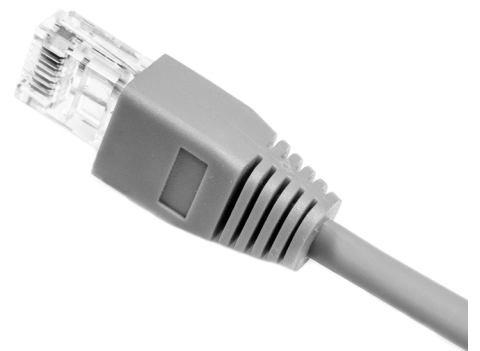




MEDIA DEVELOPMENT IN DENMARK

2016

SUMMARY AND DISCOURSE



SUMMARY AND DISCOURSE 2016

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1 Introduction

This is the third edition of the Danish Agency for Culture and Palaces' "Report on media development in Denmark" (Rapportering om mediernes udvikling i Danmark), the first of which was published in 2014. The report in 2014 laid a foundation and established a basic structure containing an extensive amount of data on media consumption and the media industry in Denmark. This has been expanded on and further developed in both 2015 and 2016.

As in previous years, this year's report has been compiled in consultation with the external editorial panel. The editorial panel consists of seven expert media professionals, researchers and industry representatives who have offered advice and suggestions regarding development and prioritisation as well as quality assurance throughout. For further information on the editorial panel, please consult the report's website under "About the report".

In this summary report, we extract, further process and put into perspective the main conclusions of this year's studies – both from new analyses of media usage in Denmark and from the special reports published in December 2015 on "Media usage on the internet – streaming, content and access", "Social media – usage, areas of interest and desire to debate" and "Media literacy in a Danish context".

For further information on the basis for the reporting and to find the basic analyses for TV, radio, newspaper/print, web traffic, internet usage and devices as well as industry and consumption, visit www.slks.dk/medieudviklingen.

2 The main points

- Age is very much the deciding factor when it comes to media usage in general and in relation to behaviour on the internet and on mobile platforms.
- In terms of **conventional media** – television, radio and printed newspapers – development in the population has, on the whole, been relatively stable in recent years. Young people have always used conventional media less than the elderly, but the difference in the media usage of young people and the elderly is growing:

Conventional TV:

- From 2014 to 2015, the daily viewing time of the **population as a whole** fell by 1 minute, and from 2010 to 2015 by 29 minutes (2010: 201 minutes a day, 2014: 173 minutes a day, 2015: 172 minutes a day)
- Among **12–18s**, daily viewing fell by 12 minutes from 2014 to 2015, and by 71 minutes from 2010 to 2015 (2010: 136 minutes a day, 2014: 77 minutes a day, 2015: 65 minutes a day)
- Among the elderly aged **71+**, daily viewing increased by 10 minutes from 2014 to 2015, while it fell by 9 minutes from 2010 to 2015 (2010: 287 minutes a day, 2014: 268 minutes a day, 2015: 278 minutes a day)

Radio:

- From 2014 to 2015, the daily listening of the **population as a whole** increased by four minutes. From 2008 to 2015, there was an overall drop of 10 minutes in daily listening.
- Among **12–18s**, the daily listening time remained the same from 2014 to 2015, but fell by 10 minutes from 2008 to 2015 (2008: 68 minutes a day, 2014: 57 minutes a day, 2015: 57 minutes a day)
- Among the elderly aged **70+**, daily listening increased by 18 minutes from 2014 to 2015, while it fell by 25 minutes from 2008 to 2015 (2008: 187 minutes a day, 2014: 144 minutes a day, 2015: 162 minutes a day)

Daily newspapers and local weekly papers:

- From 2014 to 2015, daily readership of **daily newspapers** fell from 2.054 million daily readers to 2.034 million daily readers – a drop of 20,000 readers. From 2013 to 2014, the drop was 105,000 readers, so the decline appears to have abated in recent years. From 2010 to 2015, readership fell from 2.763 million daily readers – a total decrease of 729,000 readers.
- Among **12-18s**, the reach from 2014 to 2015 fell from 26 % to 25.2 %, and from 41.6 % in 2010.
- Among the elderly aged **71+**, the reach increased from 67.6 % to 67.8 from 2014 to 2015, while it fell from 73.9 % in 2010.
- From 2014 to 2015, the **local weekly papers** experienced an overall decline in weekly readership from 2.812 million to 2.730 million weekly readers. From 2010 to 2015, weekly readership fell from 3.273 million readers – a decrease of 543,000 weekly readers.

- In terms of **media usage on the internet and use of mobile platforms**, adults and older age groups are beginning, to some extent, to acquire the media usage that young people have so readily acquired. Here, the media habits of the young and elderly are converging. However, there is still a marked difference in the media usage on the internet and on mobile platforms of the young and the elderly.

