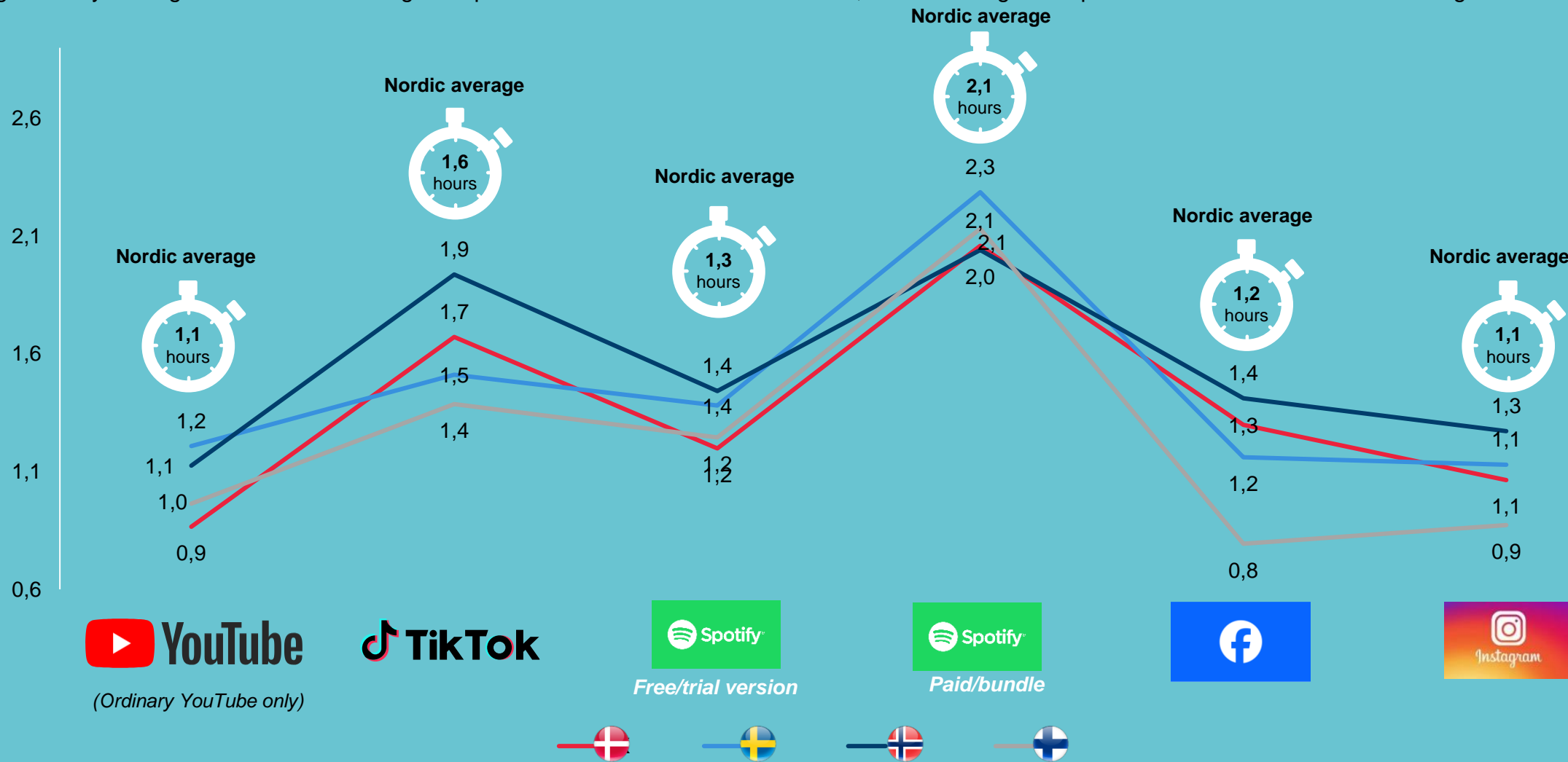
Nordic 2024



Spotify usage
 Note! The question is a multiple-choice question, so the total percentages sums to more than 100%

Daily time spend on the top audio and video streaming of music – Nordic and countries

The Premium version of Spotify is taking most listening time among the Nordic people and with similar average time in each country. TikTok is second but with a larger variety among the countries. Norwegians spend more time on TikTok than Finns, which is the general picture for almost all music streaming services.

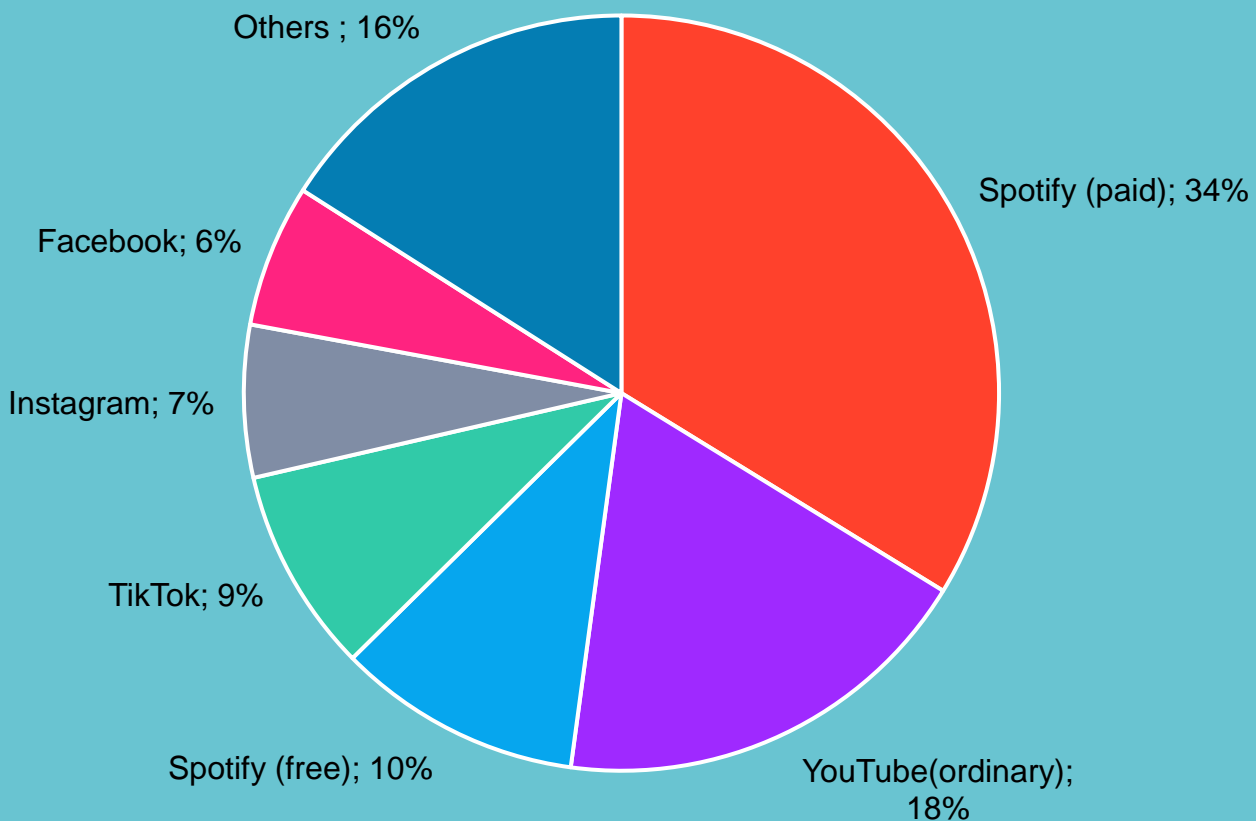


How much time do you spend per day listening to music or watching music videos on the following digital services?
 Base: Use digital service to listen to music

Daily time spend on the top audio and video streaming of music – Nordic overview

Across the Nordics, Spotify accounts for almost half (44%) of all time spent on daily music streaming. The ordinary YouTube (free) takes almost a fifth (18%) and comes in second.

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



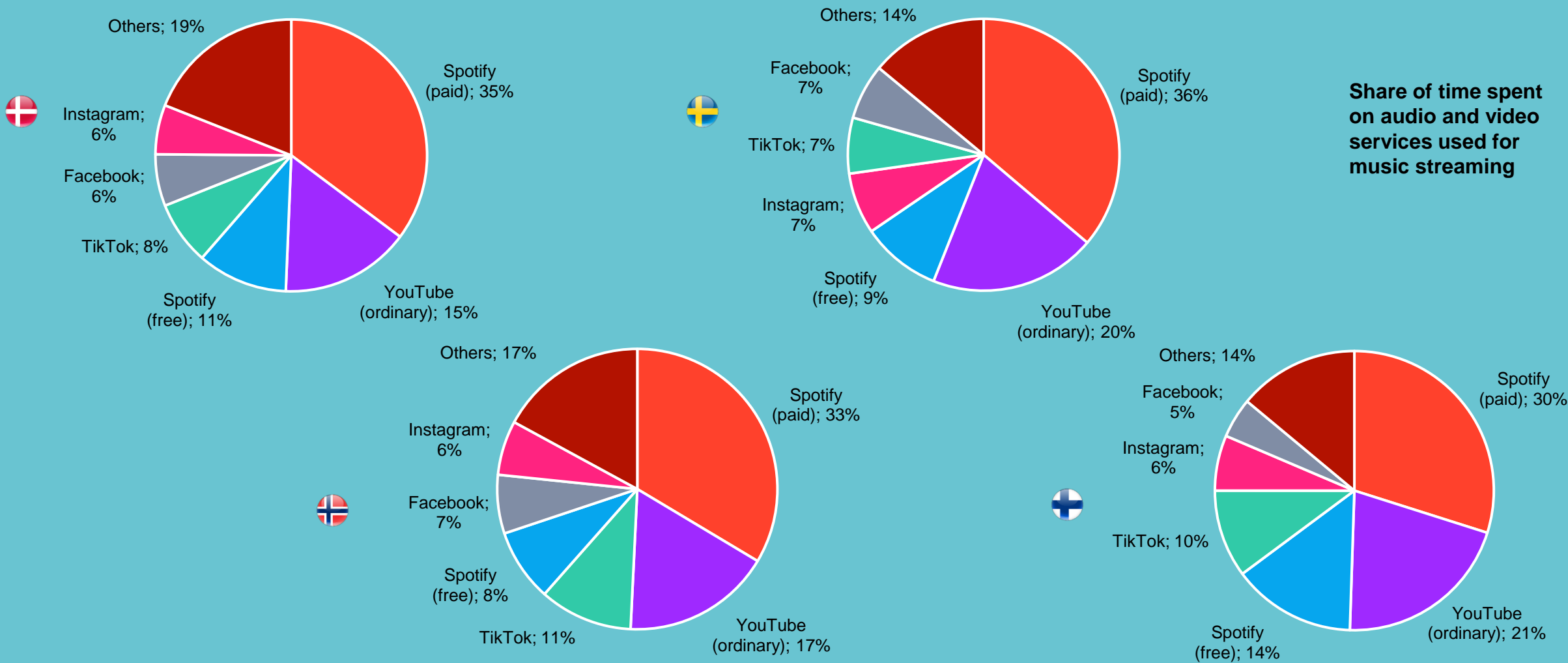
Share of time used on paid vs. free music streaming:



