



# *DANSKERNES DIGITALE MUSIKFORBRUG*

*Temadag for musikbibliotekarer*  
22. november 2018 – Thue Iversen - Koda

# *45 MINUTTER*

- Om Koda – og hvorfor vi undersøger det digitale musikforbrug
- Undersøgelsen: Digital Music in the Nordics 2018

Hvis tid:

- Hvad gør streamingtjenester ved forbruget? (Rasmus Rex)
- Dansk musikomsætning 2017

# *KODAS OPGAVE*



**koda**<sup>®</sup>

## ***KODA FORVALTER MUSIKSKABERNES RETTIGHEDER***

*Koda sørger for,  
at komponister og sangskrivere får den betaling,  
de har ret til,  
når deres musik spilles offentligt.*

Siden 1926





## *OPHAVSRETTE*

### *- EN MENNESKERET*

*”Enhver har ret til **beskyttelse** af de moralske og materielle interesser, der hidrører fra en hvilken som helst videnskabelig, litterær eller **kunstnerisk frembringelse**, som vedkommende **har skabt.**”*

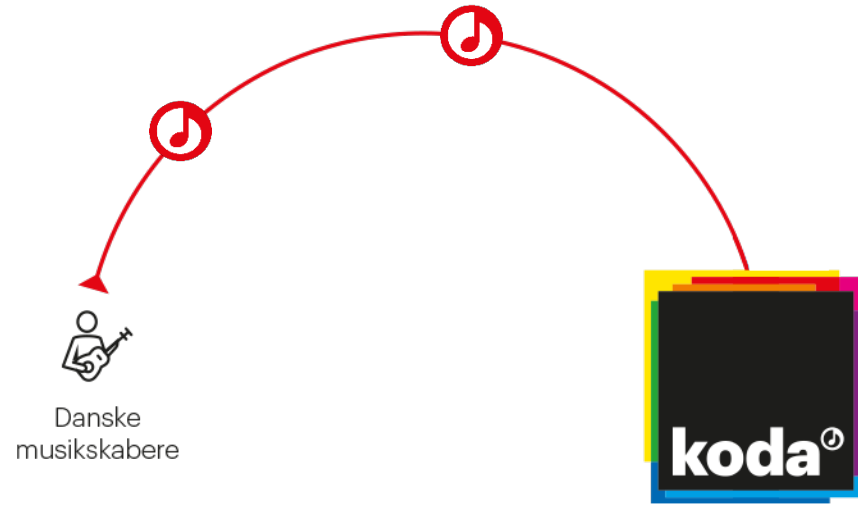
Artikel 27  
FN's menneskerettigheder



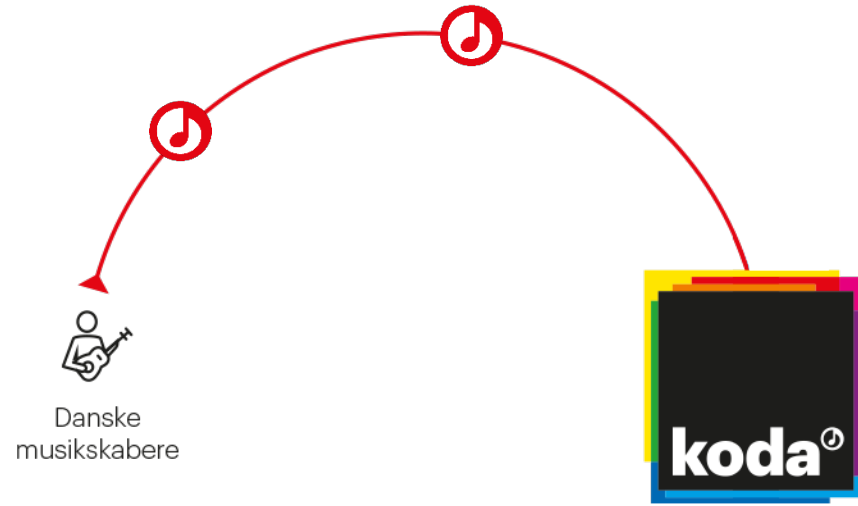
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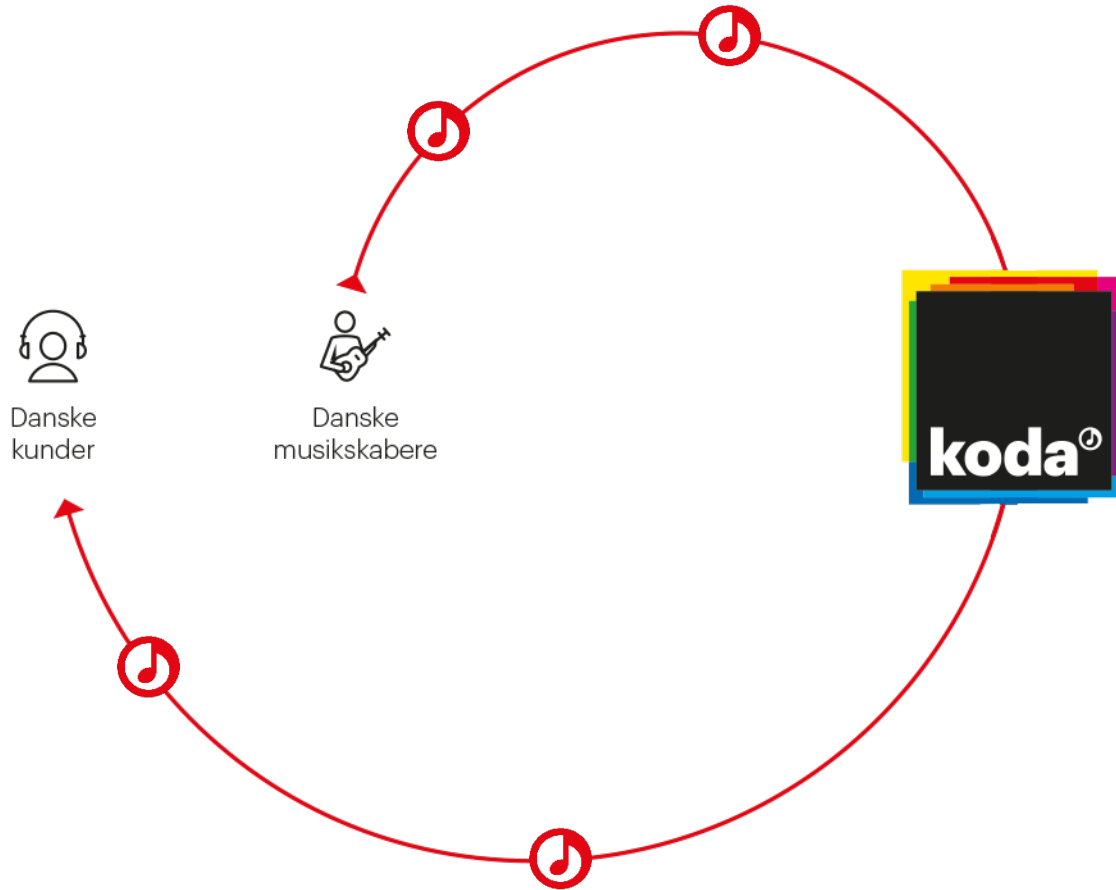
Danske  
musikskabere