Streaming:

- From 2014 to 2015, the share of the population that streams films, series or TV programmes on a daily or almost daily basis rose from 12 % to 15 %, and the share that streams at least once a week (but not daily) rose from 15 % to 17 %.
- Among **16–24s**, the share that streams daily remains unchanged at 30 % in both 2014 and 2015, and weekly streaming is virtually unchanged, with a slight increase from 33 % to 34 %.
- For the elderly aged 65+, daily and weekly streaming remains much the same, at a very low level, but in the 55–64 age group, daily streaming has increased from 4 % to 5 % and weekly streaming from 6 % to 8 %. For 45–54s, daily streaming has increased from 7 % to 10 %, and weekly streaming from 12 % to 16 %.

Web traffic:

- **The monthly reach of the websites of the nine national daily newspapers** was 67 % among Danish internet users as a whole, 65 % among 7–18s and 63 % in the 71+ age group.
- The monthly reach of **the websites of the two national public service media** was 64 % among Danish internet users as a whole, 74 % among 7–18s and 53 % in the 71+ age group.
- In terms of **time consumption**, Danish internet users in general spent 3 hours and 7 minutes on the **websites of the national newspapers** over the course of one month. The 7–18s spent 50 minutes, while the 71+ age group spent 2 hours and 53 minutes.
- In terms of **time consumption**, Danish internet users in general spent 1 hour and 38 minutes on the **websites of the national public service media** over the course of one month. The 7–18s spent 1 hour and 19 minutes, while the 71+ age group spent 1 hour and 23 minutes.
- Seen as a whole, this development in media consumption means that media companies must cater for a range of different user groups, taking into account their vastly different habits, desires and requirements of the media, their content and accessibility.

Household consumption of the media-related items:

- Household consumption of the media-related items represents an increasing share of total household consumption – it is expensive to keep up:
 - From 1994 to 2014, the share of total household consumption represented by media-related items increased from 5.5 % to 11.9 %. Measured in DKK in real terms, there was an increase of around DKK 13,122 to DKK 20,781 per year.
 - For households with a household income of less than DKK 150,000, the share increased from 7.5 % in 1994 to 19 % in 2014. Measured in DKK in real terms, there was an increase of around DKK 9,432 to DKK 20,956 per year.

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- For households with a household income of DKK 800,000+, the share increased from 4.7 % in 1994 to 10.4 % in 2014. Measured in DKK in real terms, there was an increase of around DKK 22,028 to DKK 47,640 per year.

Ad revenue:

- There is a modest increase in ad revenue (in real terms) and, in 2015, this was just over DKK 13.2 billion compared to just under DKK 12.8 billion in 2014. However, this is still far behind the 2007 level, when ad revenue was just under DKK 16.9 billion.
 - In 2000, online advertising accounted for 3 % of the total ad revenue, and 47 % in 2015.
 - Print media accounted for 76 % of ad revenue in 2000, and 30 % in 2015.
 - Throughout this period, other electronic media and posters/outdoor advertising maintained a relatively constant share of 20–23 % of the ad revenue: 21 % in 2000 and 23 % in 2015.
- Of the total ad revenue, 26 % went to foreign companies in 2015, an increase from 3 % in 2007 (measured in real terms).
- Of the total online ad revenue, 19 % went to foreign companies in 2007, while this share rose to 56 % (measured in real terms) in 2015.
 - Measured in DKK in real terms, the share of the online ad revenue **taken by Danish companies** remains relatively constant: In 2007, the share of the online revenue taken by Danish companies was just over DKK 2.5 billion, while in 2015, the figure totalled just under DKK 2.7 billion.
 - Measured in DKK in real terms, the share of the online ad revenue **taken by foreign companies** has increased significantly: In 2007, the share of the online revenue that went to foreign companies was just under DKK 0.6 billion, while in 2015, the figure totalled just under DKK 3.5 billion.

3 The daily media consumption of 16–89s in 2015

This section will provide a brief summary of the share of the population (which, in this section, means 16–89s) using different media during the course of a day. Before reading this, please see the notes on the figures in this section, which can be found in section 9.1. These explain the methodological basis of the figures, which are derived from a number of different sources.