Remark: Bases for free/trial versions also include the use of free music from people using both paid and free music services

Daily time spend on the top audio and video streaming of music – Nordic countries

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



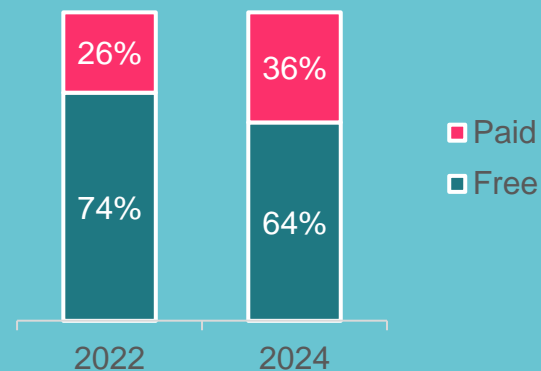
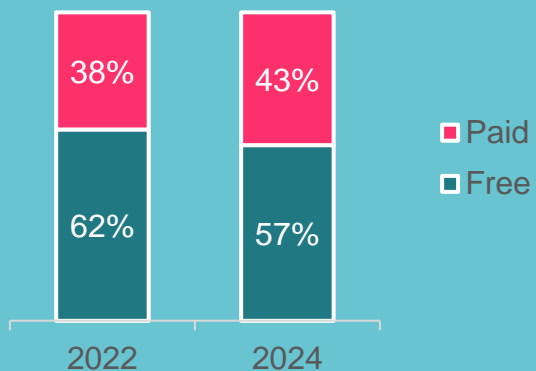
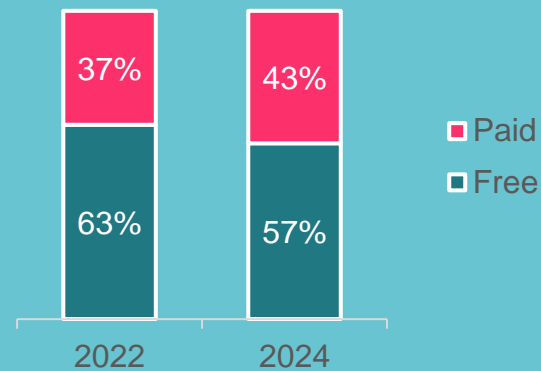
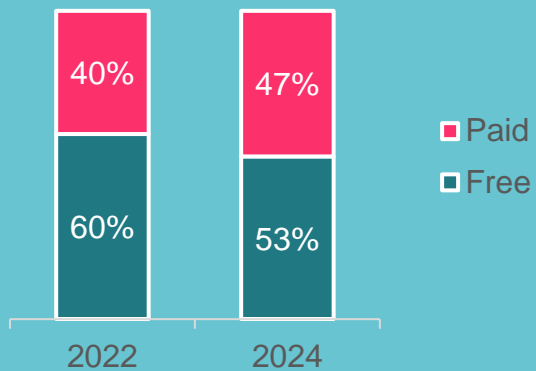
How much time do you spend per day listening to music or watching music videos on the following digital services?
 Base: Use digital service to listen to music

Note: Others = All services with 5% or below share of daily time spend

Share of daily time spent on paid and free streaming of music – Nordic countries

Across the Nordics time spent on paid music streaming has been increasing greatly since 2022. Paid music's share of time spent is the largest among the Nordic countries, and least in Finland. But all four countries has increased the time spent on paid music, relatively.

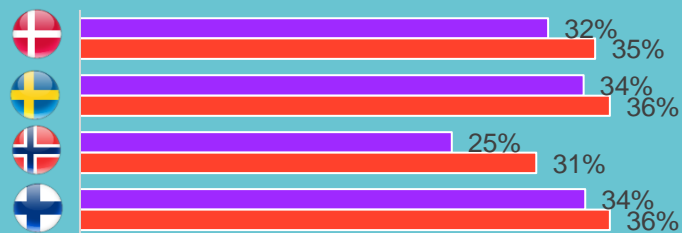
Share of time used on paid vs. free music streaming



Reasons to not subscribing to a music streaming service – Nordic countries

Across the Nordics, every third person do not subscribe to a paid streaming service because it is too expensive. Another third of people listen too little to music so they don't need a paid version and further a third of people think they have so many options for streaming music for free that they don't see why they should pay.

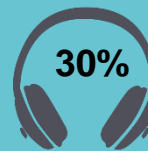
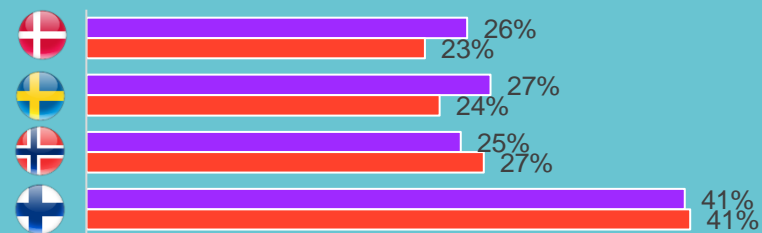
“I listen to music so little I don't need a paid version of the service”



35%

■ 2024
■ 2022

“There are many options for streaming music for free, so I don't see why I should pay”



30%

■ 2024
■ 2022

Nordic average 2024

“Paid service is too expensive”



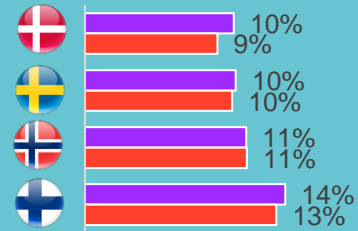
28%

■ 2024
■ 2022

Reasons to not subscribing to a music streaming service – Nordic countries

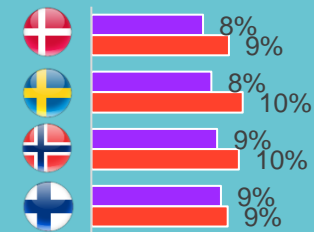
1 out of 10 think that the quality of the services are too poor to pay for, or they spend their money for music on LPs/ concerts/CDs instead. 7% use someone else's paid service to listen to music.

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




■ 2024
■ 2022

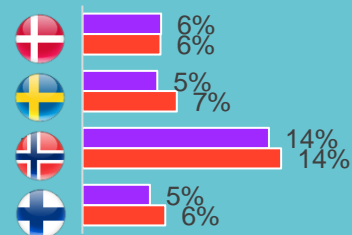
“I spend my music budget on LPs/ concerts/CDs”



■ 2024
■ 2022


Nordic average 2024

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



■ 2024
■ 2022

Channels where a new song was discovered – Nordic overview

Radio is still the main channel for discovering new songs but has dropped significantly over the years in importance. TikTok and Instagram have increased while Facebook and YouTube remain stable.



Change over time

	2015	2017	2018	2020	2022	2024	
I heard it first on the radio	39%	37%	36%	36%	25%	23%	↓
I heard it first in a playlist or as a recommendation on a streaming service	-	-	-	13%	11%	11%	
I heard it first on YouTube	10%	12%	11%	13%	11%	11%	
I discovered the song via TikTok	-	-	-	-	6%	9%	↑
A friend played the song	11%	9%	11%	10%	9%	8%	↓
I first heard it in a TV series/in a movie	6%	7%	6%	8%	6%	6%	
I discovered the song via Instagram	-	-	-	-	3%	4%	
I heard it first at a concert	2%	2%	2%	2%	2%	2%	
I heard it first on some other Internet site/social media	3%	2%	2%	1%	3%	2%	
I discovered the song via Facebook	-	-	-	-	3%	2%	

“-” Indicates not previously measured in the current formulation

Channels where a new song was discovered – Nordic countries

Radio is still the main channel for discovering new songs in all countries but has dropped over the years in importance. Social media increase in importance and TikTok is increasing in all countries.



	2015	2017	2018	2020	2022	2024
I heard it first on the radio	46%	44%	45%	42%	30%	30%
A friend played the song	9%	9%	8%	12%	7%	9%
I heard it first in a playlist or as a recommendation on a streaming service	-	-	-	9%	8%	9%
I discovered the song via TikTok	-	-	-	-	4%	9%
I heard it first on YouTube	9%	9%	10%	12%	9%	8%
I discovered the song via Instagram	-	-	-	-	4%	4%
I heard it first on TV	5%	6%	4%	5%	4%	4%
I heard it first at a concert	3%	3%	3%	3%	2%	3%
I discovered the song via Facebook	-	-	-	-	3%	2%
I heard it first on some other Internet site	3%	5%	5%	2%	2%	2%



	2015	2017	2018	2020	2022	2024
I heard it first on the radio	33%	33%	31%	31%	24%	18%
I heard it first on YouTube	12%	9%	11%	13%	10%	11%
I heard it first in a playlist or as a recommendation on a streaming service	-	-	-	16%	12%	11%
A friend played the song	12%	11%	11%	9%	11%	9%
I heard it first on TV	7%	7%	6%	9%	8%	7%
I discovered the song via TikTok	-	-	-	-	5%	7%
I discovered the song via Instagram	-	-	-	-	4%	6%
I discovered the song via Facebook	-	-	-	-	3%	2%
I heard it first at a concert	1%	1%	2%	2%	2%	2%
I heard it first on some other Internet site	5%	5%	3%	1%	3%	2%