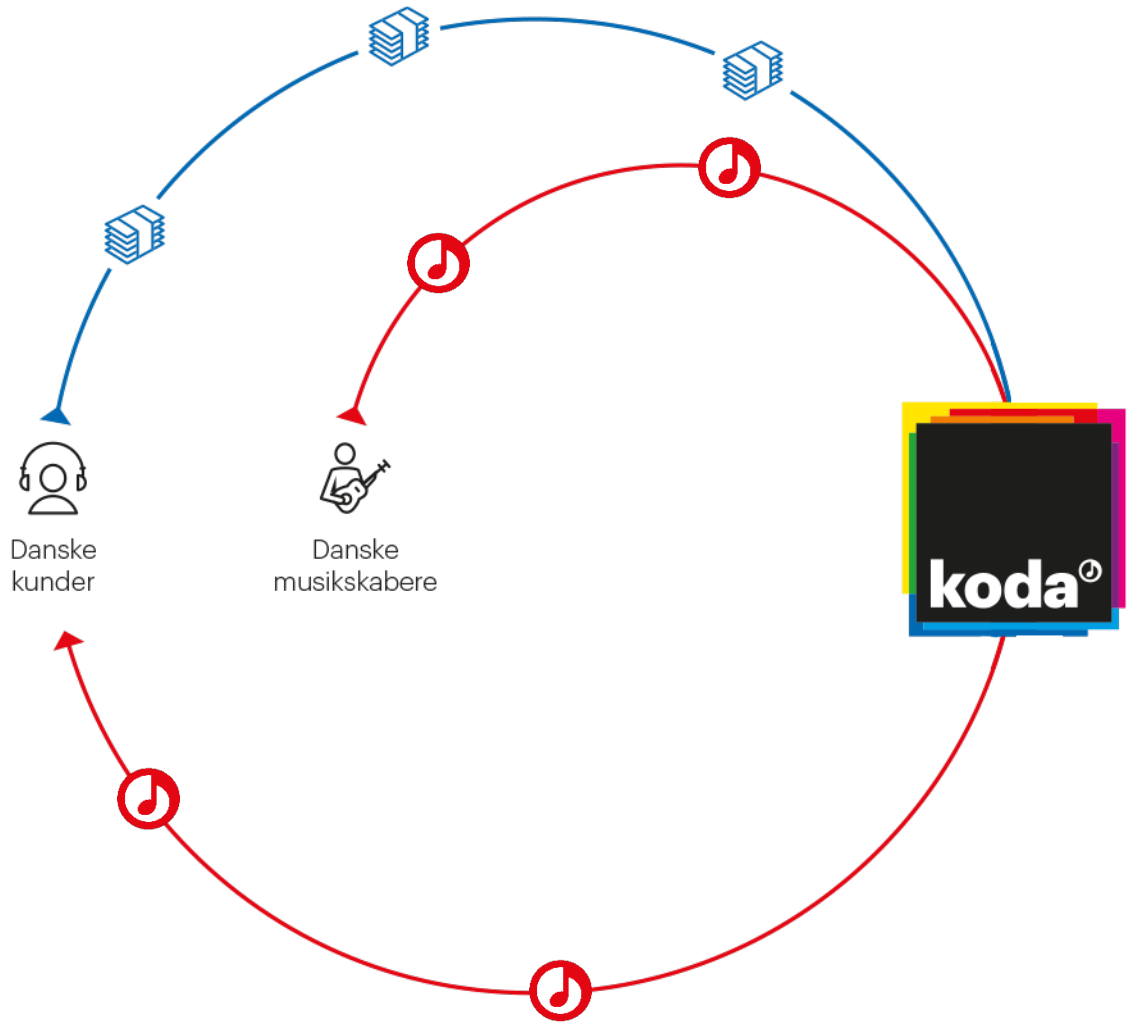


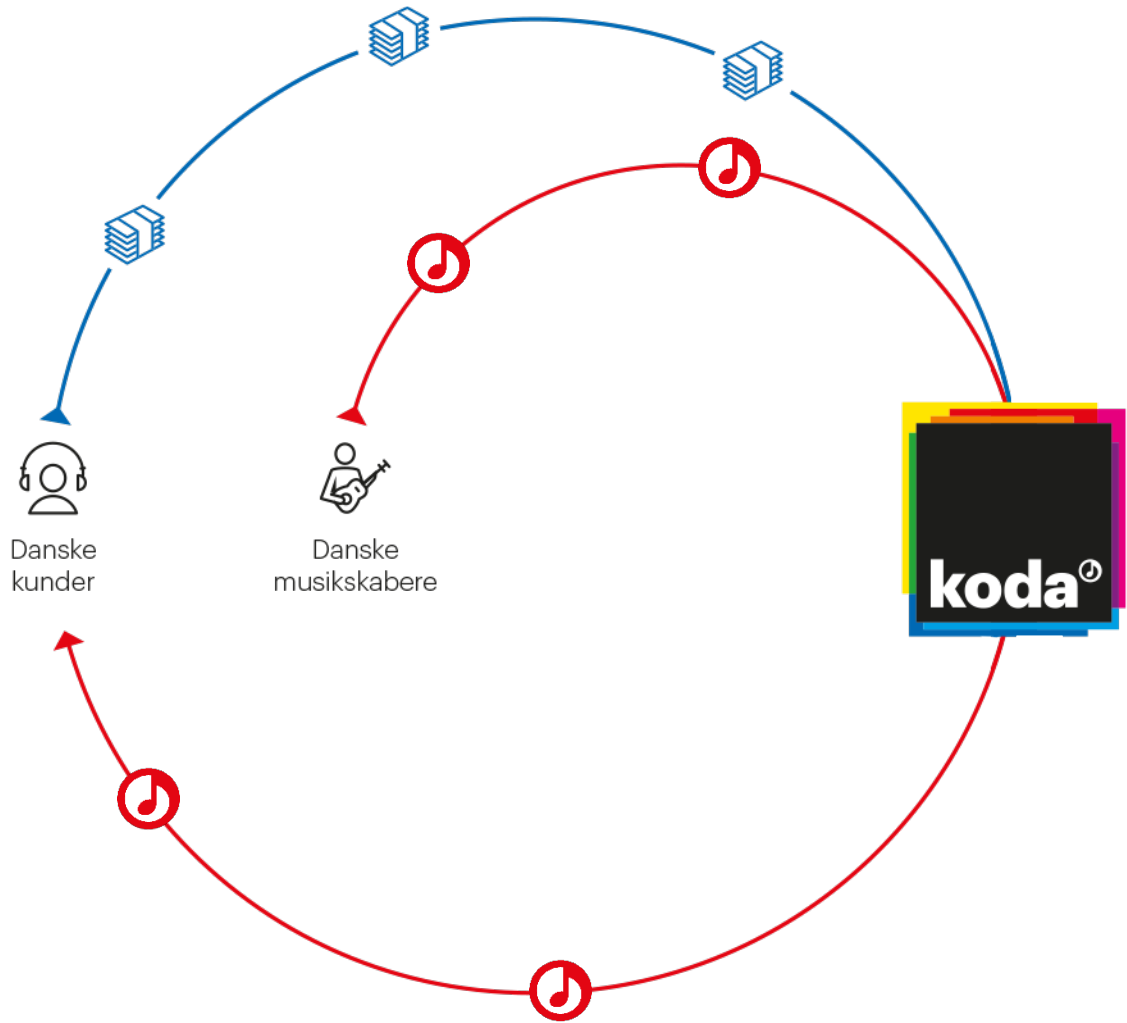
Danske musikskabere

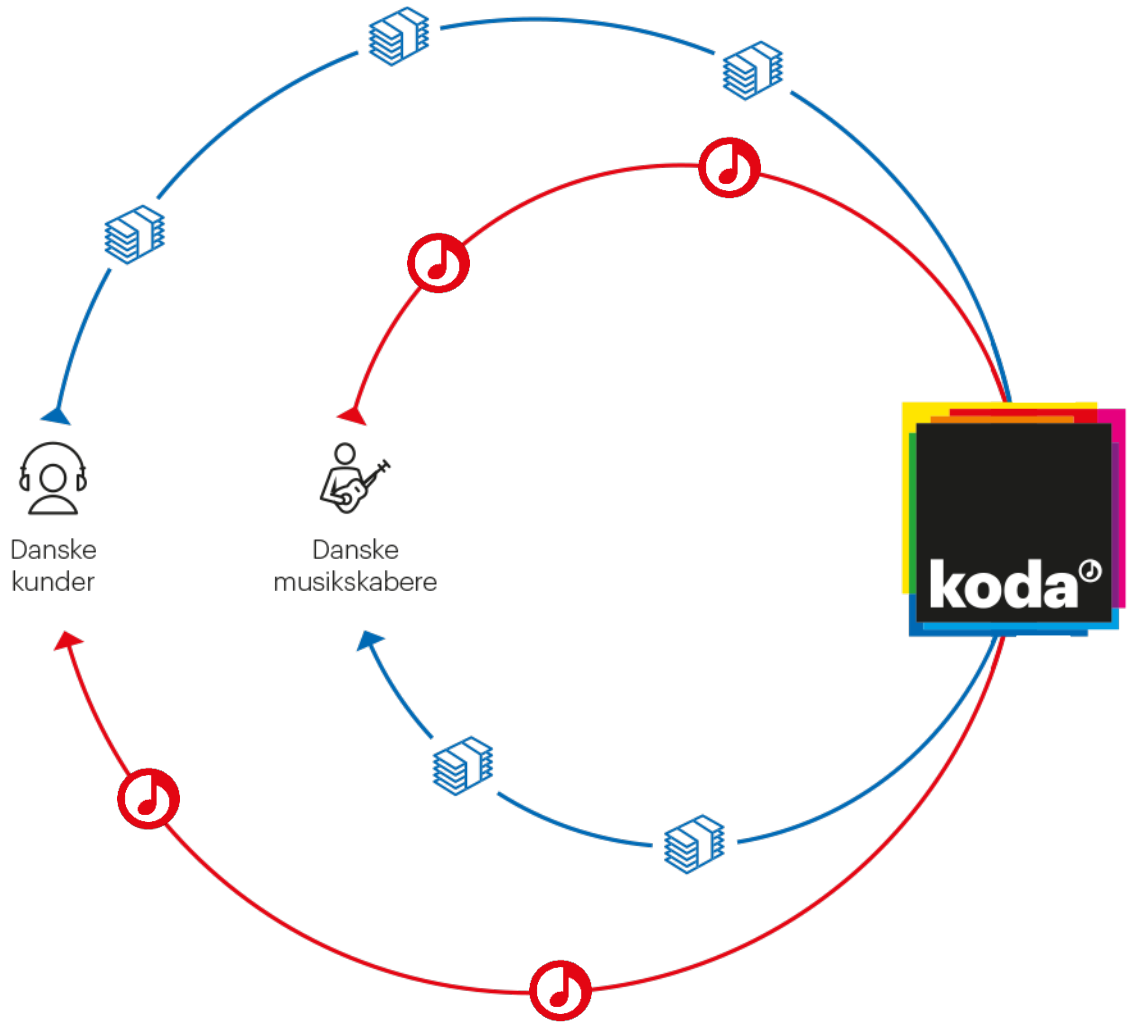


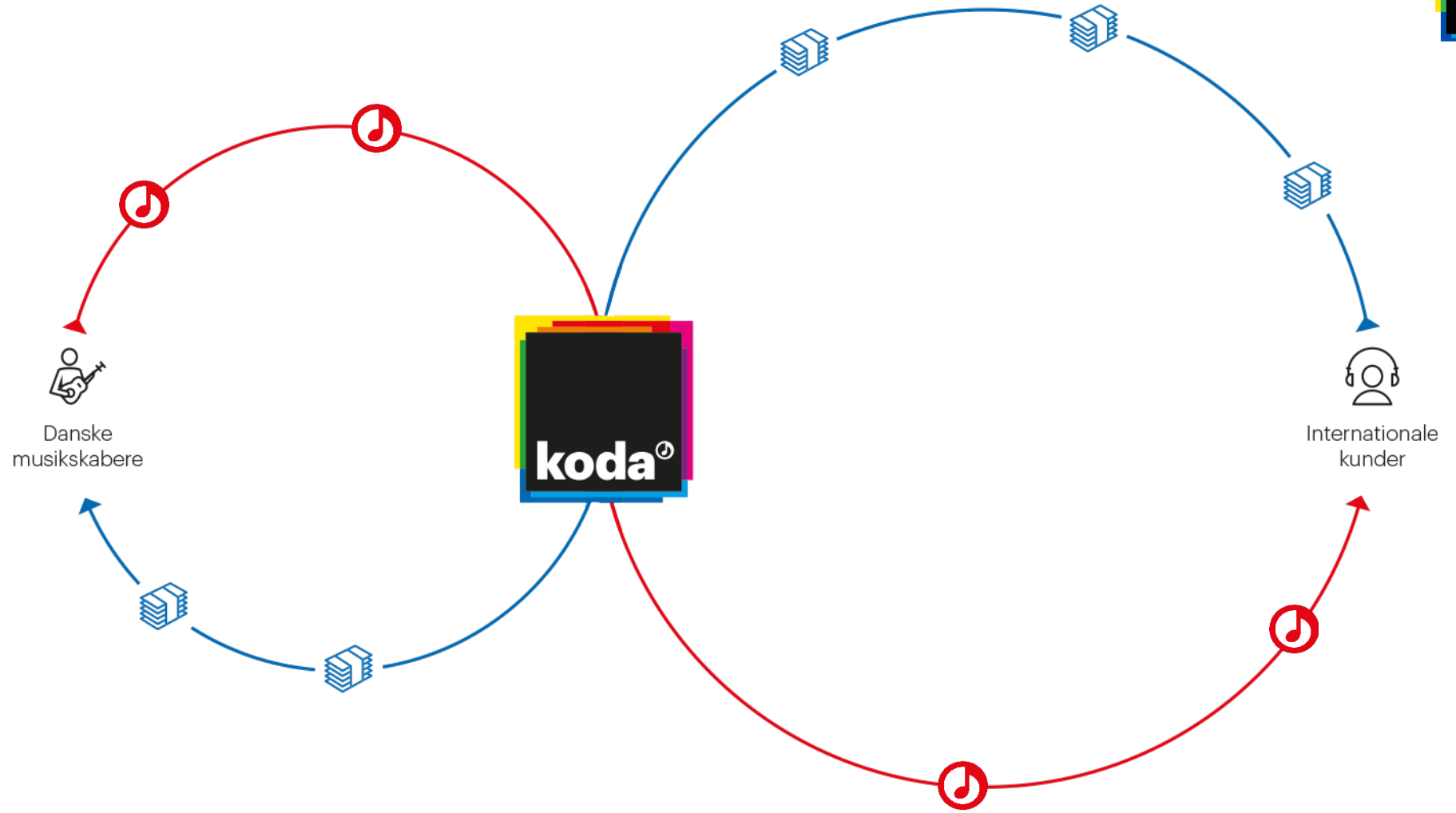




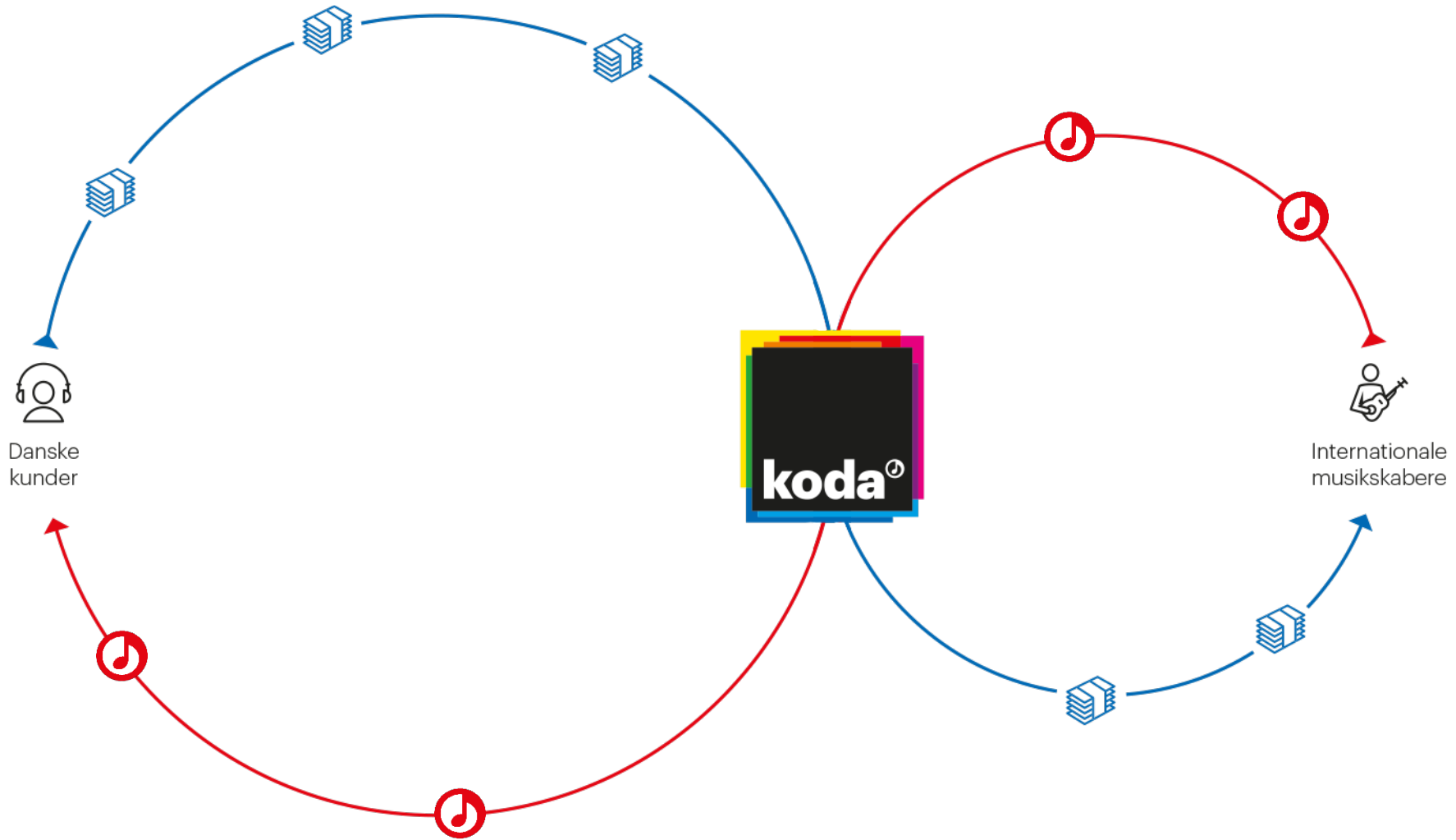


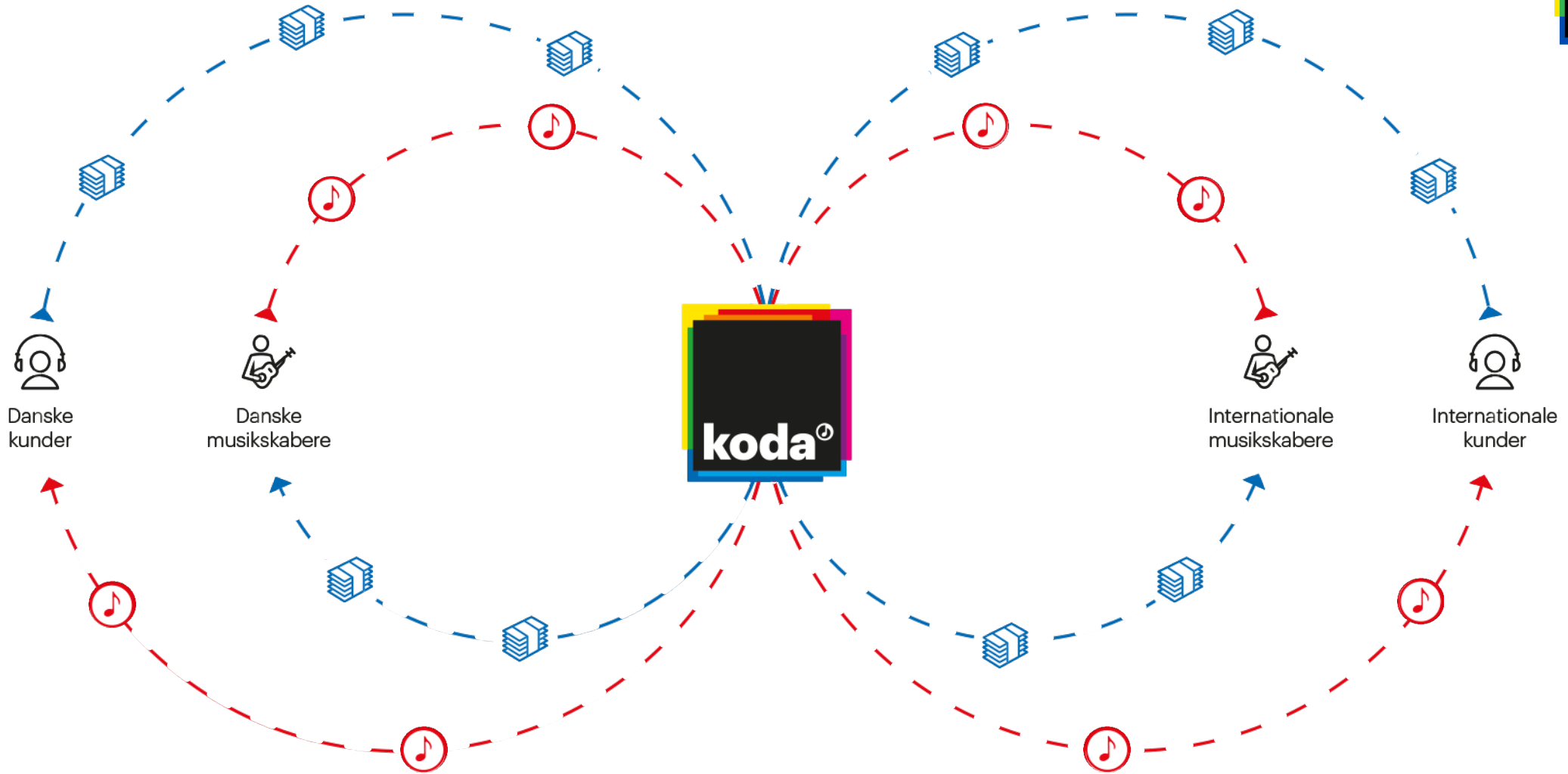












# *ET ÅR I KODA*



**koda<sup>®</sup>**

# 2017

**110** ansatte sørger for

**40.000** kunder betaler

Over **1.000.000.000** kroner for

Brugen af mere end **700.000** forskellige musiknumre

**22.000** af i alt **46.000** medlemmer får betaling

Medlemmerne registrerer i snit **150** nye numre om dagen

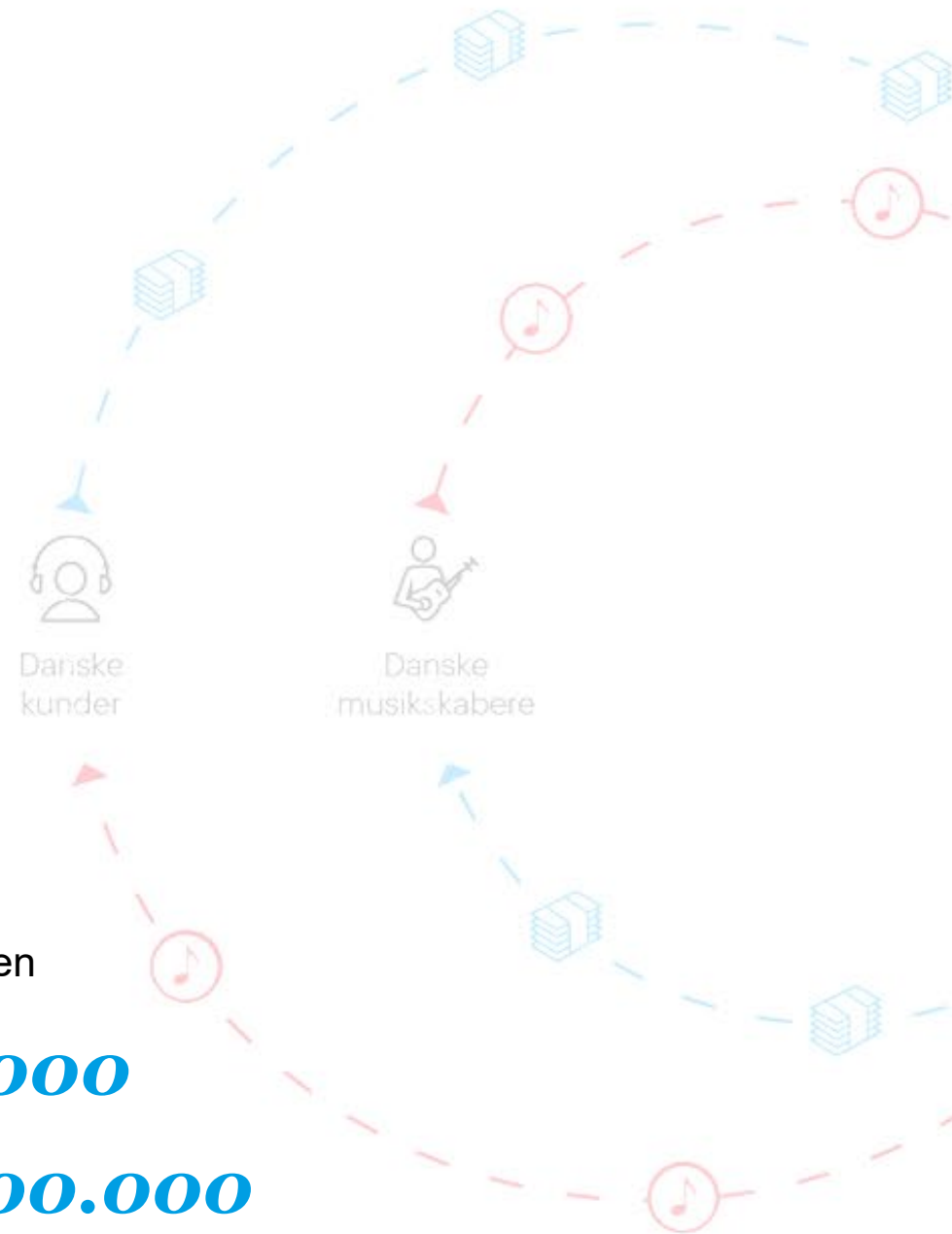