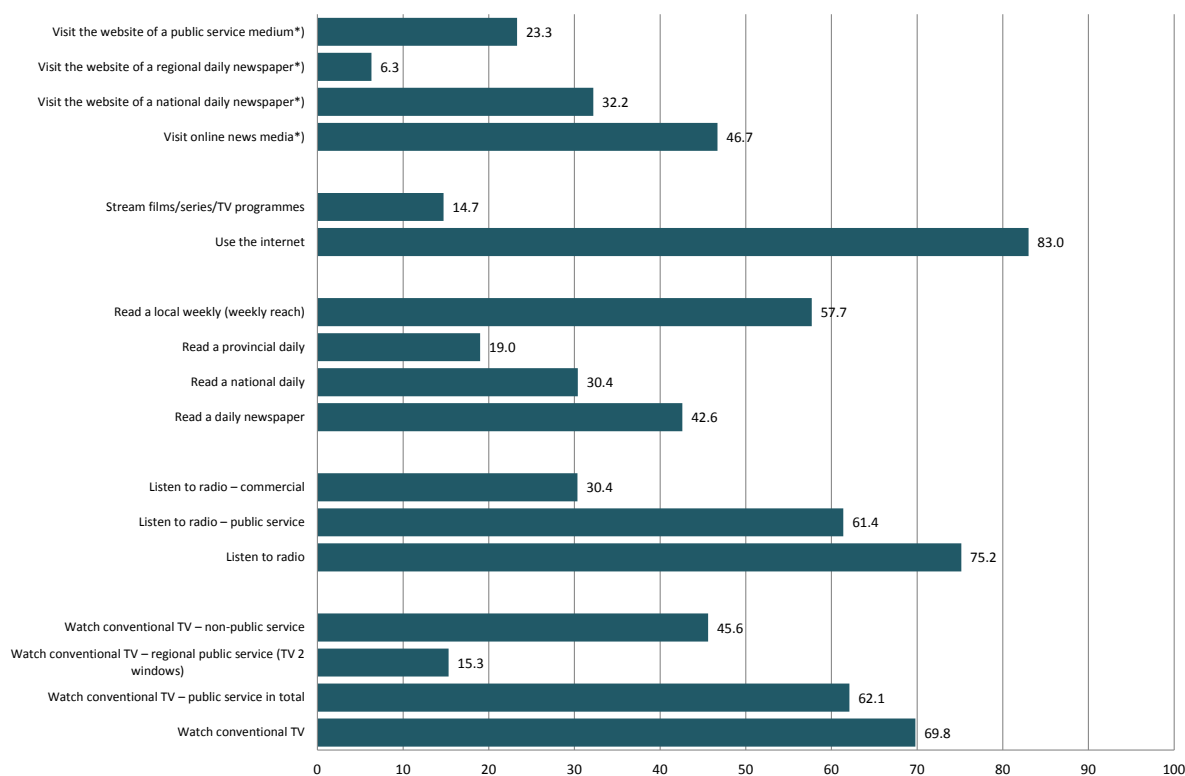
The platform used by most Danes in 2015 was the internet, which 83 % used daily or almost daily. This is a slight increase on 2014, when 81 % used the internet daily or almost daily. The level is generally high, so naturally the rates of increase are not as high as they were in the past.

However, "the internet" is a rather generic term that does not tell us much about the specific web-based media usage. The internet is a distribution channel that provides access to content, but is not in itself a media in the more classic sense. Internet usage covers a very wide range of activities, of which media usage is but one.

For example, 46.7 % of the population visited an online news medium on a daily basis (see section 10.1. below for definition of this media group), 32.2 % visited the website of a national newspaper, and 23.3 % visited the website of a public service medium.

Looking at the population as a whole, 14.7 % streamed films, series or TV programmes on a daily or almost daily basis in 2015 – an increase from 12.1 % in 2014.

Figure 1: Daily TV viewing, radio listening (daily reach %), newspaper reading (daily reach %), daily/almost daily use of the internet and streaming (%), daily use of websites (daily reach %) *) – 16–89s in 2015



Sources: TV: Gallup/TV-Meter, RADIO: Gallup/Radiometer, Daily newspapers: Index Danmark/Gallup – Annual data, Local newspapers: Lokal Index Danmark/Gallup, Internet use and streaming: Statistics Denmark – IT use in the population, Use of media websites: Gemius SA - gemiusAudience 01-2015 to 12-2015 Data processed by the Danish Agency for Culture and Palaces

Universe: 16–89s
Reach condition: 5 consecutive minutes
*) Average for the whole year

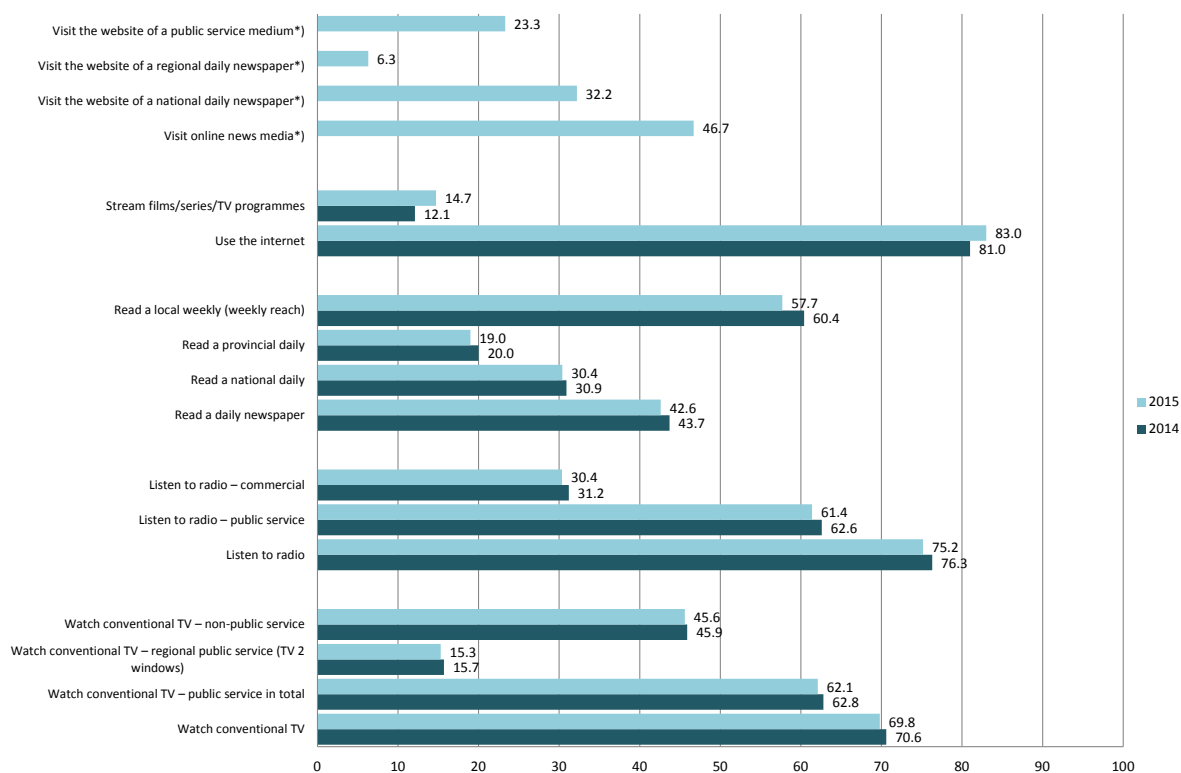
The second-most popular medium in 2015 was radio, which, with a share of 75.2 % of 16–89s who listened to the radio on a daily basis, has however suffered a slight decline compared to 2014, when 76.3 % listened daily. Behind this decline is a drop in listening to both public service radio (from 62.6 % to 61.4 %) and commercial radio (from 31.2 % to 30.4 %) from 2014 to 2015.