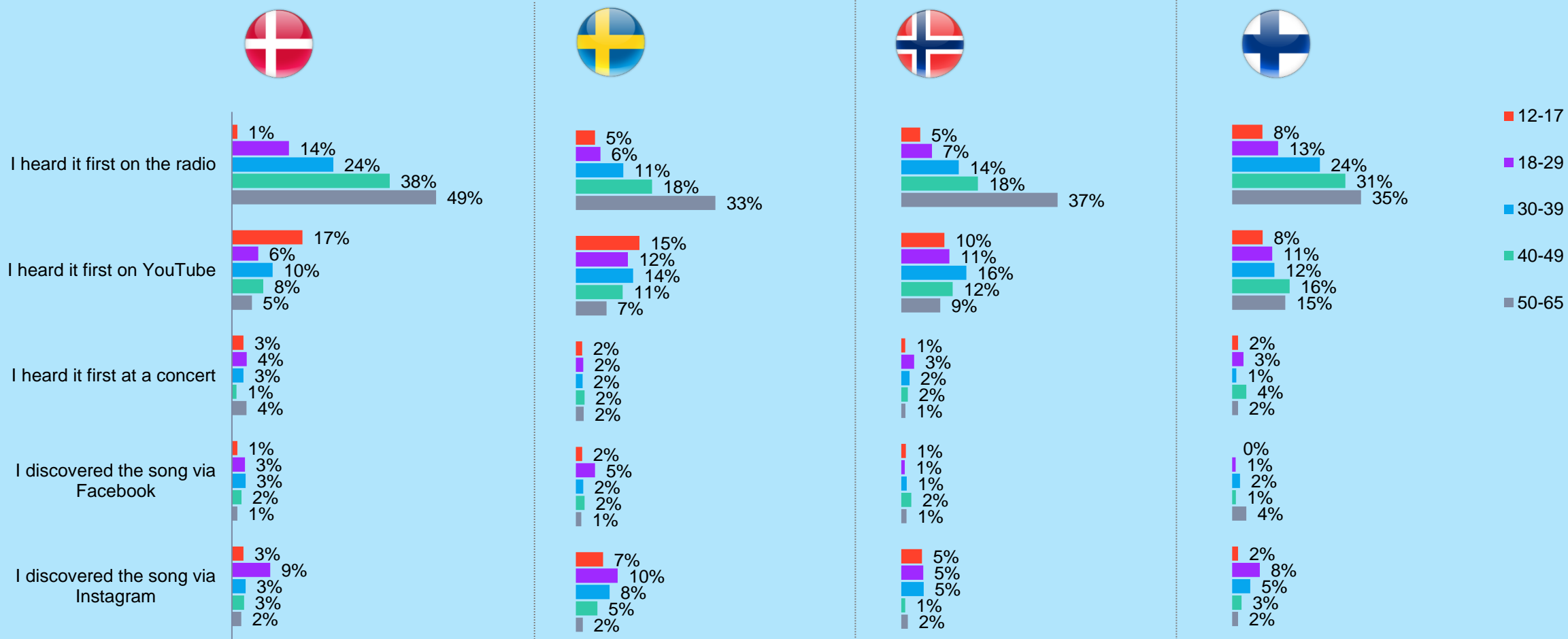
	2015	2017	2018	2020	2022	2024
I heard it first on the radio	36%	32%	30%	31%	20%	19%
I heard it first in a playlist or as a recommendation on a streaming service	-	-	-	14%	12%	13%
I heard it first on YouTube	9%	9%	12%	14%	12%	12%
I heard it first on TV	8%	7%	8%	11%	8%	9%
I discovered the song via TikTok	-	-	-	-	8%	9%
A friend played the song	10%	12%	11%	9%	8%	7%
I discovered the song via Instagram	-	-	-	-	3%	3%
I heard it first on some other Internet site	6%	7%	5%	1%	3%	3%
I heard it first at a concert	3%	3%	3%	3%	3%	2%
I discovered the song via Facebook	-	-	-	-	2%	1%



	2015	2017	2018	2020	2022	2024
I heard it first on the radio	41%	37%	37%	38%	28%	26%
I heard it first on YouTube	10%	10%	10%	15%	13%	13%
I heard it first in a playlist or as a recommendation on a streaming service	-	-	-	13%	11%	13%
I discovered the song via TikTok	-	-	-	-	7%	9%
A friend played the song	12%	15%	15%	9%	8%	7%
I heard it first on TV	5%	6%	6%	7%	5%	5%
I discovered the song via Instagram	-	11%	10%	9%	2%	4%
I heard it first at a concert	2%	2%	2%	1%	1%	2%
I discovered the song via Facebook	-	5%	5%	5%	2%	2%
I heard it first on some other Internet site	5%	5%	4%	1%	3%	2%

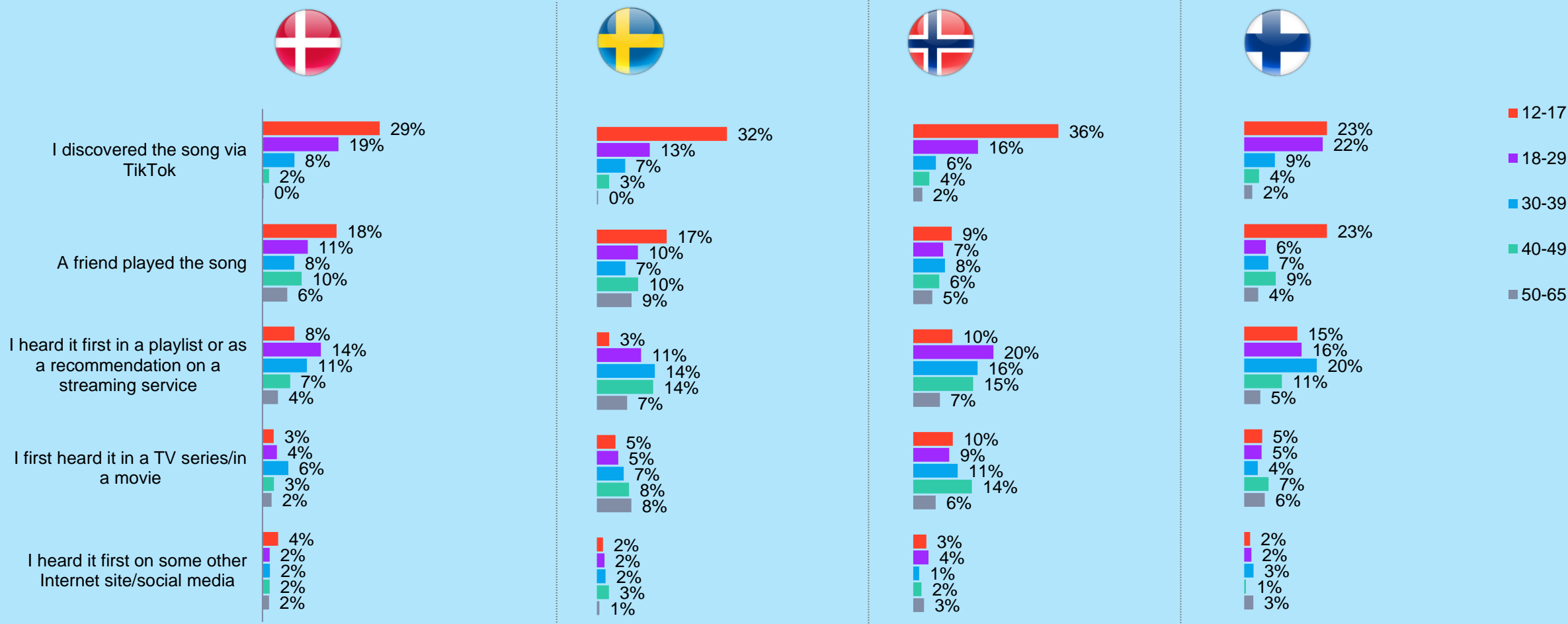
Channels where a new song was discovered – By age (1/2)

Radio is primarily used to discover new music by people above 30 years old. Young people under 18 years primarily discover new music on TikTok , YouTube and through friends.



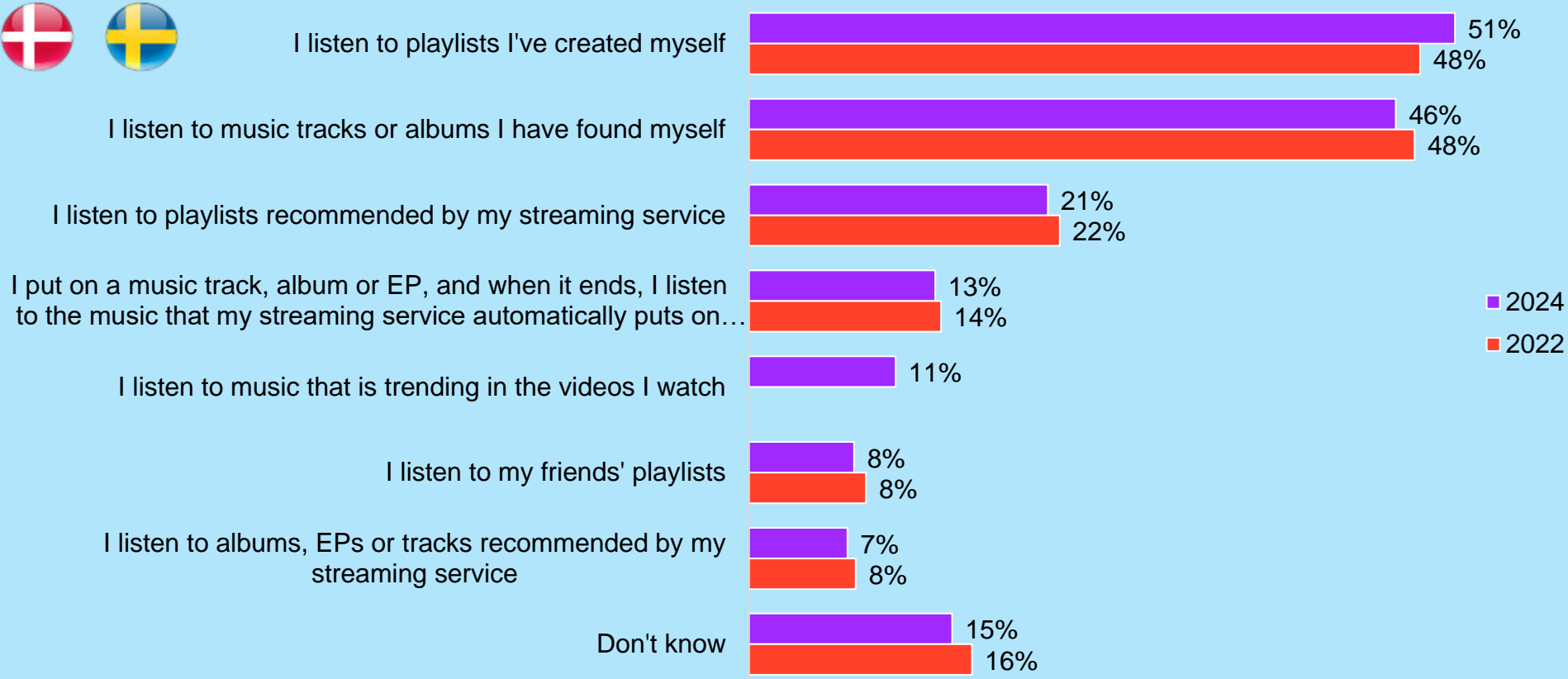
Channels where a new song was discovered – By age (2/2)

Radio is primarily used to discover new music by people above 30 years old. Young people under 18 years primarily discover new music on TikTok , YouTube and through friends.