Koda er nonprofit og mere end **90** procent af indtægterne går til musikken

Mere end to 2/3 af Kodas udbetalinger går til udlandet: **457.000.000**

1/4 af udbetalinger til danske medlemmer kommer fra udlandet: **87.000.000**

Danske kunder

Danske musikskabere



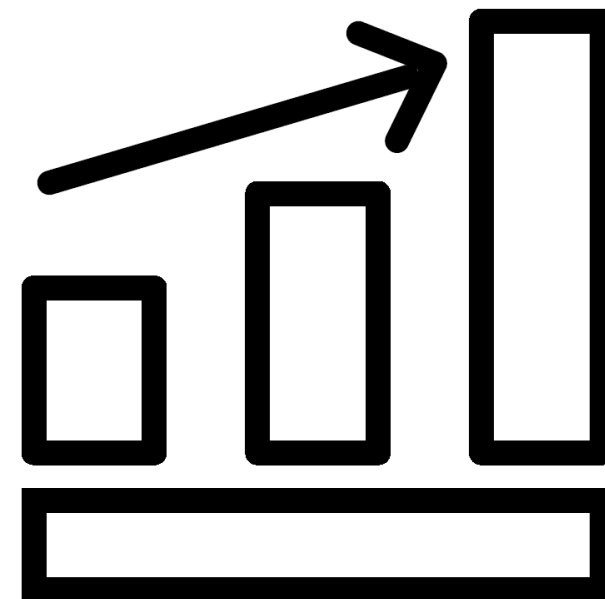
# *INDTÆGTER FRA ONLINE*

**231** millioner

mere end **20** procent af omsætningen

## *UDVIKLINGEN*

- Fra nul og piratjenester
- Til iTunes (2005), BibZoom (2006), TDC PLAY (2008), Wimp 2010, Spotify 2011 og Apple Music 2016





# *UDFORDRINGEN I DAG*

- Lav eller ingen betaling fra tjenester som YouTube og Facebook
- Løsning: Reform af ophavsretten i EU