Conventional TV viewing was the third-most popular daily media activity in 2015, but in 2015, there is a slight fall in the share that has watched television on a daily basis compared to the previous year. In 2015, 69.8 % of the population watched at least five consecutive minutes of conventional TV, while in 2014, the figure was 70.6 %. This is a very modest decline, and a large share of the population still watched conventional TV every day in 2015.

42.6 % of the population read a printed newspaper every day in 2015. This is a decrease of 1.1 percentage points compared to 2014, when 43.7 % read a printed newspaper on a daily basis. This decrease is not as large as from 2013–2014, i.e. 2.3 percentage points, when 46 % read a daily newspaper in 2013.

The overall summary for 2015 is shown in Figure 1 above, while the development from 2014–2015 can be seen in Figure 2 below.

Figure 2: Daily TV viewing, radio listening (daily reach %), newspaper reading (daily reach in %), local weekly papers (weekly reach in %), daily/almost daily use of the internet and streaming (%), daily use of websites (daily reach in %) *) – 16–89s in 2014 and 2015



Sources: TV: Gallup/TV-Meter, RADIO: Gallup/Radiometer, Daily newspapers: Index Danmark/Gallup – Annual data, Local newspapers: Lokal Index Danmark/Gallup, Internet use and streaming: Statistics Denmark – IT use in the population, Use of media websites: Gemius SA - geniusAudience 01-2015 to 12-2015
Data processed by the Danish Agency for Culture and Palaces

Universe: 16–89s
Reach condition: 5 consecutive minutes
*) Average for the whole year

4 Media development is happening at lightning speed... or is it? Age plays a major role.

Summary 2014 reported that the media are in a period of constant change, driven in particular by technological advances and the widespread use of the internet in Denmark. Internet speeds are increasing, mobile data traffic is growing, and household ownership of different devices for media usage is on the rise. Along with price trends in the field, these media developments have paved the way for new ways of producing, publishing and using media. This has meant that, over the years, the media market has undergone – and is still undergoing – structural changes.

Bearing these factors and some areas of public debate in mind, one might get the impression that the conventional media are poised to disappear within a few years. But this is probably not quite the case. We will now show part of the picture in relation to media development and thus provide an indication of the direction in which developments may be headed.

As shown in the chapters of the Report on media development in Denmark in 2016 and this Summary and discourse, there are appreciable differences between the development of media consumption in the population as a whole and in different population groups. So not all media are affected in the same way or to the same extent by development.

In the two previous basic reports and in the Danish Agency for Culture and Palaces' special reports on "Media usage on the internet – streaming, content and access" and "Social media – usage, areas of interest and desire to debate", published in December 2015, age was shown to be very much the deciding factor when it comes to media usage in general and in relation to behaviour on the internet.

In this year's report, we have therefore chosen to focus on both a relatively young age group and a relatively elderly age group in a number of areas in order to show how different media habits evolve. As a result of this development, the media have to cater for some vastly different user groups with very different media behaviour and requirements.

4.1 TV

In 2015, television viewers in Denmark watched conventional television daily for almost as long as they did in 2014. The average daily viewing of conventional television fell by just one minute from 173 minutes in 2014 to 172 minutes in 2015. In the population as a whole, the situation is much the same from 2014–2015. Compared with 2010, which, at 201 minutes a day, is the year when the most conventional TV was watched in Denmark, there has been a drop of almost half an hour. This said, at 2 hours and 52 minutes of daily TV viewing, the 2015 level is still high, and you have to go back to 2008 to find lower levels (167 minutes daily).