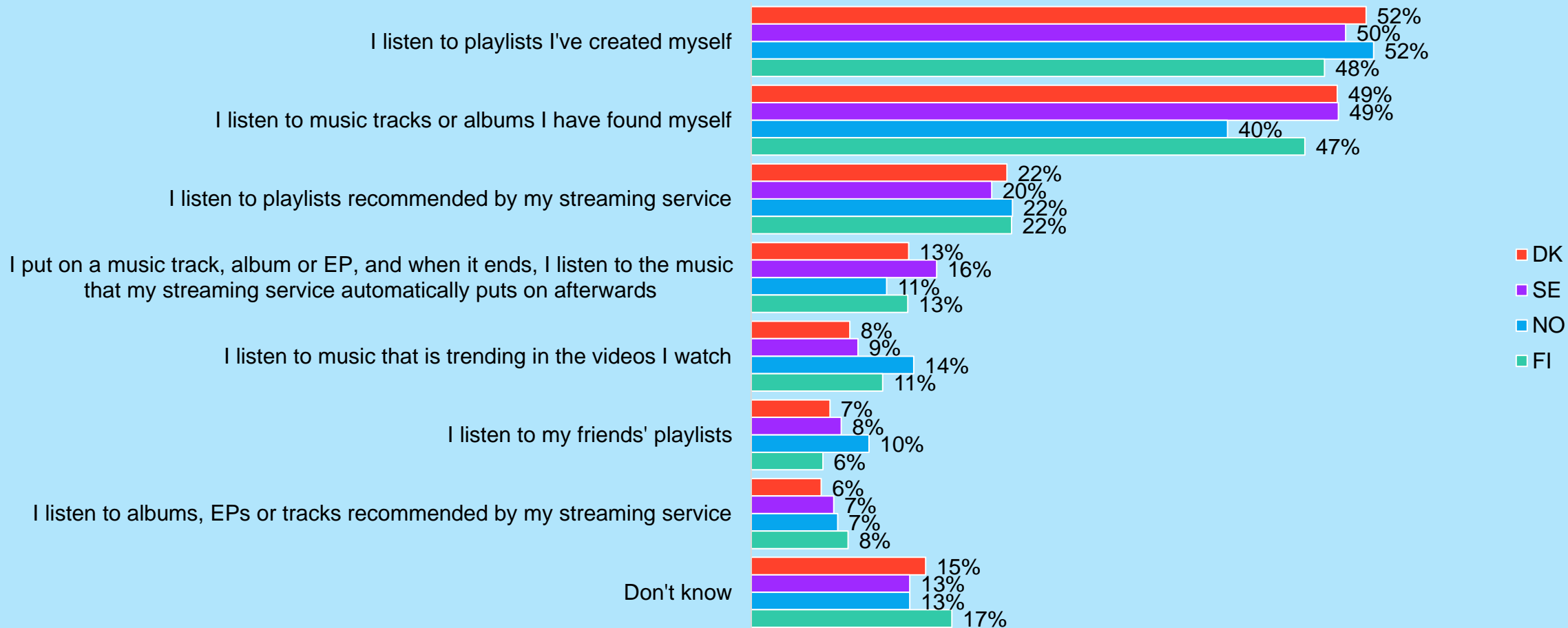
Statements describing music consumption – Nordic overview

Across the Nordics, people mostly listen to playlist or tracks they have created themselves.



Statements describing music consumption – Nordic countries

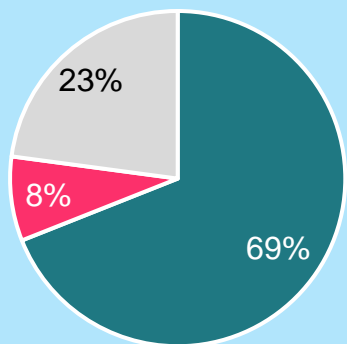
The picture is similar across the Nordic countries – most people listen to music from a playlist they have created themselves or from tracks/albums they have found. 1 in 5 listen to playlist recommendations from streaming services.



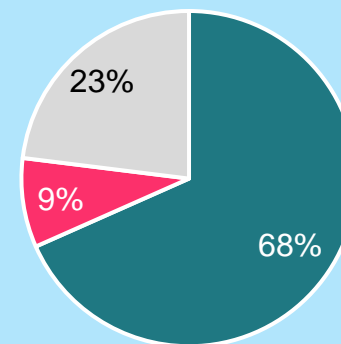
Easy to find music from own country on streaming services – Nordic countries

In all Nordic countries, 7 out of 10 state that it is easy to find music from their own country on streaming services. Just 9% on average say no, while the rest do not know.

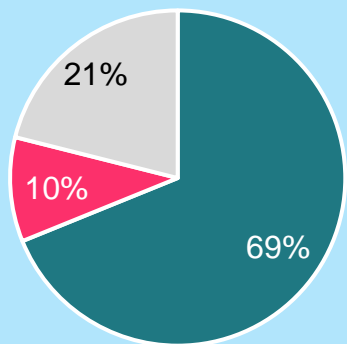
Easy to find music from own country on streaming services?



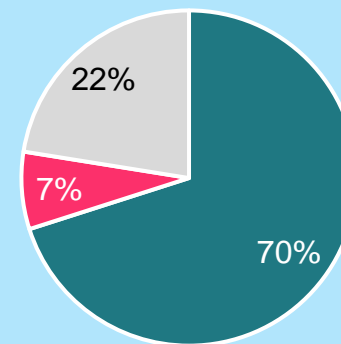
■ Yes ■ No ■ Don't know



■ Yes ■ No ■ Don't know



■ Yes ■ No ■ Don't know



■ Yes ■ No ■ Don't know

A woman's face is the central focus, overlaid with a complex digital interface. The background is a dark space filled with colorful, glowing lines of binary code (0s and 1s) in shades of blue, green, and purple. Overlaid on the woman's face and the background are various digital elements: a grid of small, colorful squares, a vertical bar chart, and snippets of code. The code includes keywords like 'elif', 'mirror', 'modifier', and 'context'. The overall aesthetic is futuristic and high-tech, representing the intersection of artificial intelligence and creative arts.

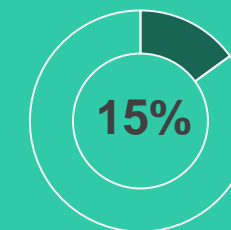
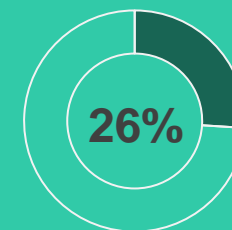
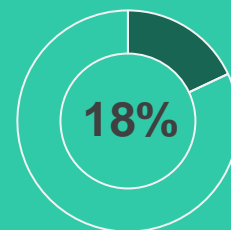
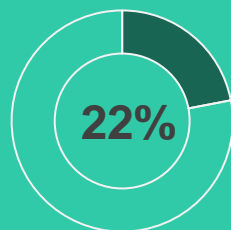
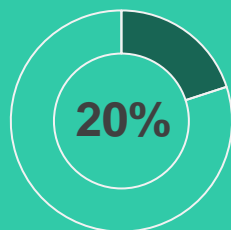
AI and Music Creation

Use of Artificial Intelligence in the everyday life – Nordic and countries

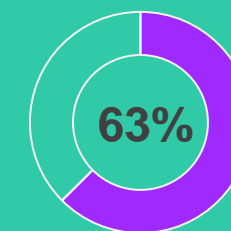
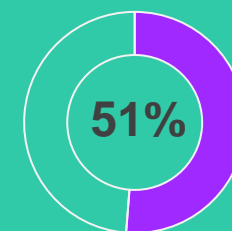
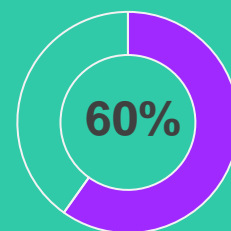
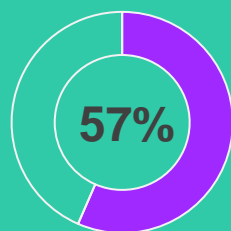
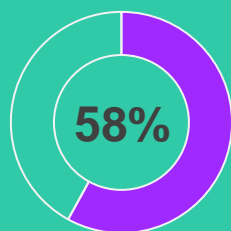
2 out of 10 use AI in their everyday life in the Nordics, with most in Norway and least in Finland. 58% think music created by AI should be labelled “AI” by streaming services, so you know what is made by "robots" and what is made by humans. 69% believe artists and music creators should be asked for permission and paid when their voice or music is used by AI creating music.



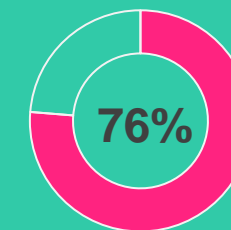
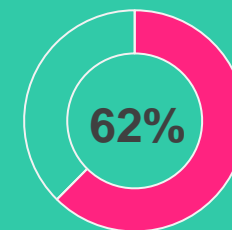
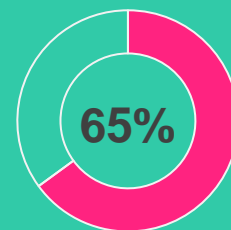
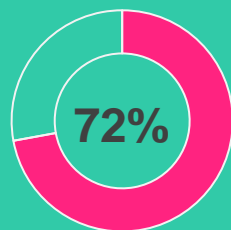
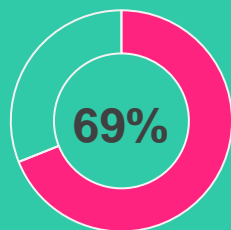
Use AI in the everyday life



Music created by artificial intelligence should be labeled "AI" in streaming services



Artists and music creators should be asked and paid if an AI company uses their voice or songs in music created using AI



Do you use artificial intelligence in your everyday life or at work (e.g. ChatGPT, midjourney, etc.)?

Do you think that music created by artificial intelligence, without human creativity, should be labeled "AI" in streaming services so you know what is made by "robots" and what is made by humans?

Do you think artists and music creators should be asked for permission and paid if an AI company uses their voice or songs in new music created using AI technology?