# Polaris Nordic

## Digital Music in the Nordics

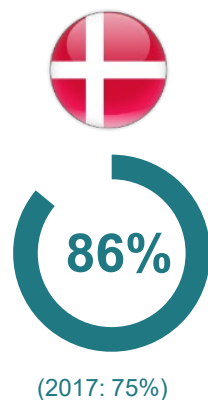
October 2018

By: Simon Bugge Jensen & Marie Christiansen Krøyer

**YouGov**<sup>®</sup>

# DIGITALT MUSIKBRUG I DK

Music streamers



- 15 procent flere streamer

Premium subscribers/  
bundlers



Only use free/trial  
versions

(do not have any paid  
subscription)



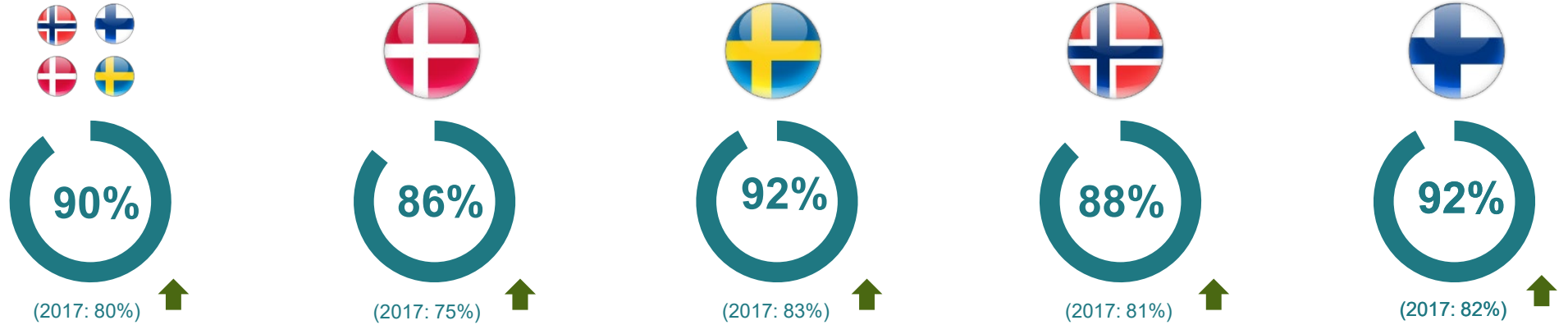
Non streamers



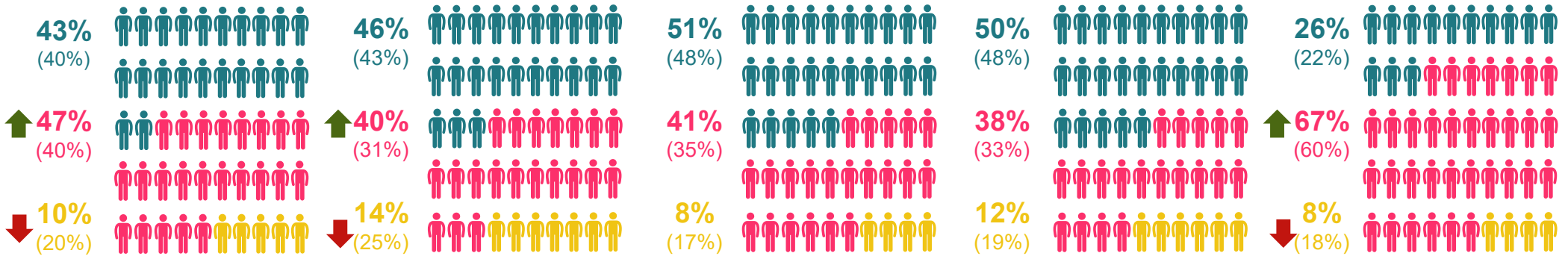
- Lidt mere end halvdelen af forbrugerne betaler
- 30 procent flere streamer **kun** gratis

Music consumption – Nordic and countries overview

Music streamers



Premium subscribers/  
bundlers

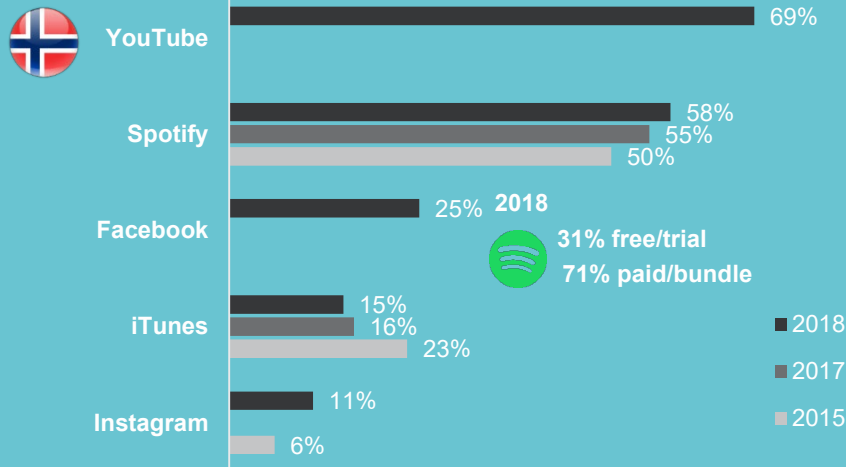
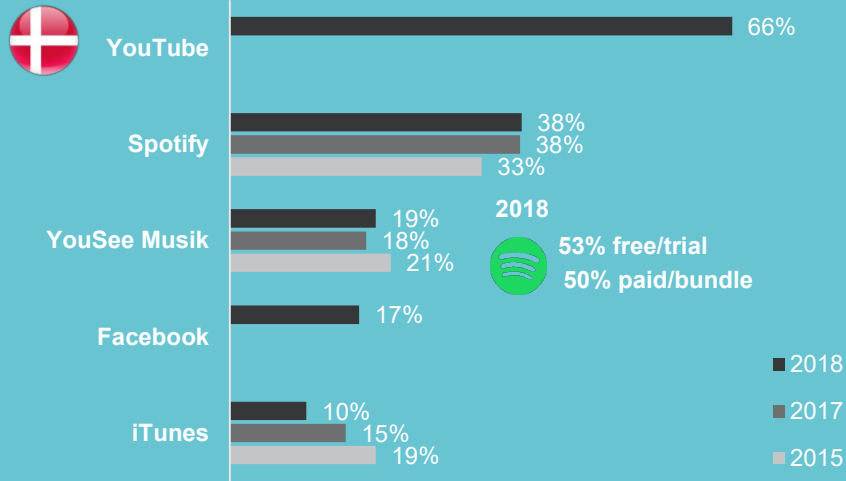


**Only use free/trial versions**  
(do not have any paid subscription)

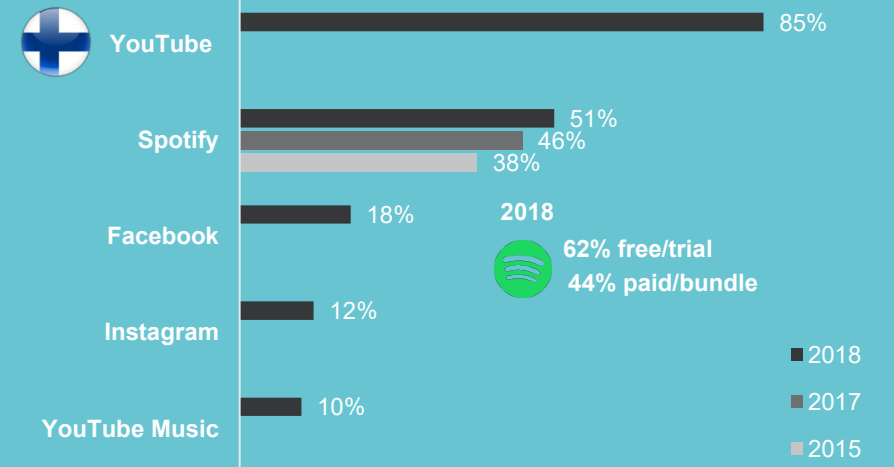
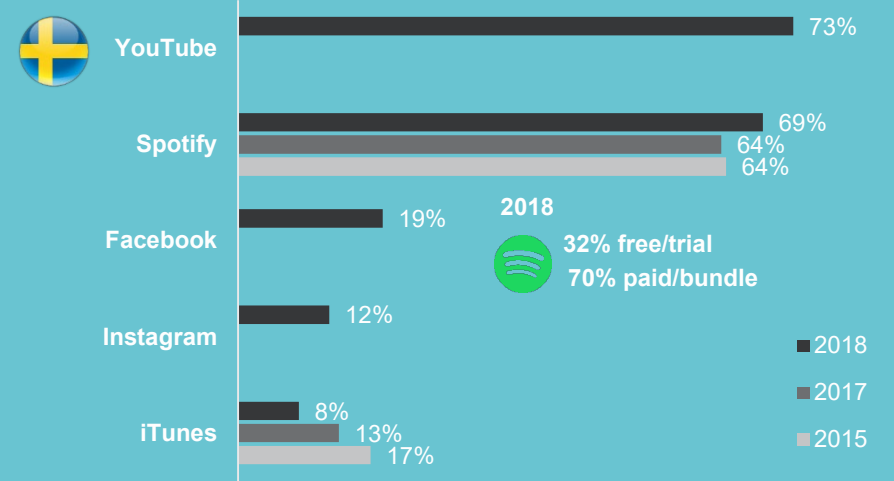
Non streamers

Top 5 audio and video services used for streaming of music

# HVOR ER FORBRUGERNE?



**Spotify usage**  
Note that the question (Q9a) was multiple hence the percentages do not sum to 100%



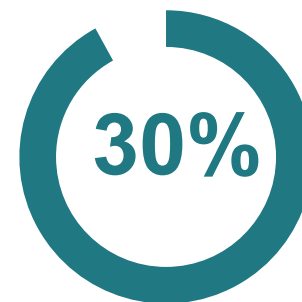
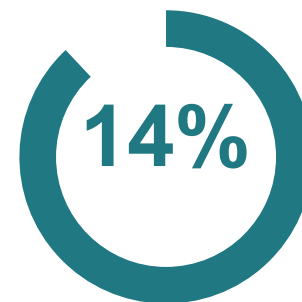
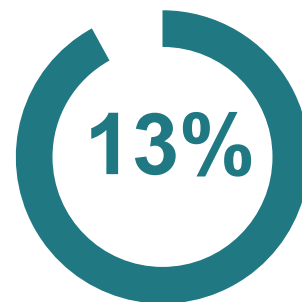
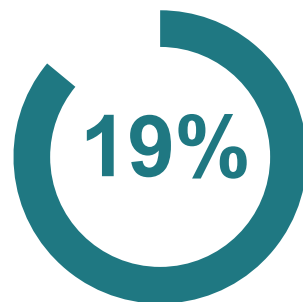
Q7a Which of the following digital music services do you use when listening to music?  
Base: All

Q7b Which of the following digital services/social media do you use to watch or listen to music or music videos?  
Base: All