The development of conventional TV viewing might seem to be moving relatively slowly, but the picture is quite different if you look at the development in the different age groups. As Table 1 below shows, with the exception of children aged 3–11, there is a clear correlation between conventional TV viewing and age: The older the viewer, the more time they spend watching television on a daily basis. This correlation also seems to have been reinforced in recent years.

In 12–18s, conventional TV viewing has *fallen* by 12 minutes a day in the past year, while in those aged 71+, it has *increased* by 10 minutes. If you compare this with 2010, when our TV viewing peaked, this is a very significant development: The viewing of 12–18s has fallen by 71 minutes, corresponding to a drop of just over 52 % in daily viewing of conventional television. In the oldest age group of 71+, television viewing fell by just 9 minutes or 3.1 % in the period from 2010–2015, while that of 55–70s increased by 7 minutes, corresponding to 3 %.

Table 1: Conventional TV viewing: Average daily time consumption in minutes in 2010, 2014–2015 and age

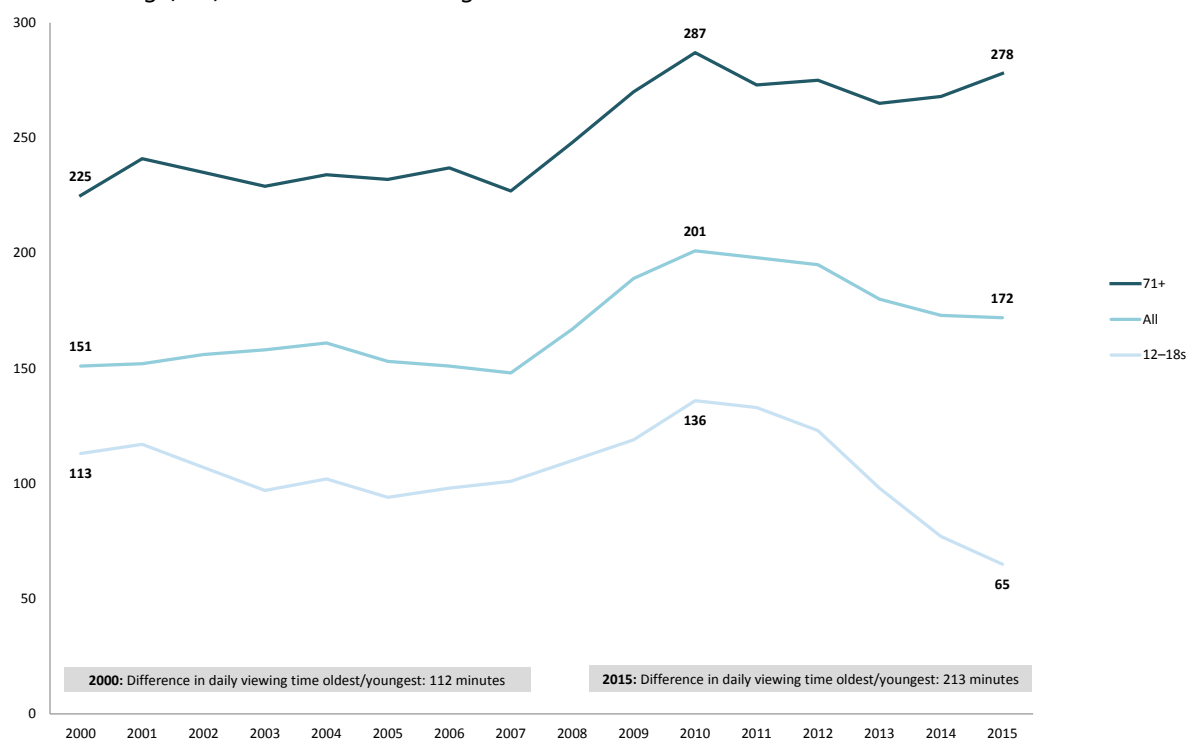
	Minutes			Difference in minutes		Difference in %	
	2010	2014	2015	2014–2015	2010–2015	2014–2015	2010–2015
All	201	173	172	-1	-29	-0.6 %	-14.4 %
3–11s	120	88	81	-7	-39	-8.0 %	-32.5 %
12–18s	136	77	65	-12	-71	-15.6 %	-52.2 %
19–34s	202	157	151	-6	-51	-3.8 %	-25.2 %
35–54s	206	170	167	-3	-39	-1.8 %	-18.9 %
55–70s	233	236	240	4	7	1.7 %	3.0 %
Aged 71+	287	268	278	10	-9	3.7 %	-3.1 %

Source: TNS Gallup/TV-Meter, data processed by the Danish Agency for Culture and Palaces

Universe: The Danish population aged 3+

Figure 3 below, which covers the period from 2000–2015, shows that 12–18s have always watched less conventional TV than the oldest age group. However, up until 2011, the development in the two age groups was more or less the same, but from 2011, and particularly from 2012 onwards, the conventional TV viewing of the two age groups has developed in vastly different directions. The development is mainly driven by the fact that the viewing of 12–18s is falling, while in those aged 71+, it remains relatively stable, with an upward trend in recent years. Where, in 2000, there was a difference of 112 minutes in the daily viewing time of the two age groups, in 2015, the difference is 213 minutes – quite a significant development.