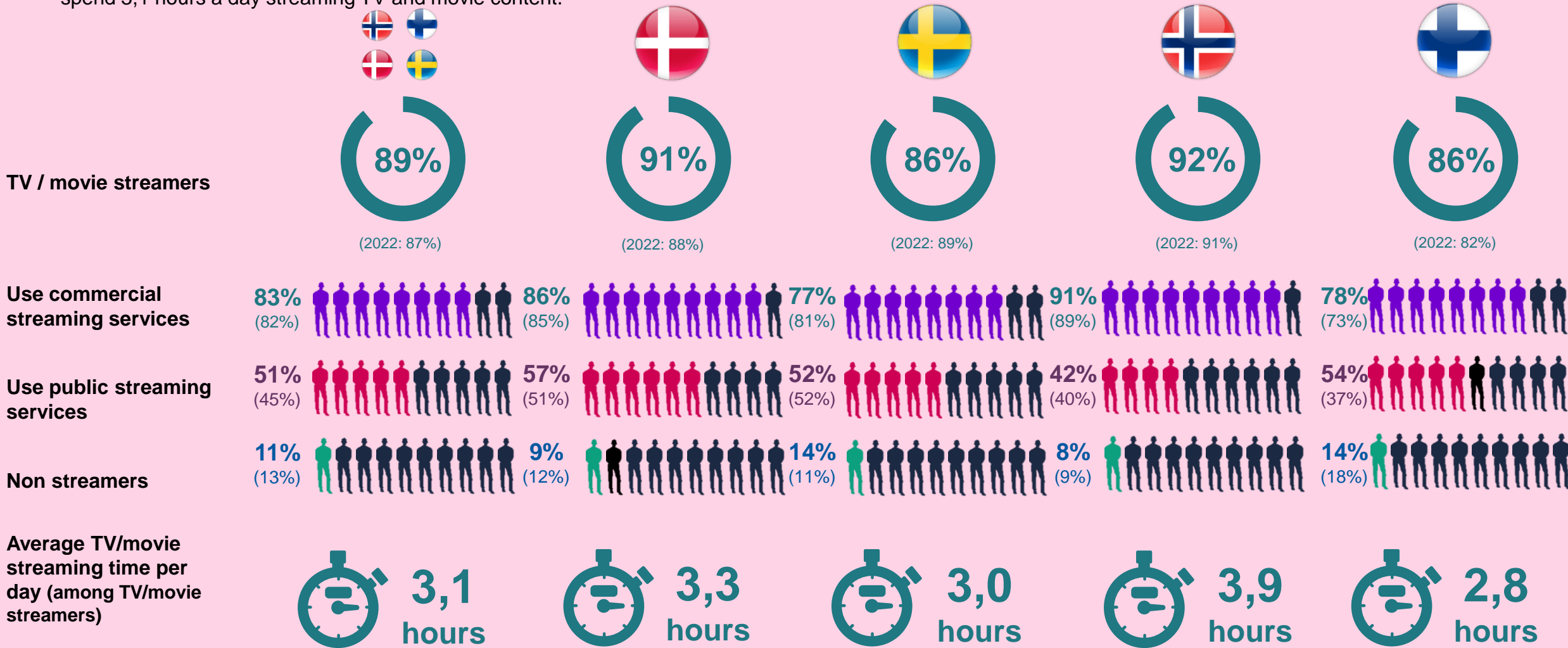
Base: All

A large, curved wall composed of many small, square video thumbnails. The thumbnails are arranged in a grid that follows the curve of the wall. The content of the thumbnails is diverse, including nature scenes, people, animals, and various objects. The wall is set against a dark background, and the overall effect is that of a vast library of video content.

TV/movie Streaming

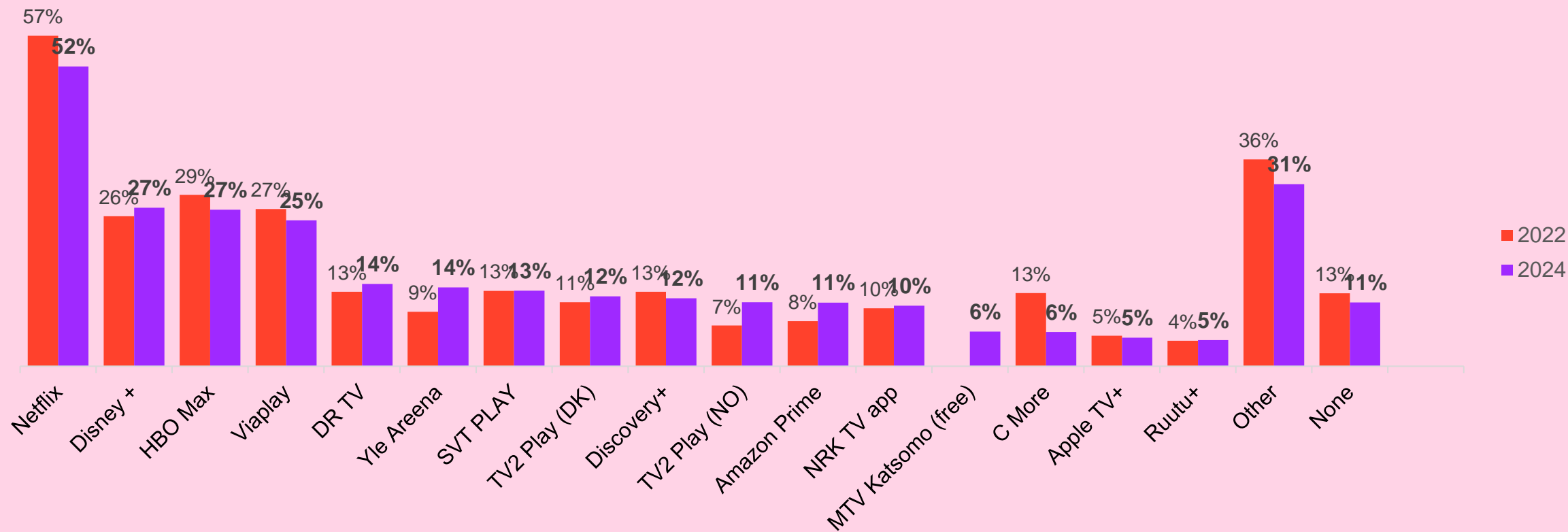
Streaming of TV / movie content – Nordic and countries

Across the Nordics, 89% stream TV / movie content on streaming services, which is just a small increase since 2022. The share of public TV/movie content streamers have increased greatly in all countries the past two years, whereas commercial streaming is more or less status quo. On average, people in the Nordics spend 3,1 hours a day streaming TV and movie content.



Streaming of TV / movie content – Nordic overview

Across the Nordics, Netflix is still the most used digital services for streaming TV and movie content, though a drop is seen since 2022. Disney+ is now second surpassing HBO Max.

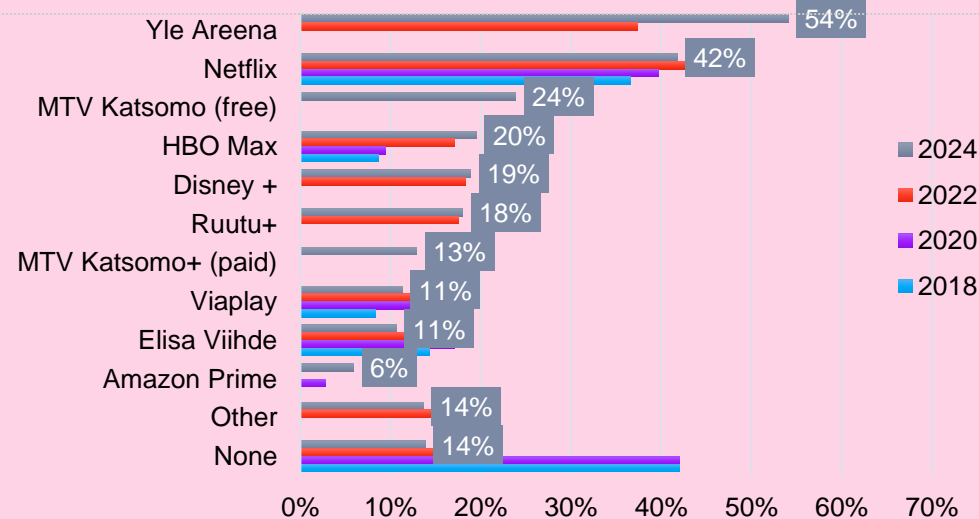
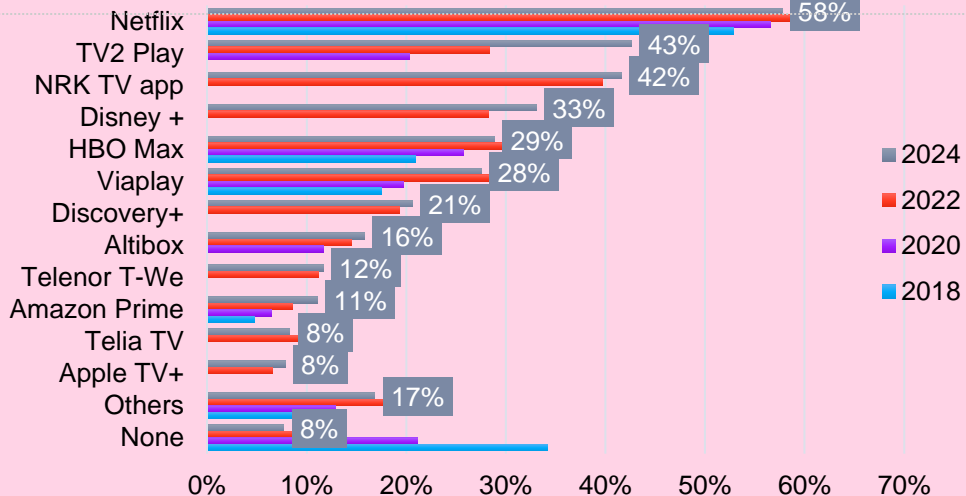
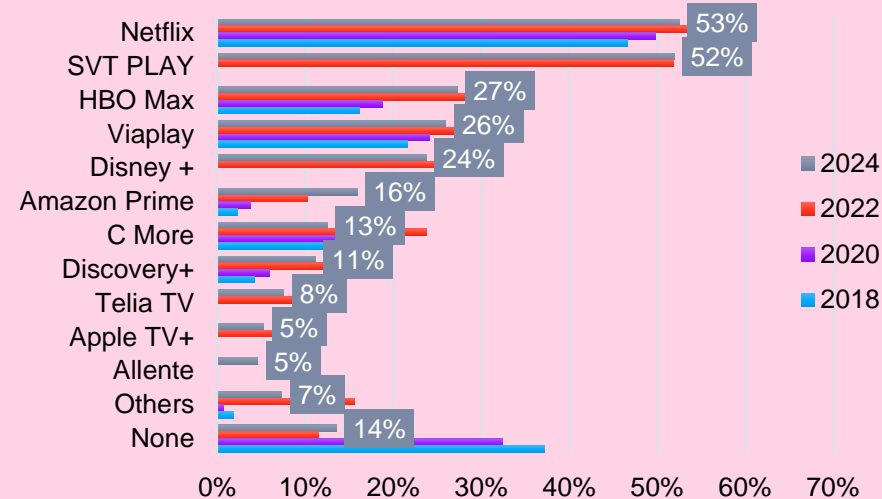
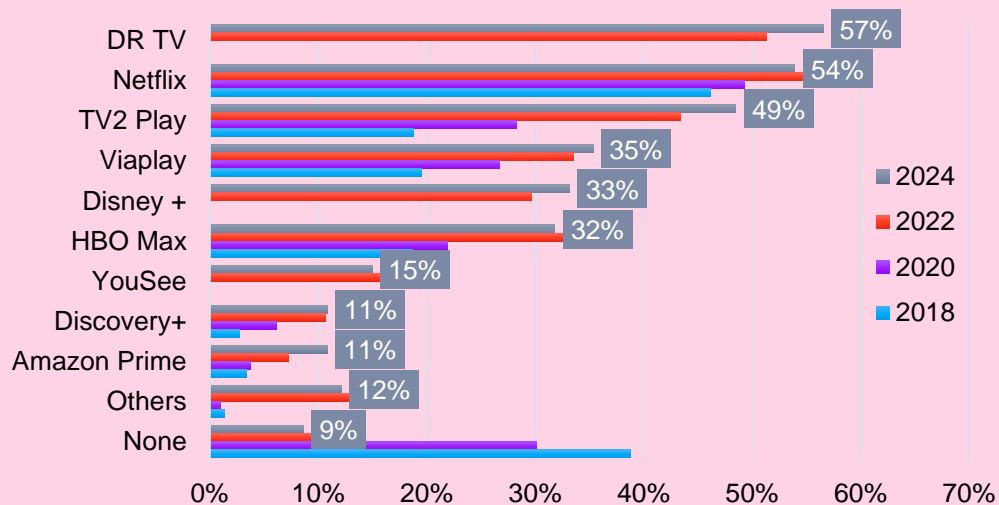


Do you currently use one or several of the following digital services providing TV and/or movie content?
Base: All.