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

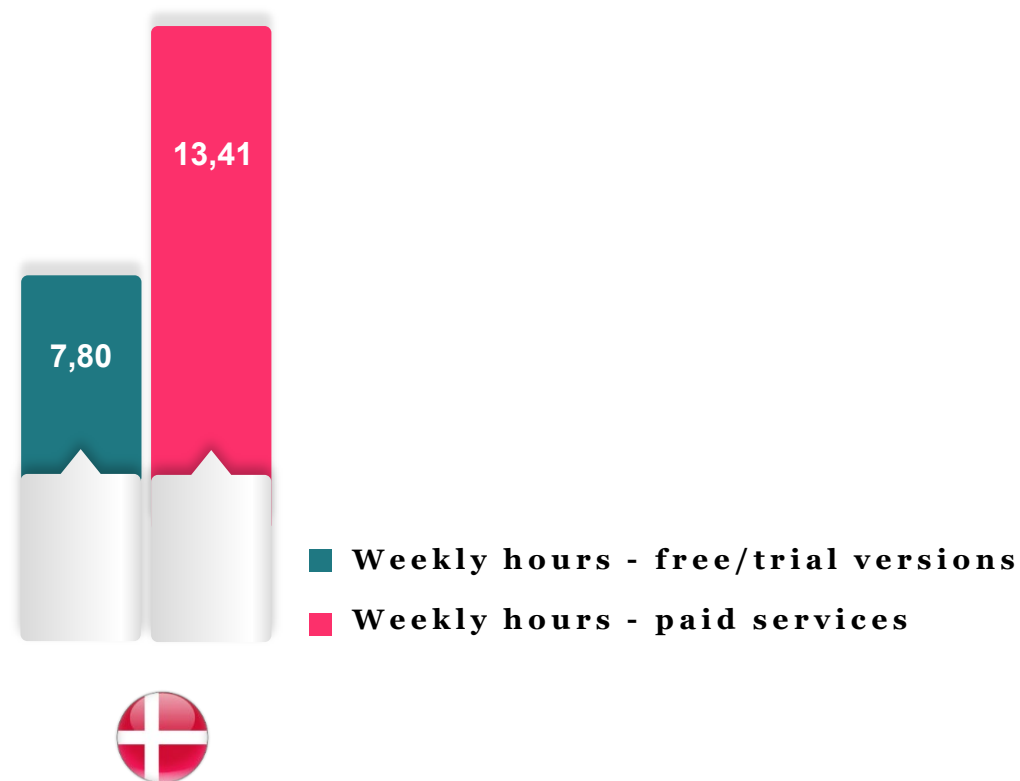


# *BRUGER KUN YT OG SOME*



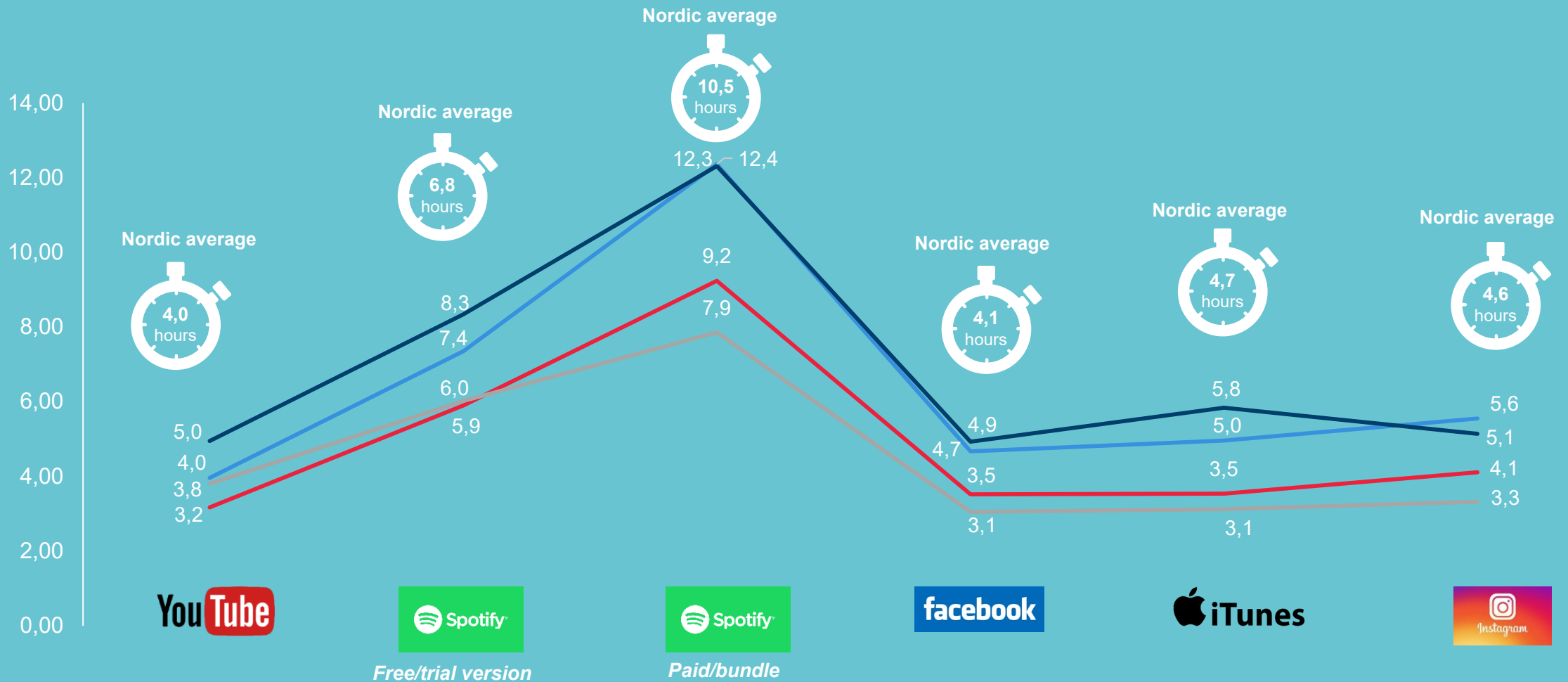
# ***HVOR STORT ER FORBRUGET?***

Lidt under halvdelen af musikforbrugerne streamede kun på gratis tjenester, men...



Weekly time spend on the top 5 audio and video services used for streaming of music

Out of the top 5 digital services used for streaming, the most time is spend on Spotify and on paid/bundle Spotify subscriptions in particular. In general, Swedes and Norwegians have a larger time consumption on the services in top 5



Q8a In a typical week, how many hours 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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***ET EKSEMPEL HVAD  
DE MANGE DATA KAN  
BRUGES TIL***

# Nordic profile of people with a paid audio streaming service

(in comparison to the general population)

Premium subscribers/bundlers

43%



Only use free/trial versions (do not have any paid subscription)

47%



Non streamers

11%



43%



- ✓ No gender differences
- ✓ 18-29 year olds and to a lesser degree 30-39 year olds
- ✓ Yearly household income of more than 700.000 DKK/SEK/NOK
- ✓ More frequent concert goers
- ✓ Favorite music genres are: Rap/Hip-Hop, Alternative & Indie, RnB/Urban, Pop, Dance & Electronic
- ✓ Much more frequent subscribers of TV/movie streaming services
- ✓ More who agree that YouTube should pay musicians for their work displayed on the digital service
- ✓ More who agree that the price for having access to all music through a paid subscription service is fair

# Nordic profile of people who only use free/trial versions of audio streaming services

(in comparison to people with a paid audio streaming service)

Premium subscribers/bundlers

43%



Only use free/trial versions

(do not have any paid subscription)

47%



Non streamers

11%



47%



- ✓ No gender differences
- ✓ More aged 50-65 and fewer aged 18-29 and 30-39
- ✓ More in the lowest and less in the highest income groups
- ✓ More Finns than Danes, Norwegians, and Swedes
- ✓ Less frequent concert goers
- ✓ Favorite music genres are: Pop, Rock, 80s music, 90s music, and Classic Rock.
- ✓ More have purchased CD's in the past 12 months
- ✓ More listen to and watch music on YouTube. More discovers new favorite songs on YouTube and on TV. More users of YouTube Music
- ✓ Spend much more listening to music on Spotify (the free/trial version)
- ✓ When choosing a music service for listening to music, many more find it important that it is free
- ✓ Fewer have a paid subscription to video streaming services. Netflix, HBO Nordic, and ViaPlay especially
- ✓ More often find and music on social media



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# *FILM OG SERIER*



# Streaming of TV/movie content – an overview of the Nordic markets

Nordic total

Has at least one TV/movie content streaming service

62%

 61%

 63%

 66%


 58%

12 hours

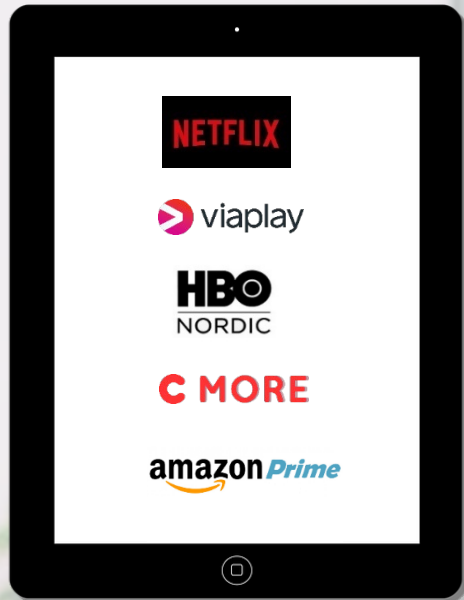
Average streaming time per week  
(among TV/movie streamers)