Figure 3: TV viewing: Average daily time consumption on conventional TV in minutes – 2000–2015 and age, all, 12–18s and those aged 71+



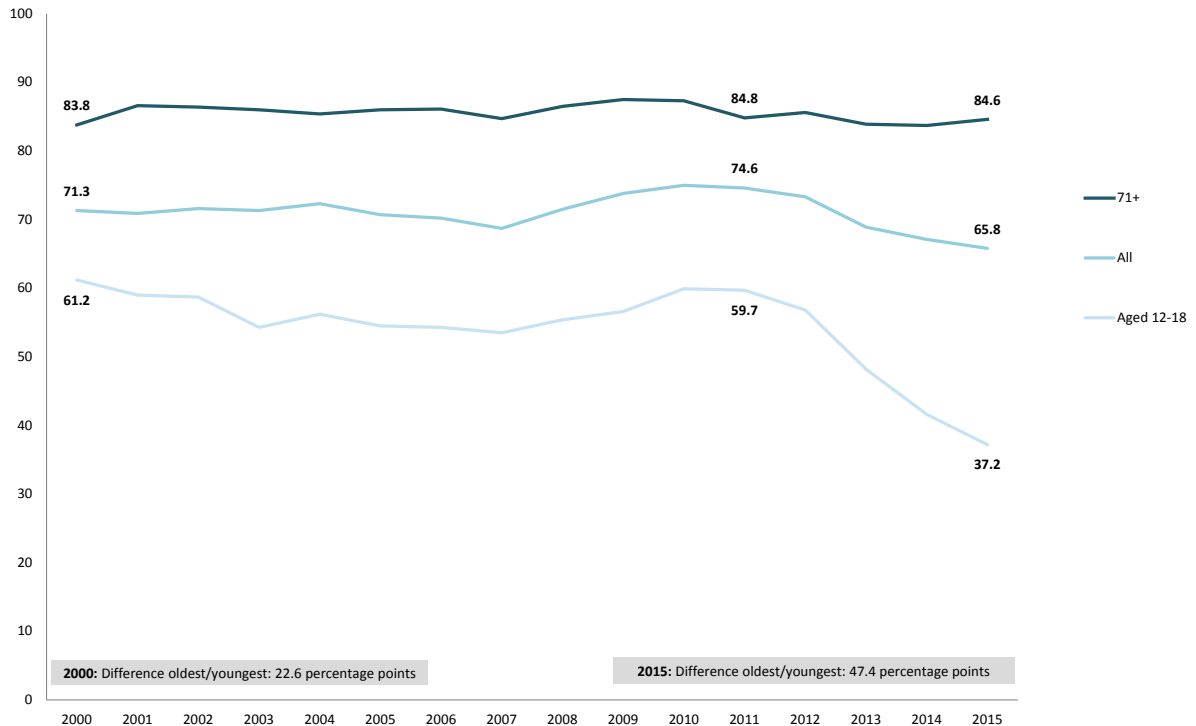
Source: TNS Gallup/TV-Meter
 Data processed by the Danish Agency for Culture and Palaces

Universe: The Danish population aged 3+

In addition to looking at the average daily viewing time of the different age groups, it is also relevant to look at the reach or scope of the conventional TV viewing in the population. The reach is a cumulative figure that shows the share of the population that has watched at least five consecutive minutes of conventional TV in the course of a day (average daily reach) or week (average weekly reach). This is shown in Figure 4 and Figure 5 below.

As the figures show, both the daily and weekly reach are consistently high throughout the period from 2000–2015 in the oldest age group (71+), while in the youngest age group (12–18s) from 2011 onwards, there is quite a significant drop in reach, especially on a daily basis, so the daily reach in 2015 is just over 37 % in the young age group. Looking at the weekly figures, despite the decline since 2011, 75 % of 12–18s have watched conventional TV for at least five consecutive minutes.