Note: Others = all digital services in 2024 with less than 5%. All streaming services are calculated as the share of the Nordic total and does not reflect local country shares.

Streaming of TV / movie content – Nordic countries

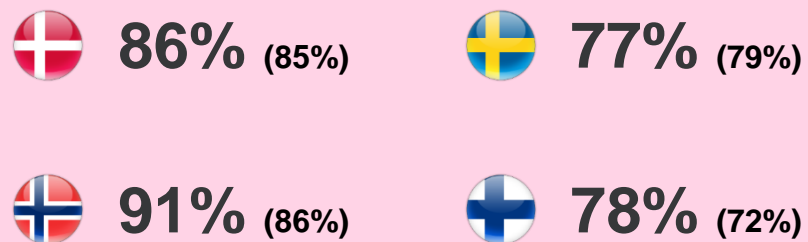
Netflix is competing strongly with the local public digital service providers in all the four markets and have lost slightly since 2022. In Denmark TV2 Play is almost as large as Netflix having increased since 2022, and the picture/trend is similar in Norway.



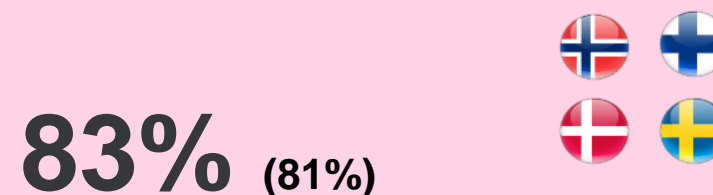
Commercial Services: Streaming of TV / movie content – Nordic countries

The share of people using commercial streaming services has increased a bit since 2022, mainly driven by the Norwegian and Finnish streamers.. A total of 83% of the Nordic people between 12-65 years use at least one commercial TV streaming services and spent on average 3 hours per day using it.

Use at least one commercial TV / movie content streaming service



Nordic total



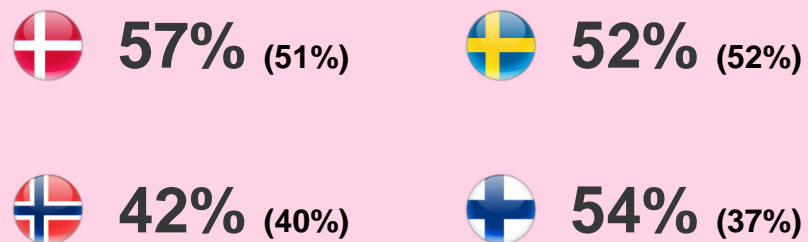
Commercial service providers Average streaming time per day among streamers



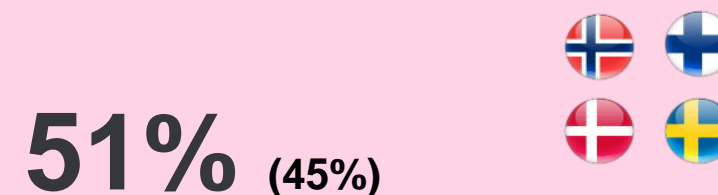
Public Services: Streaming of TV / movie content – Nordic countries

The share of people using commercial streaming services has increased greatly the last two years, driven mainly by increased use of DR TV (DK) and Yle Areena (FI) – and change of Yle to Yle Areena since 2022. A total of 51% of the Nordic people between 12-65 years use at least one public TV streaming services with an average of 0,9 hours per day.

Use at least one public TV / movie content streaming service



Nordic total

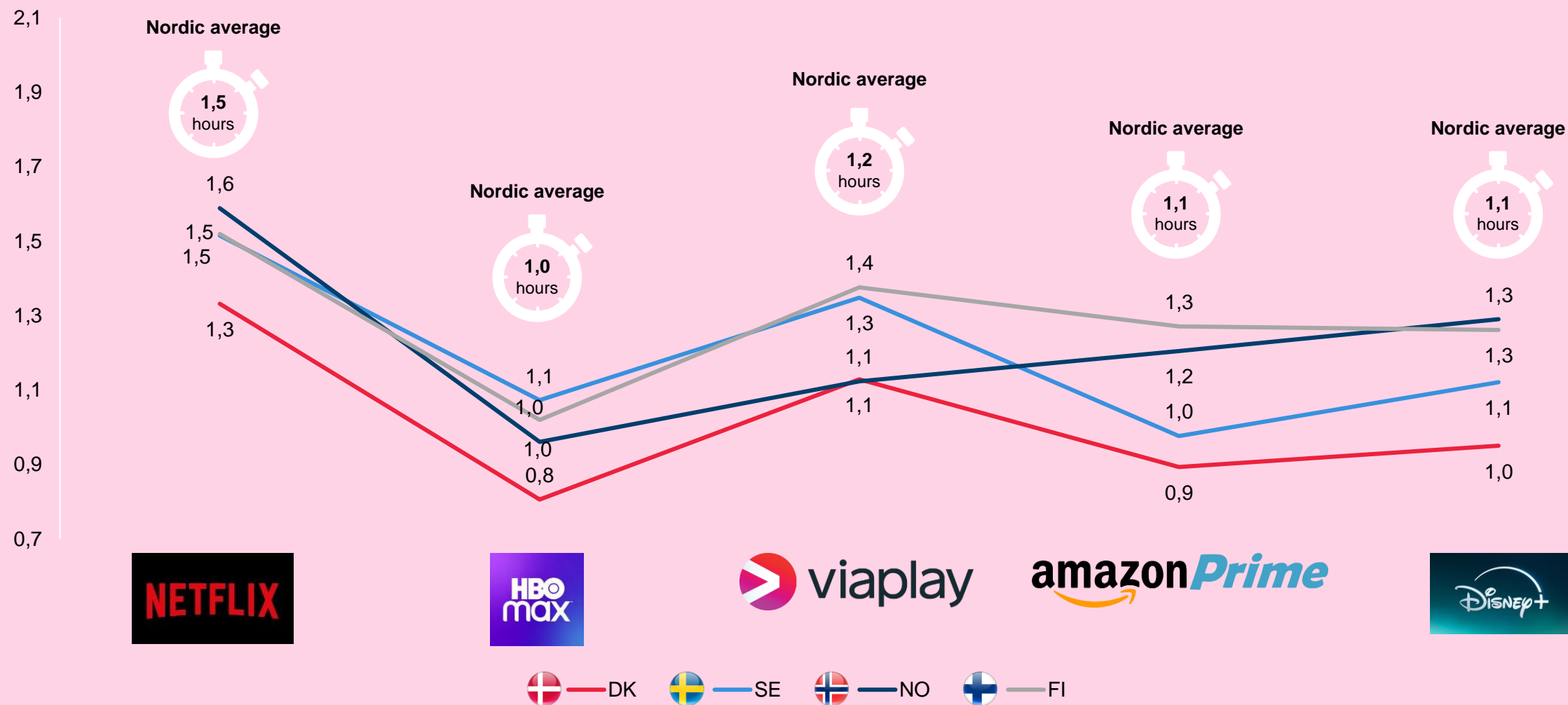


Public service providers Average streaming time per day among streamers



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

On a Nordic level, excluding local public service providers, subscribers still spend the most time per day on watching Netflix. Norway and Sweden spend more time relatively on C More compared to Danes and Finns. Danes in general spend less time of the streaming services displayed compared to the rest of the countries.



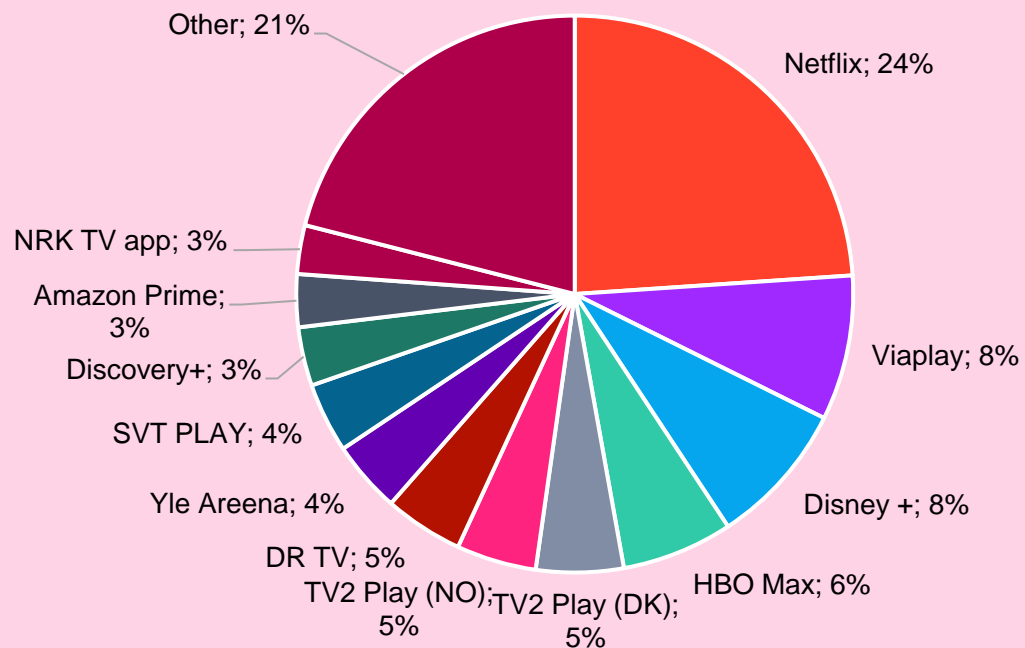
How many hours per day do you spend on watching TV/video content from the following services?
 Base: Use the given digital service.

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

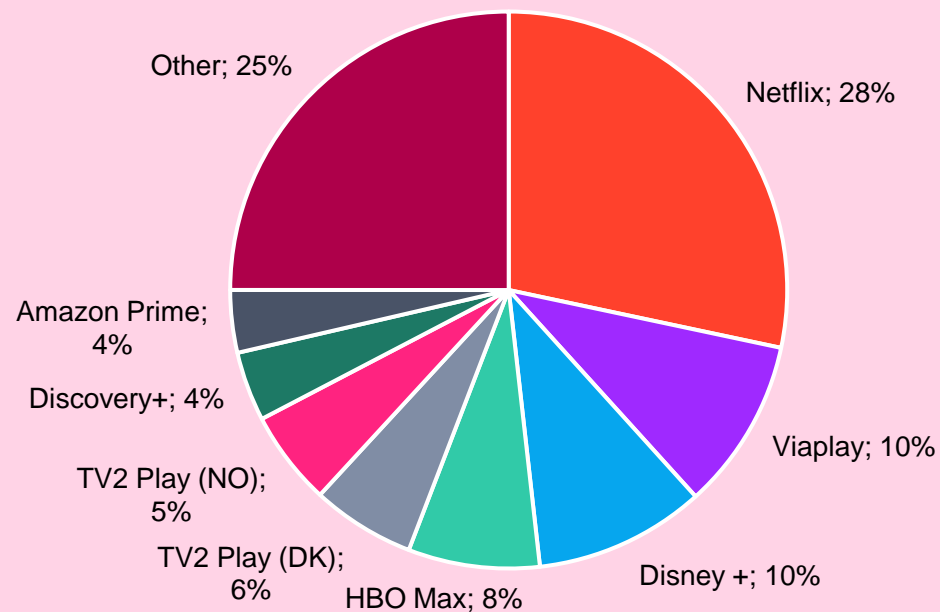
Netflix has by far the largest share of the streaming market with a quarter of all streaming time across the Nordic countries. Viaplay, Disney+ and HBO Max takes the following places but is still far behind Netflix.