 11,1 hours

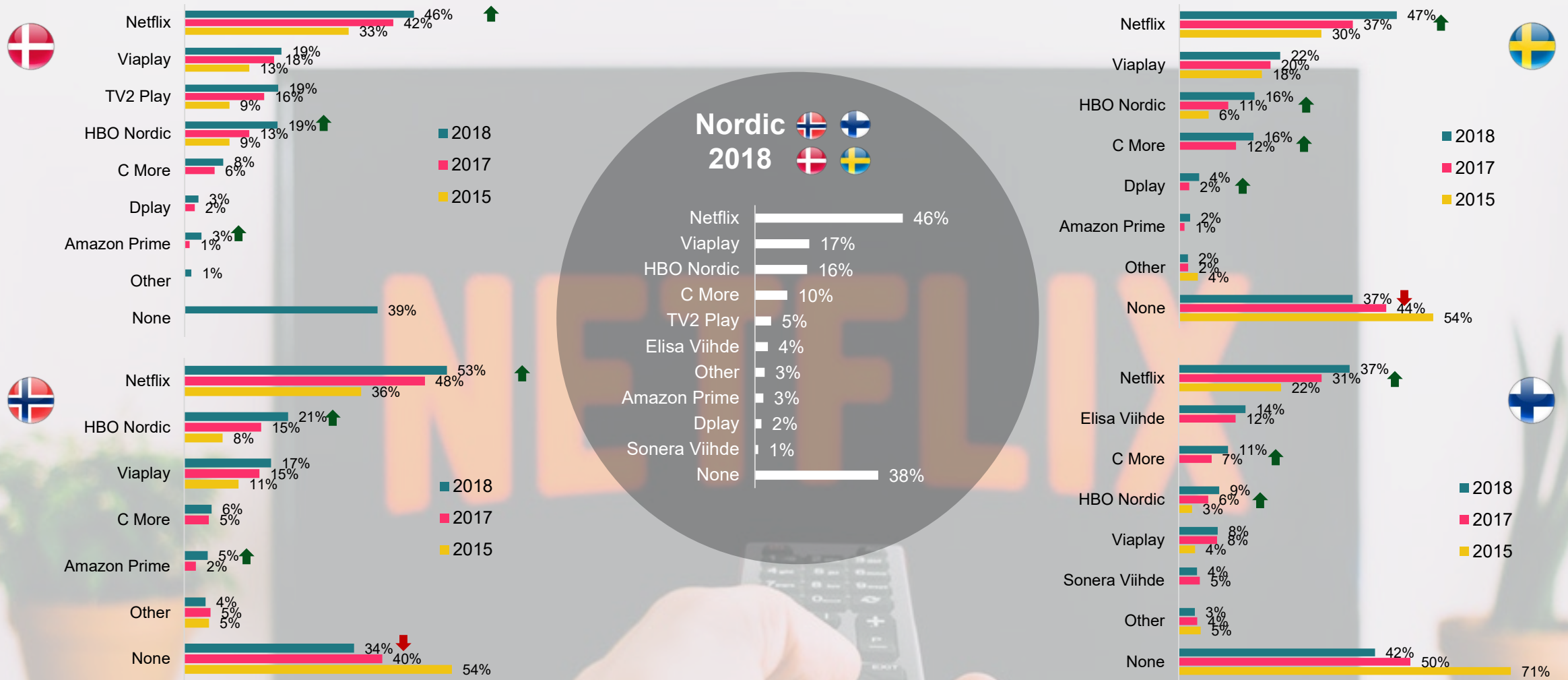
 12,7 hours

 12,4 hours

 11,6 hours



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



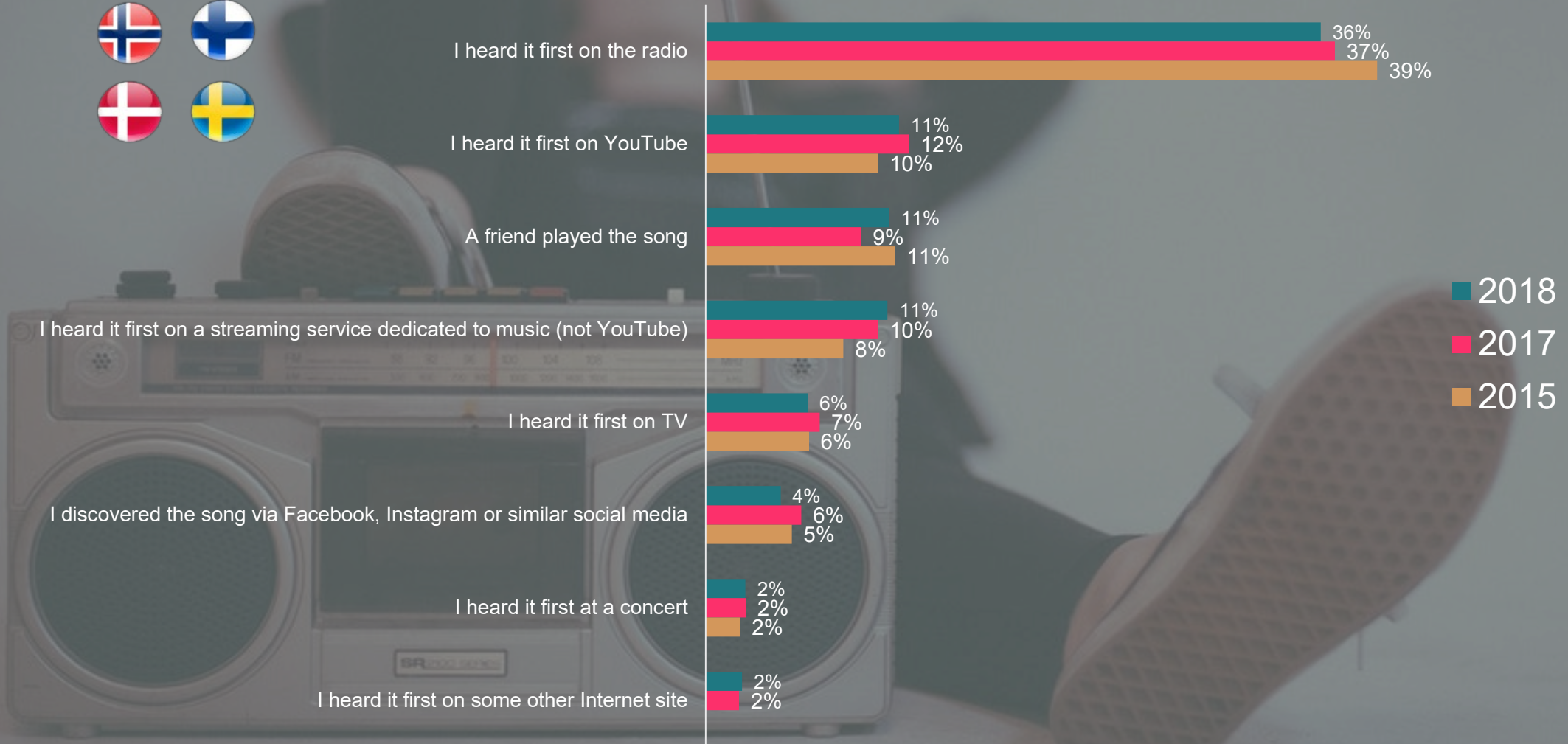
# *FLERE DATA*



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Channels where a new song was discovered – Nordic


# Radio is still the main channel for discovering new songs

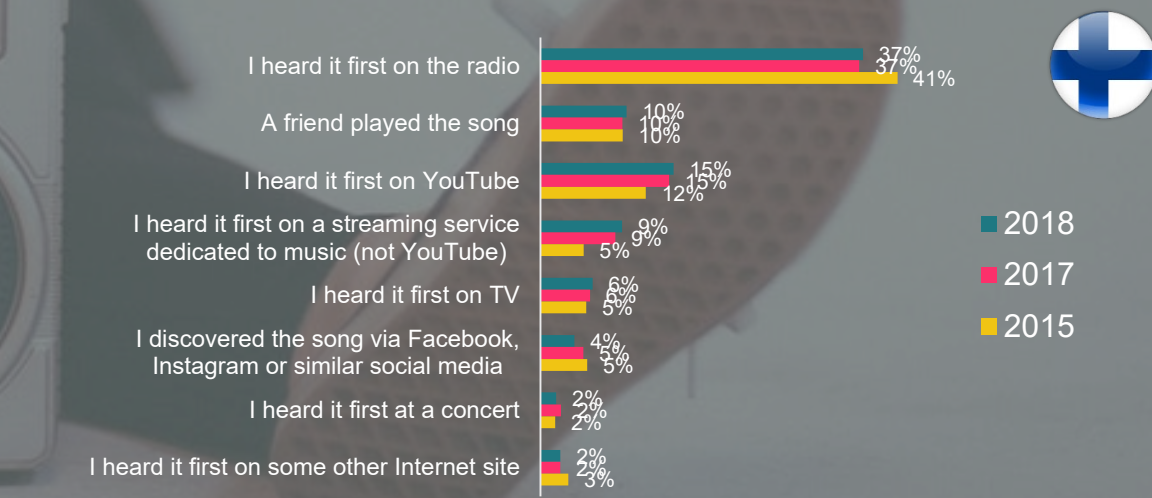
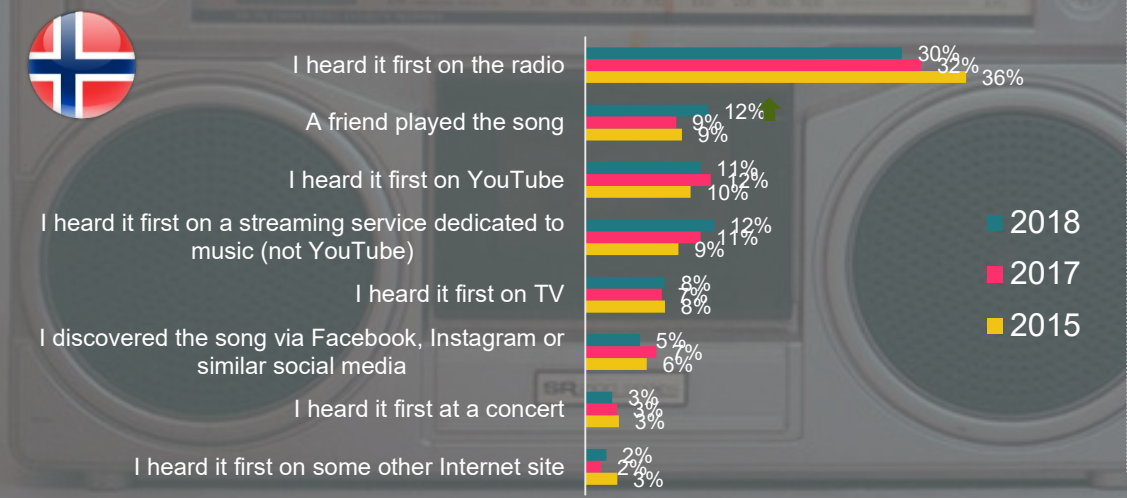
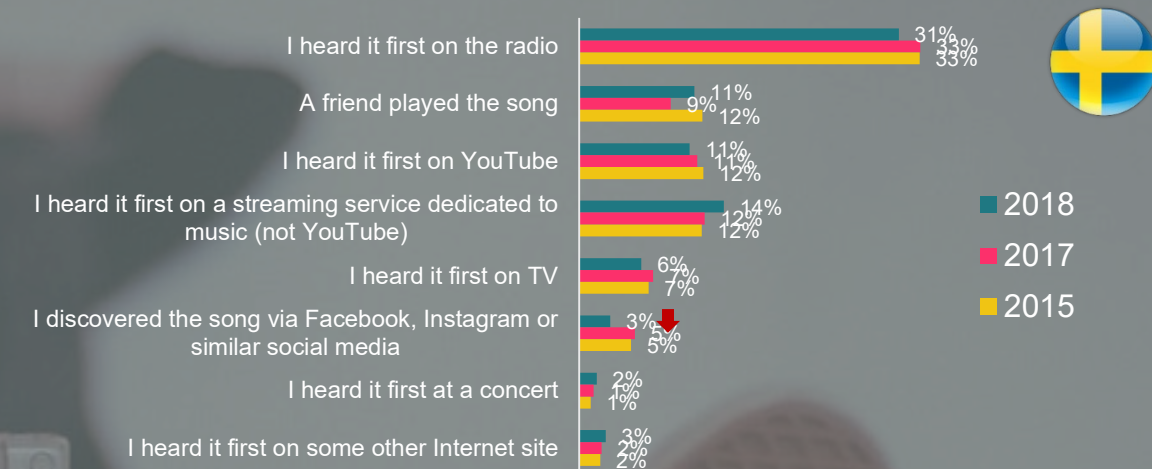
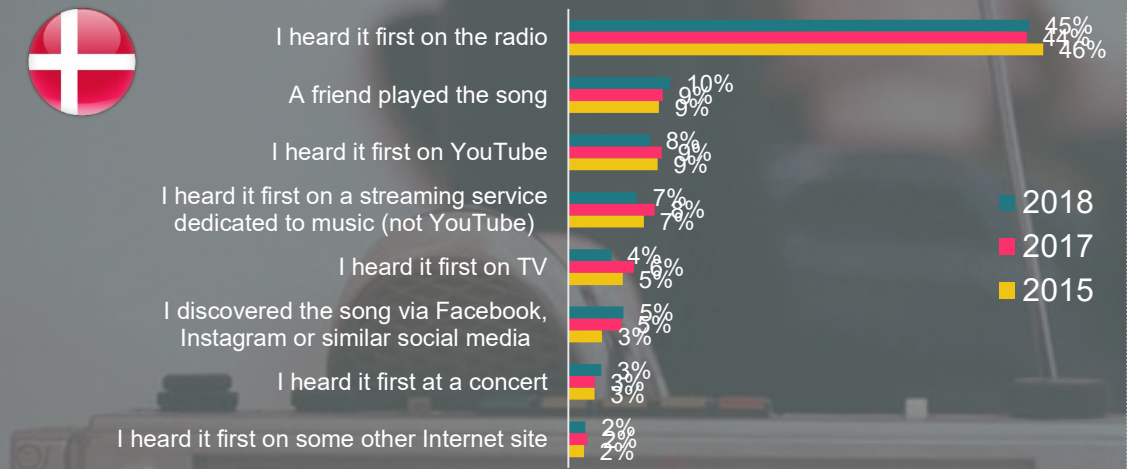


Q21 Think back to the last time you discovered a new song/piece of music you really liked: How did you discover it?  
Base: All