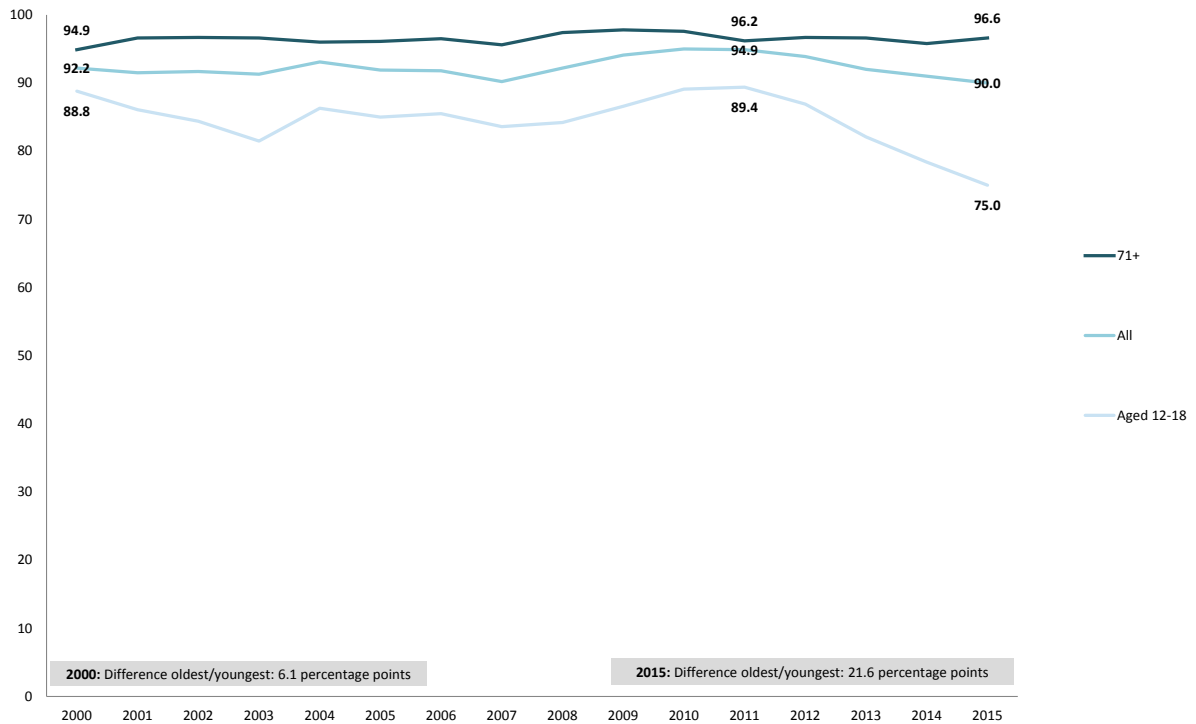
Figure 4: Conventional TV viewing: Average daily reach in % (AvRch%), 2000–2015. All, 12–18s and 71+



Source: TNS Gallup/TV-Meter
Data processed by the Danish Agency for Culture and Palaces

Universe: The Danish population aged 3+
Reach condition: 5 minutes' consecutive viewing

Figure 5: Conventional TV viewing: Average weekly reach in % (AvWkRch%), 2000–2015. All, 12–18s and 71+



Source: TNS Gallup/TV-Meter
Data processed by the Danish Agency for Culture and Palaces

Universe: The Danish population aged 3+
Reach condition: 5 minutes' consecutive viewing

In a comparison of the number of 12–18s who watched conventional TV during a 24-hour period in 2010 and 2015 respectively, this age group now switches away least from about 8 pm (at which time about 40 % fewer 12–18s watch TV) and most in the afternoons at 2 pm (where about 70 % fewer 12–18s watch TV).

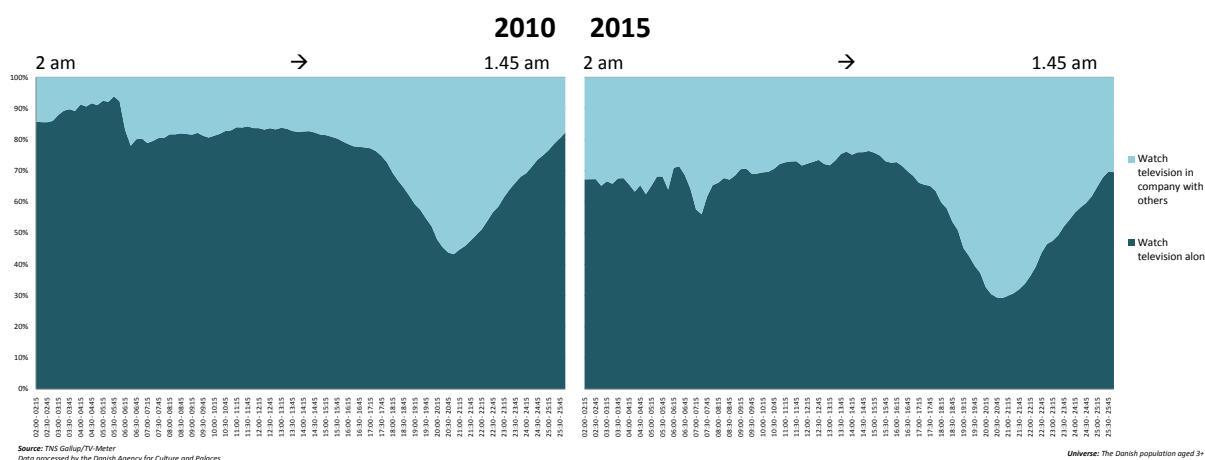
If we compare the share of 12–18s who watched conventional TV either alone or in company in 2010 with the corresponding figures for 2015, we see that a greater share of this age group's conventional TV viewing in 2015 took place in company with others than in 2010. See Figure 6 below.

The two small graphs (for 2010 and 2015, respectively) show how great a share of viewers watch TV either alone (dark blue block at the bottom of the graph) or in company with others (light blue block at the top of the graph) at different times of day (from 02.00–01.45). The light blue zone, representing viewing in company, is larger in the 2015 graph than in the graph for 2010. Calculated as a daily average, in 2010, 66 % watched TV alone and 34 % watched TV in company with others. In 2015, 51 % watched conventional TV alone and 49 % with others.