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

Among all service providers



Among commercial service providers

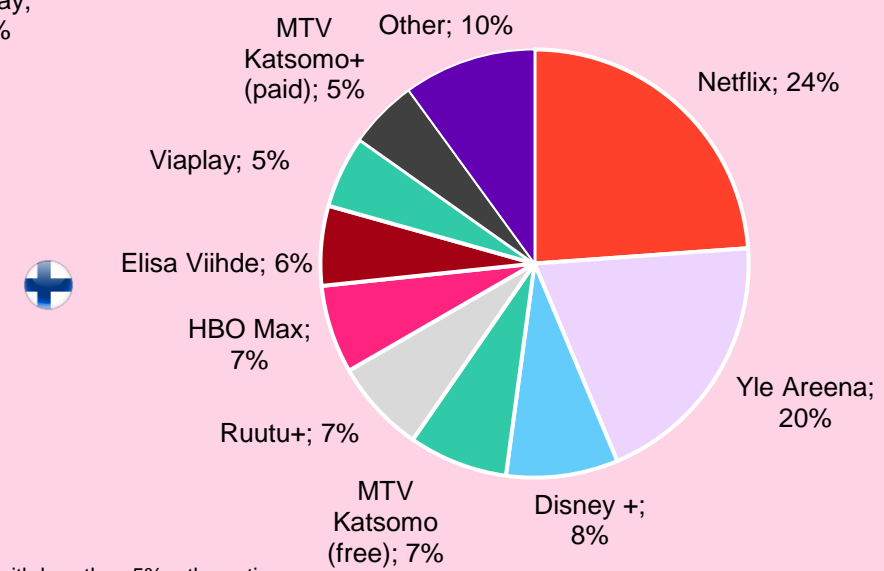
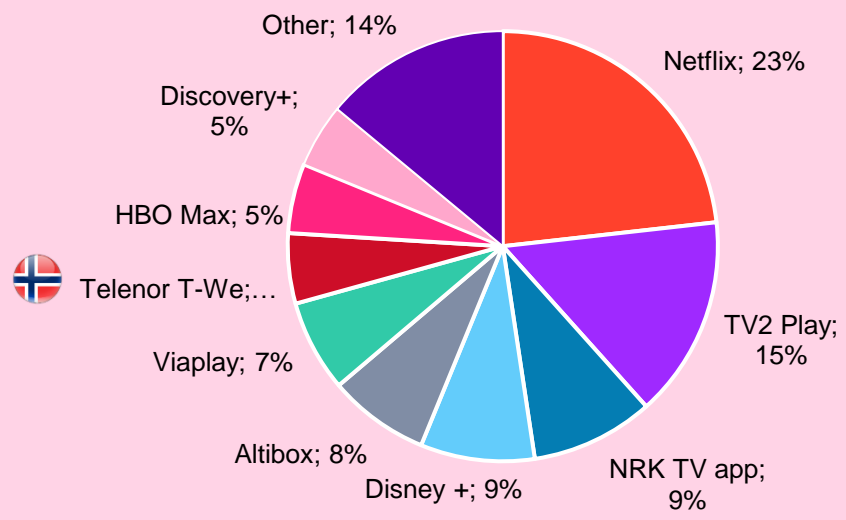
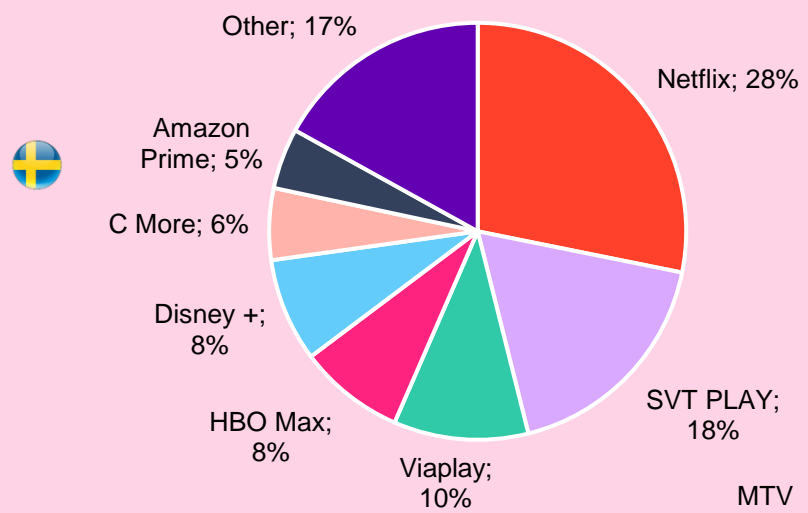
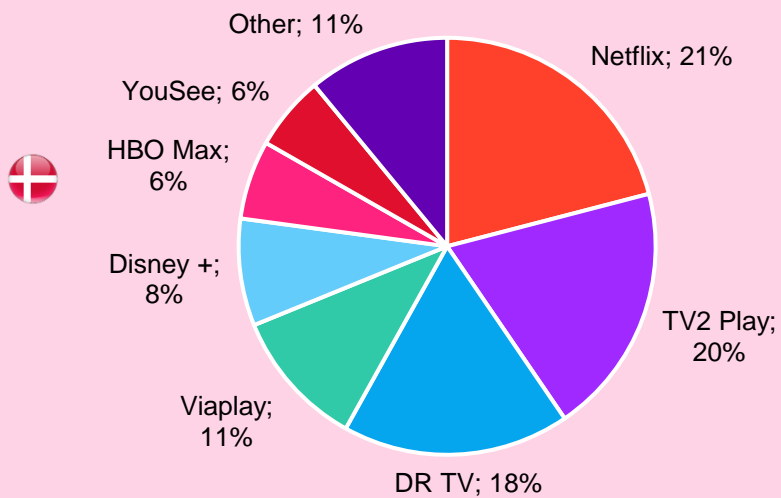


How many hours per day do you spend on watching TV/video content from the following services?
Base: Use the given digital service.

Note: Others = All streaming services with less than 3% share of daily time spent + the option "Other digital service"

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

Netflix is a true large Nordic player (largest in Sweden), while TV2 Play (DK/NO), and national public service providers are following measured on time spent. The second largest commercial streaming services are Viaplay in Denmark and Sweden, and Disney+ in Norway and Finland.

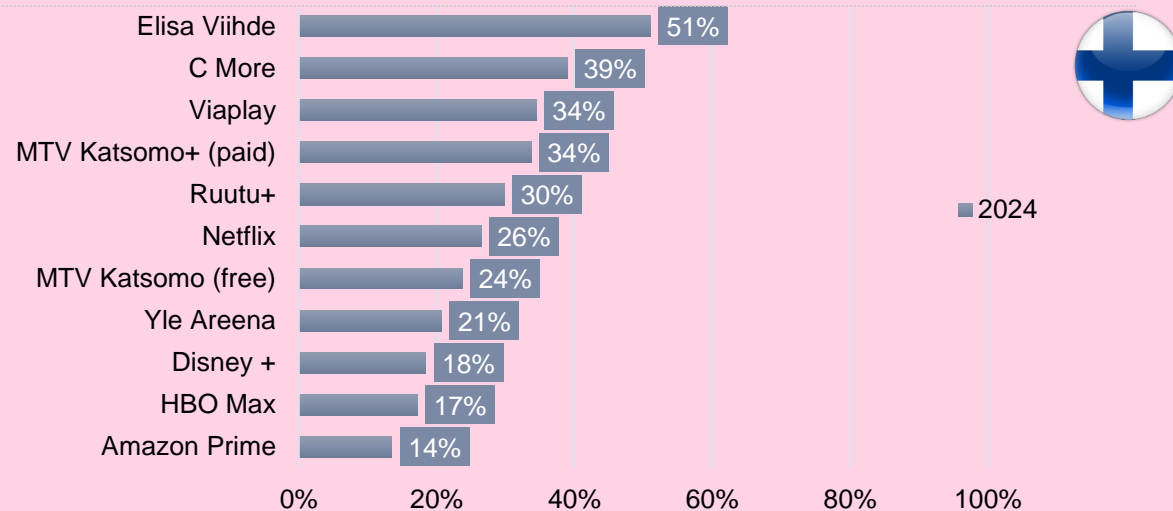
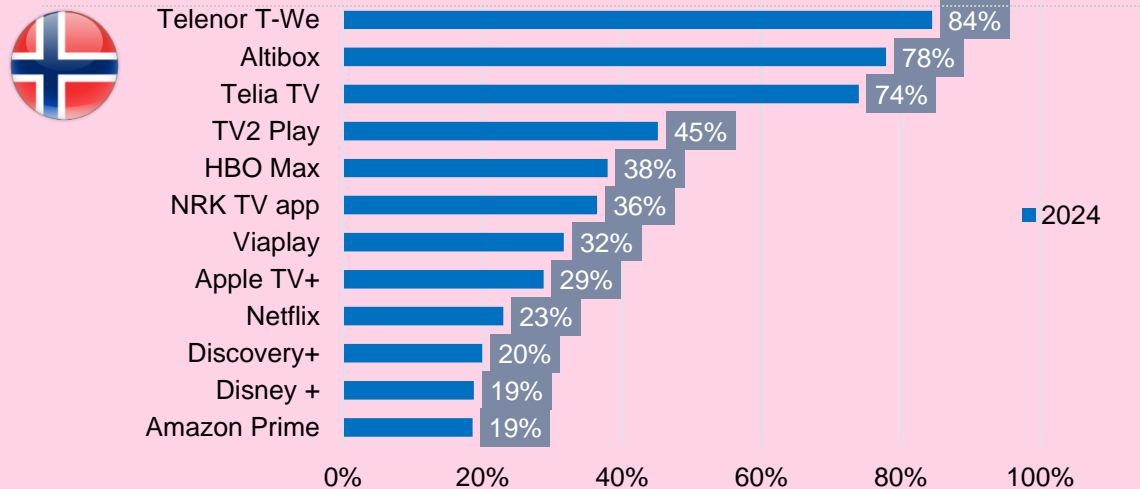
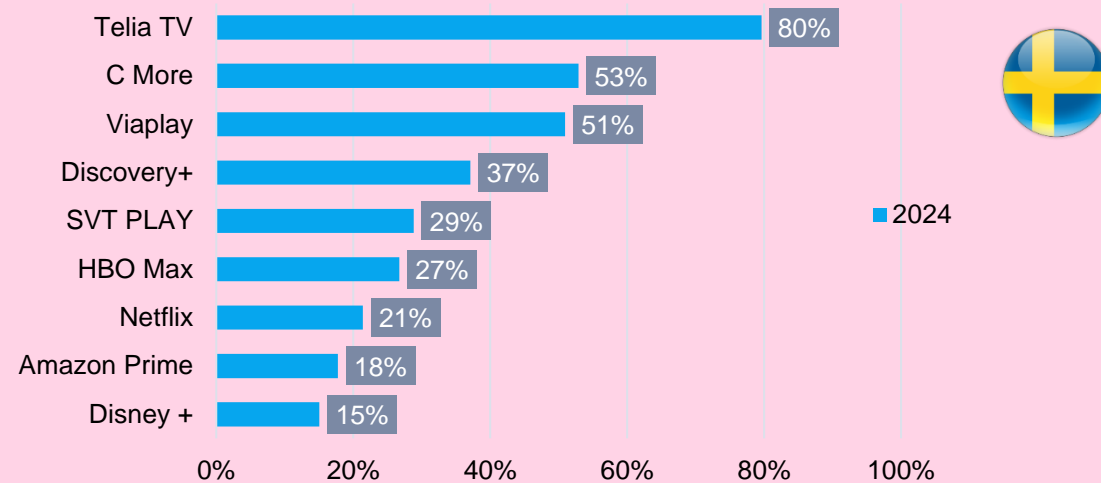
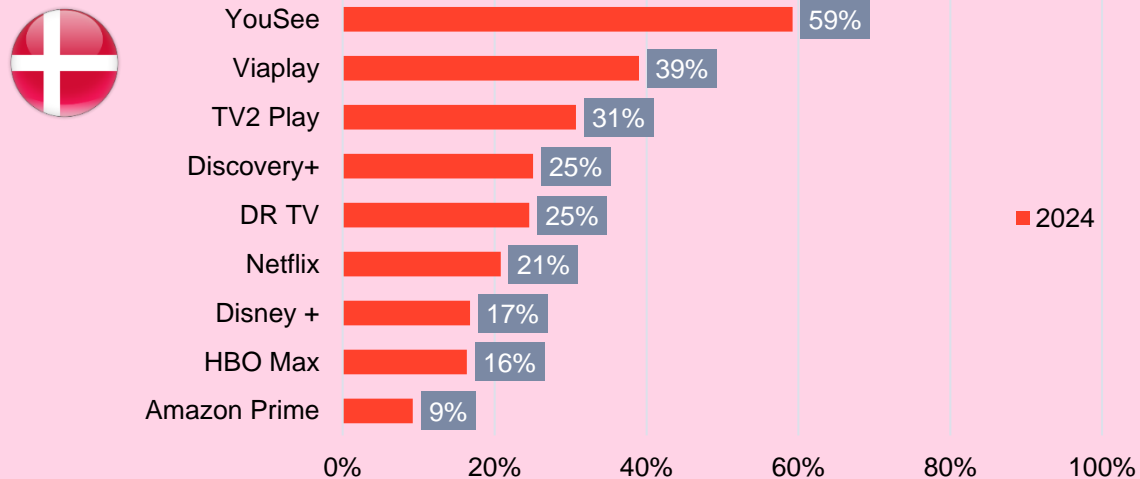