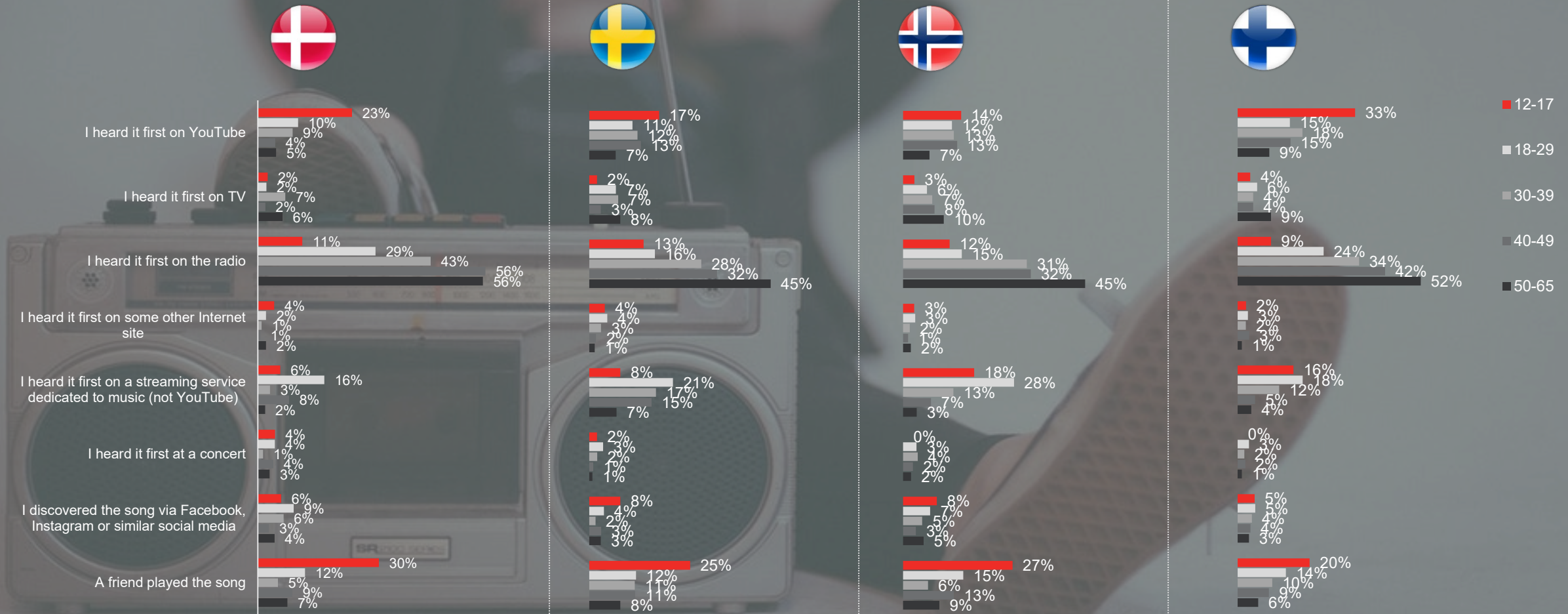
# Radio is still the main channel for discovering new songs

Significant changes from 2017 to 2018 



Channels where a new song was discovered – by age

Radio is primarily used to discover new music by people over 40 years old. Young people primarily discover new music through friends and YouTube



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

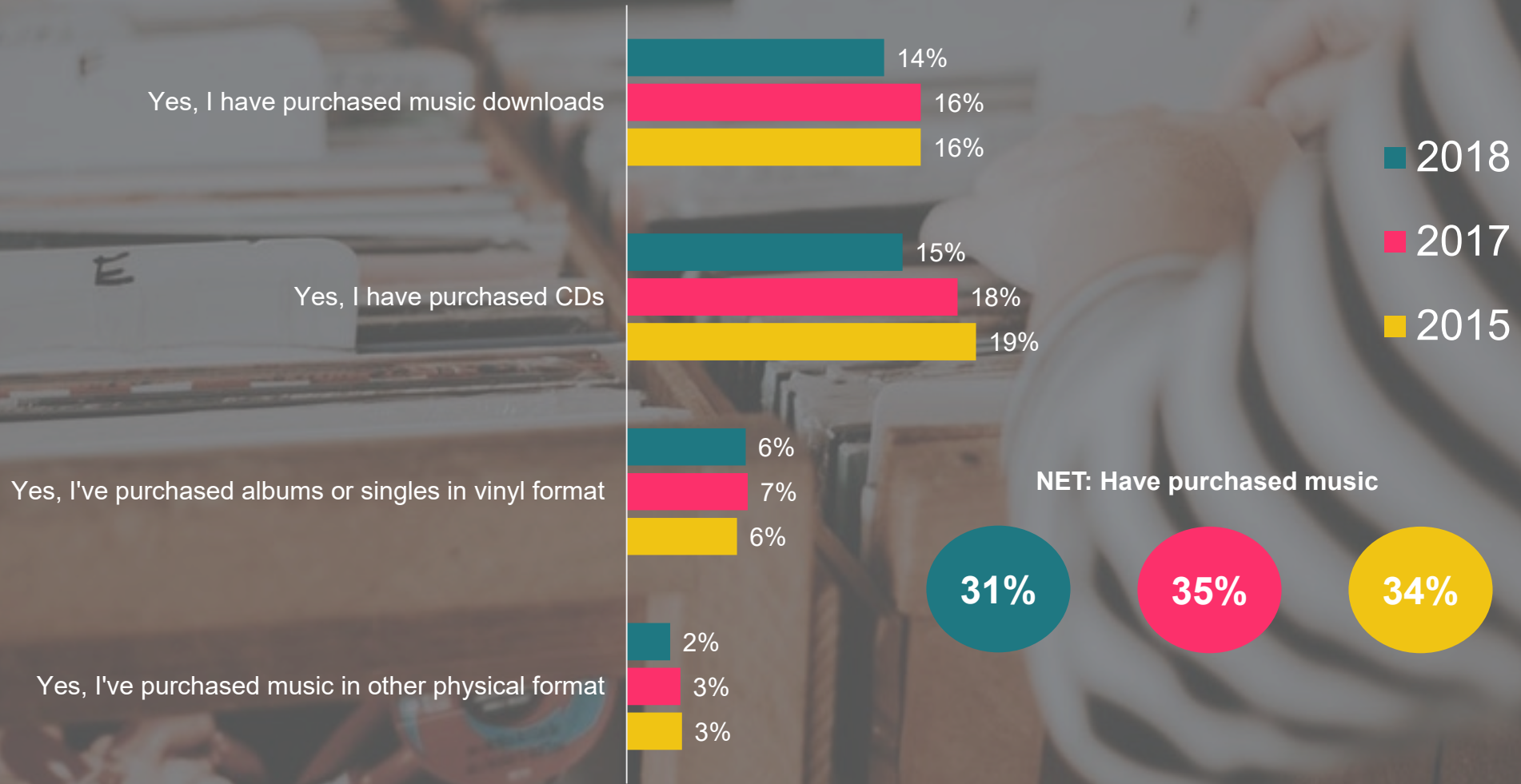


Purchase of music - Nordic

The number of people who purchase music has declined across the Nordics. It is primarily caused by fewer people purchasing CD's



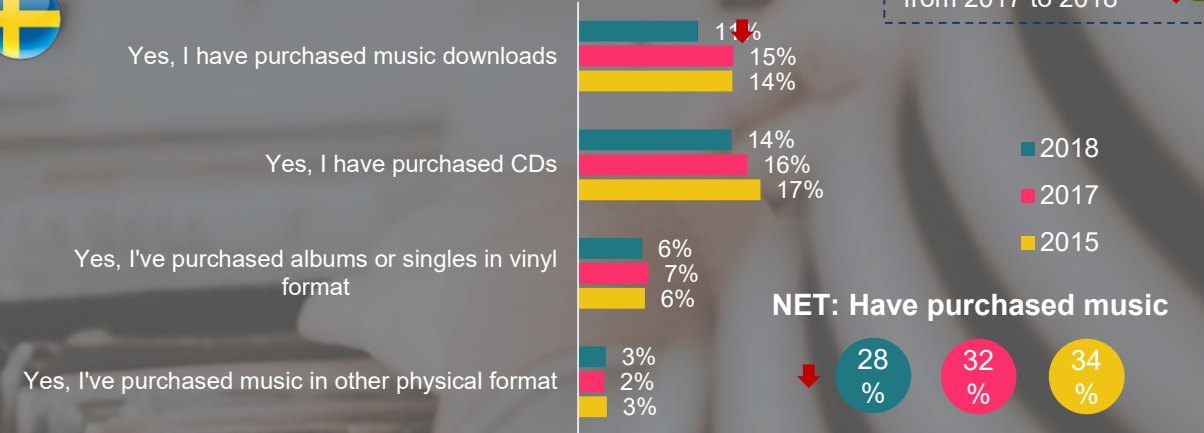
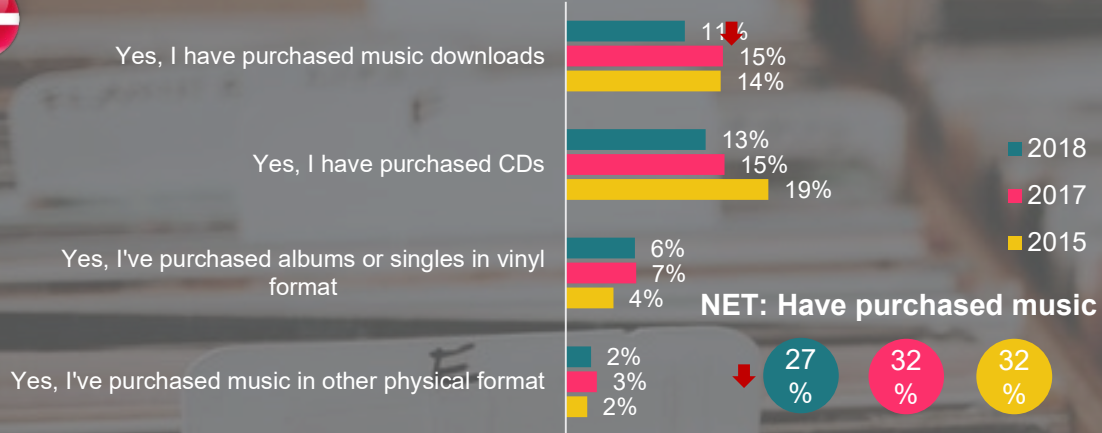
Significant changes from 2017 to 2018



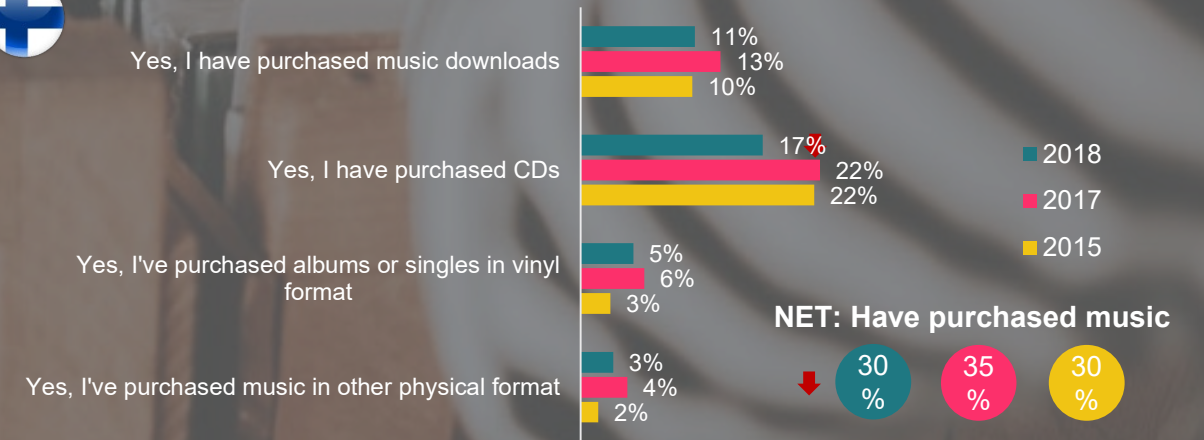
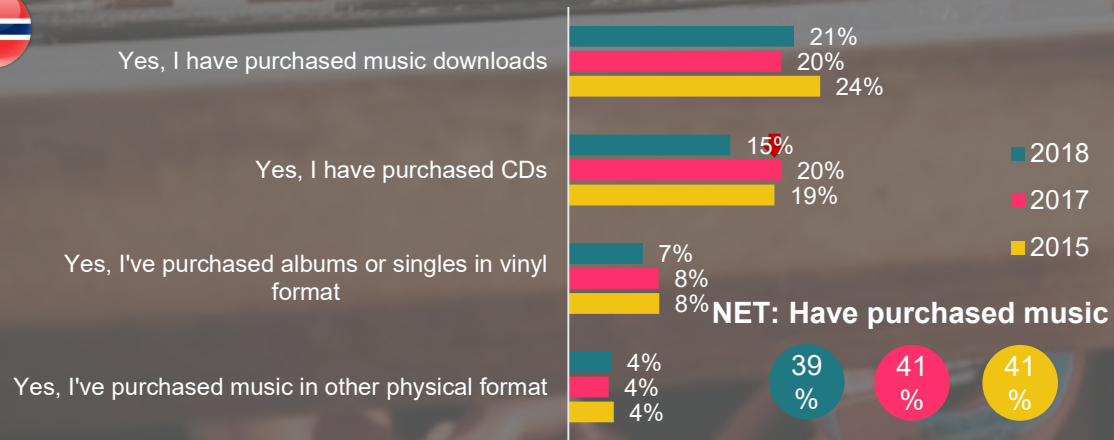
Q6 In the past 12 months, have you purchased music downloads, or music in a physical format, such as CDs or vinyl albums?  
Base: All