How many hours per day do you spend on watching TV/video content from the following services?
Base: Use the given digital service.

Note: Others = All streaming services with less than 5% + the option "Other digital service"

Streaming services being part of a TV bundle – Nordic countries

Several streaming services are part of a TV bundle and e.g., Elisa Viihde in Finland is bundled for more than half of all users of the streaming service. Telia TV in Sweden and Telenor T-WE in Norway is bundled for more than 8 out of 10 users of the services.

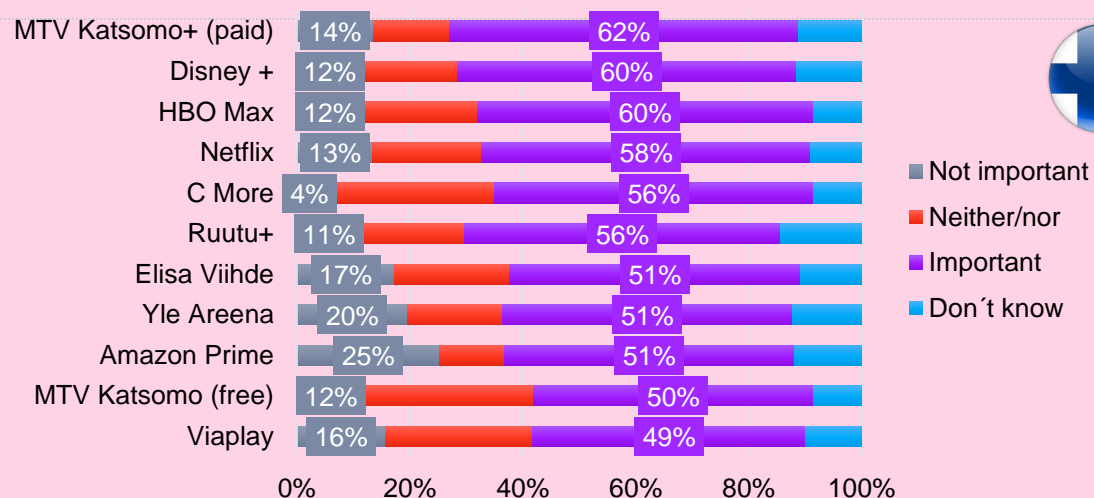
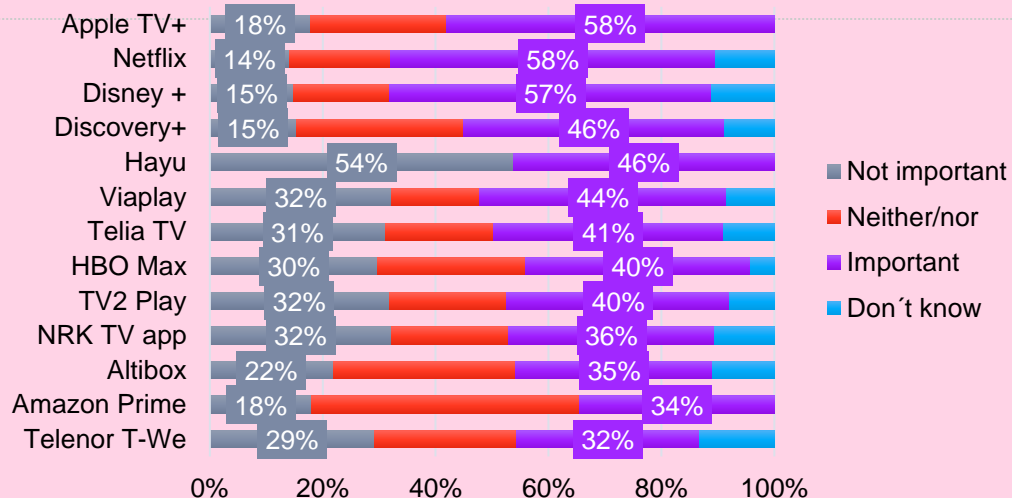
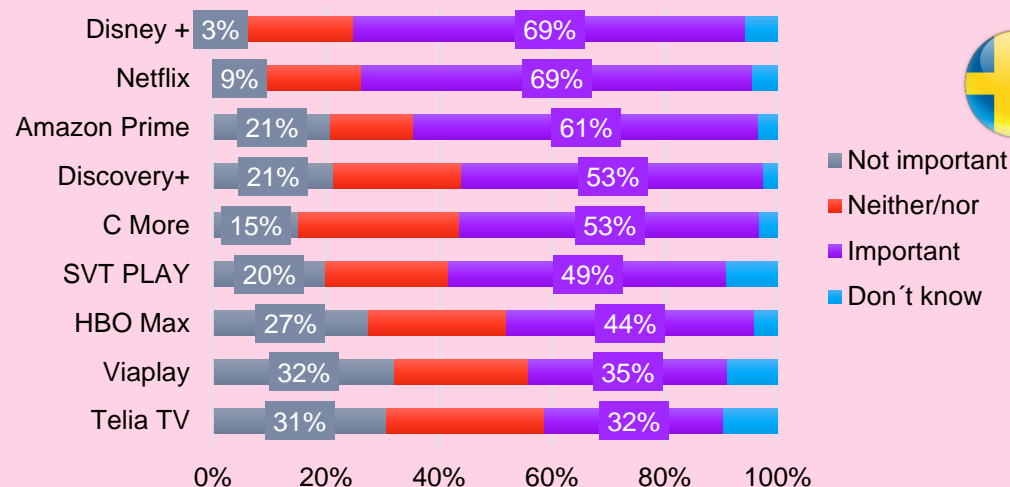
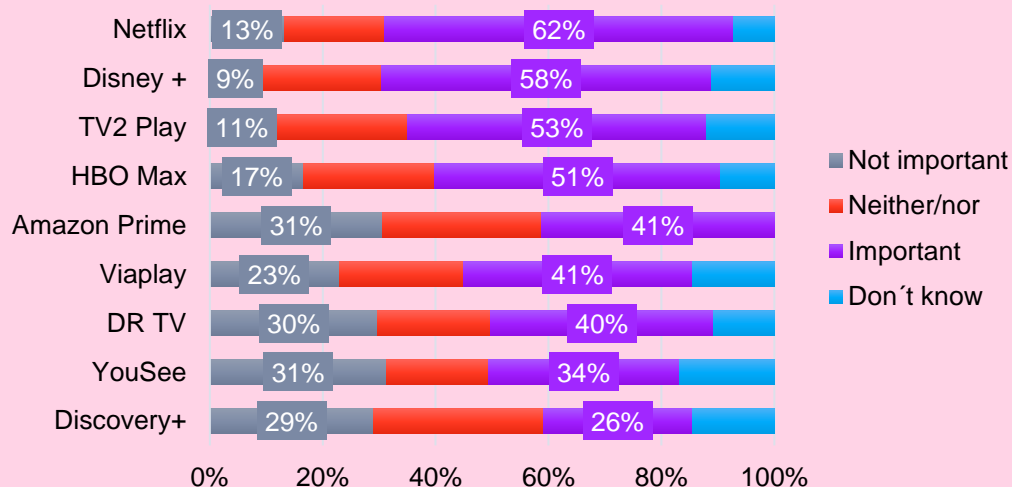


Is your access to the video on demand-service a part of a TV bundle?
 Base: Use the given digital service.

Note: Only streaming services with more than 50 answers are shown

Importance of streaming services being part of a TV bundle – Nordic countries

The inclusion of streaming services in TV bundles is important for about half the Nordic people with access to the services in a bundle. Most important is the top commercial streaming services like Netflix and Disney+, however local differences exist.



How important was this access to the video on demand-service for your decision to buy the bundle?

Base: Using the digital service as a part of a TV bundle

Note: Only streaming services with more than 50 answers are shown

Polaris Nordic Digital Music in the Nordics

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