Purchase of music - Countries

# The number of people who purchase music has declined significantly in Denmark, Sweden, and Finland



Significant changes from 2017 to 2018 ↓↑

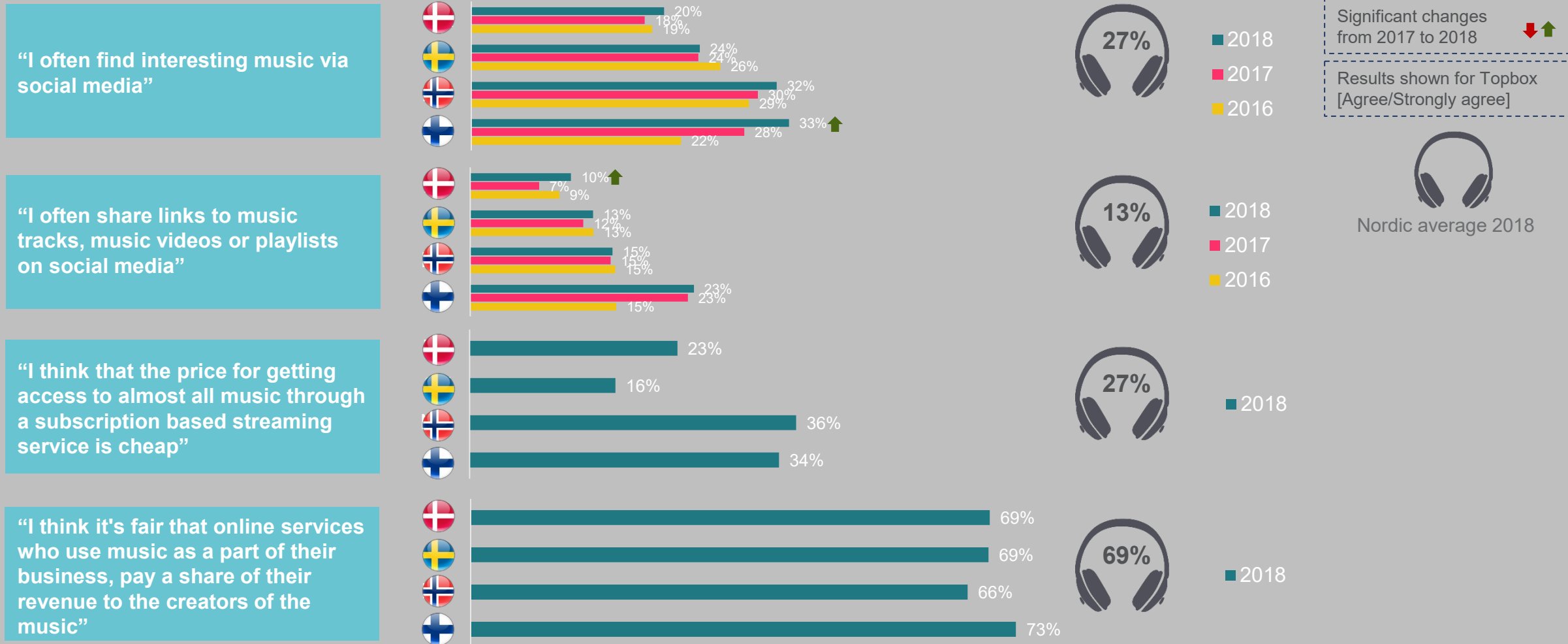


Q6 In the past 12 months, have you purchased music downloads, or music in a physical format, such as CDs or vinyl albums?  
Base: All



## Attitudes towards music and rights - Nordic and countries

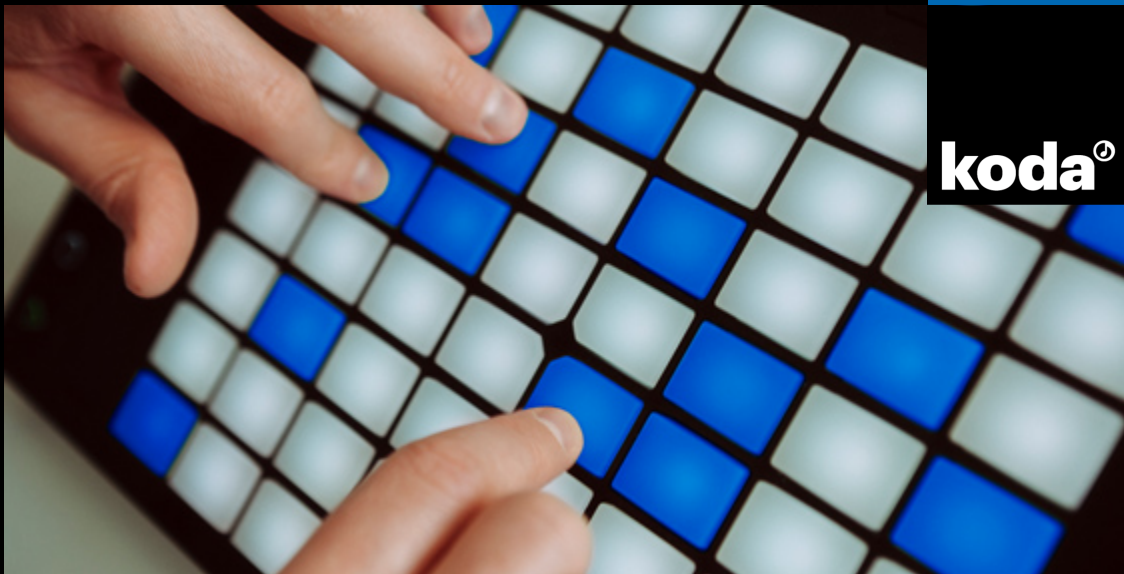
Across the Nordics, 7 in 10 agree that it is fair that online services who use music, pay a share of their revenue to the creators of the music. Compared to Sweden and Denmark, significantly more Norwegians and Finns think that the price for getting access to almost all music through a subscriptions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



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

Base: All

*STREAMINGENS  
KONSEKVENSER FOR  
HVAD VI LYTTET TIL  
- RASMUS REX*



# ***MAINSTREAM-HITS OG MINDRE DANSK***

- Top-1 procent står for lidt over 80 procent af det samlede antal streams
  
- Dansk musik kan være under pres
  - Playliste tendensen – de unge får ikke anbefalinger fra DR
  - Algoritmer dårlige til dansk musik

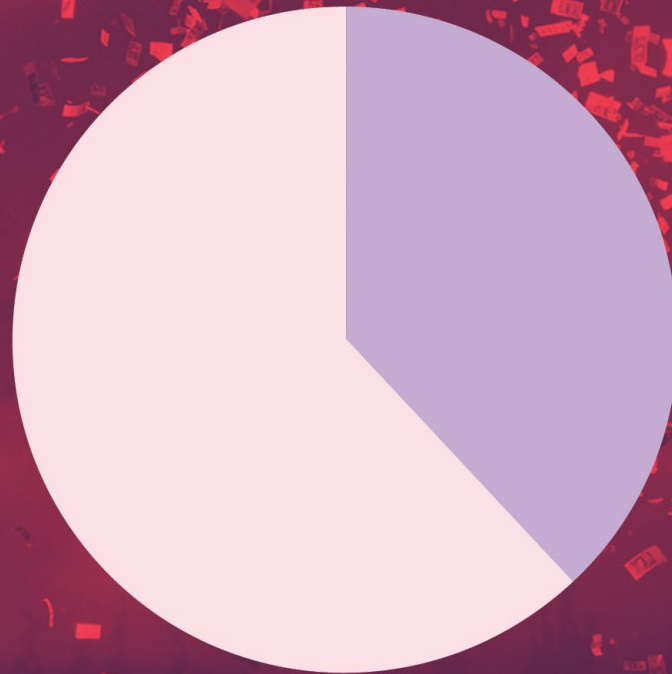
DANSK MUSIKOMSÆTNING 2017

9.304 MIO. KR



LIVEMUSIK

6.009 MIO. KR



INDSPILLET MUSIK

3.295 MIO. KR

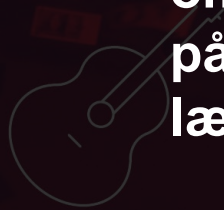
HERAF EKSPORT 890 MIO. KR



# DANSK MUSIKOMSÆTNING 2017

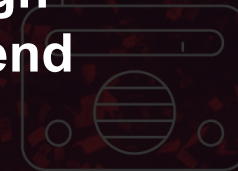
# 9.304 MIO. KR

Ifølge ny rapport steg omsætningen i musikbranchen med 23 procent, og det er i høj grad liveområdet, som driver fremgangen. Trods udfordringer på særligt området for indspillet musik er år to med vækst et tegn på, at økonomien i musikindustrien klarer sig bedre end længe, lyder det fra organisationerne bag rapporten.



LIVEMUSIK

6.009 MIO. KR



INDSPILLET MUSIK

3.295 MIO. KR

HERAF EKSPORT 890 MIO. KR

# ØKONOMIEN I MUSIKBRANCHEN 2017



## MUSIKBRANCHEN VÆKSTER

SAMLET OMSÆTNING I MUSIKBRANCHEN 2017



**9,3** MIA.  
KR

VÆKST



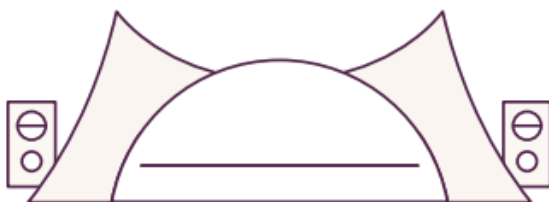
SIDEN 2016

**23%**

SIDEN 2012

**52%**

## LIVEOMRÅDET DRIVER VÆKSTEN



**6** MIA.  
KR

OMSÆTNING PÅ LIVE

**65%**

AF SAMLET OMSÆTNING

VÆKST PÅ LIVE

SIDEN 2016

**31%**

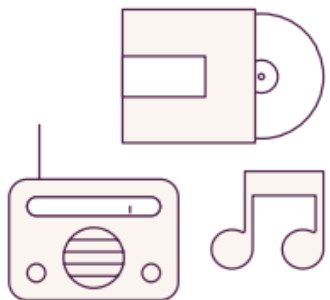
SIDEN 2012

**69%**

DE DRIVER VÆKSTEN PÅ LIVEOMRÅDET:

Store spillesteder, festivaler og artister.

## MINDRE VÆKST PÅ INDSPILLET MUSIK



### OMSÆTNING PÅ INDSPILLET

**3,3** MIA.  
KR

### VÆKST PÅ INDSPILLET

SIDEN 2016

**10%**

SIDEN 2012

**28%**

### STREAMING ER DEN STØRSTE INDTÆGTSKILDE PÅ OMRÅDET FOR INDSPILLET MUSIK MEN...

...væksten kunne have været højere, hvis ikke det digitale marked var præget af ulige vilkår for streamingtjenester og urimelige forhold for kunstnerne.



### STREAMINGS ANDEL AF INDSPILLET MUSIK

2017  
**43%**



**29%**

af det danske musikforbrug online foregår på YouTube, som ikke betaler det samme som konkurrerende tjenester.  
*Kilde: YouGov for Koda*



**35%**

ser videoer med musik på Facebook, som ikke betaler for musikken.  
*Kilde: YouGov for Koda*

### SAMTIDIG ER FYSISK SALG OG DOWNLOAD NÆSTEN FORSVUNDET

Download er faldet



**84%**

siden 2012

Fysisk salg er faldet



**76%**

siden 2012





*SE MERE  
KODA.DK/TAL*

*KONTAKT: TIV@KODA.DK*