Some of the time spent watching TV alone that was part of conventional TV flow in 2010 may now have shifted to streaming alone from a variety of streaming services (such as Netflix and YouTube) on either a smartphone or tablet, although this is not captured by TV measurement data.

12–18s' conventional TV viewing has fallen dramatically from 2010 to 2015. However, when they did watch conventional TV in 2015, this was more often a social activity than in 2010, i.e. something they did with others.

Figure 6: Conventional TV viewing: Percentage share of 12–18 year old viewers, who watched TV on weekdays (Monday–Friday) alone or in company with others by time of day – A comparison between 2010 and 2015



In addition to the general development of conventional TV viewing among the younger and older age groups, respectively, it is also relevant to note the development in the share of pub-

lic service TV, which in 2015 is just over 58 % and therefore still accounts for more than half of the Danes' total TV viewing.

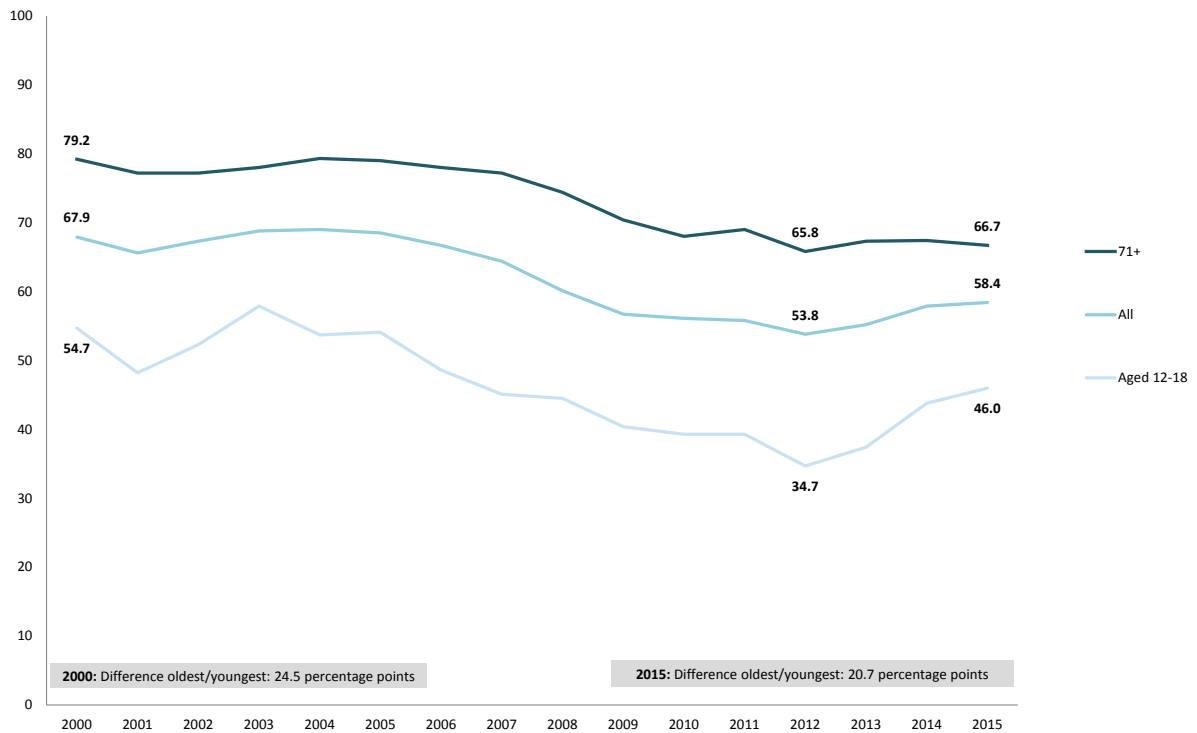
As we saw in Figure 3 to Figure 5 above, there has been a relatively significant drop-off in conventional TV viewing among 12–18s in recent years. However, the share represented by public service television in this age group's conventional TV viewing has risen.

Since 2012, when public service television accounted for the lowest share of viewing among 12–18s (34.7 %), public service television has increased its share to 46 % in 2015. *When* 12–18s watch conventional TV, they watch more public service television than they did a few years ago.

However, the oldest age group still has a higher public service share (66.7 % in 2015) than the young, but the difference between the two age groups has narrowed, and only once in the entire period from 2000 to 2015 was it lower than in 2015, when the difference was 20.7 percentage points (in 2007, the difference in public service share between the two age groups was 20.1 percentage points).

Contrary to public service television trends, 12–18s watch less non-public service television. In 2015, non-public service television accounted for almost 39 % of Danish TV viewing, but 50.4 % of 12–18s' viewing and 30.4 % of the viewing of the elderly age group. Here, too, the difference between the two age groups has narrowed in recent years, and at no time since 2000 has it been lower than in 2015 (20 percentage points). The development in the period from 2000–2015 is shown in Figure 7 and Figure 8 below.

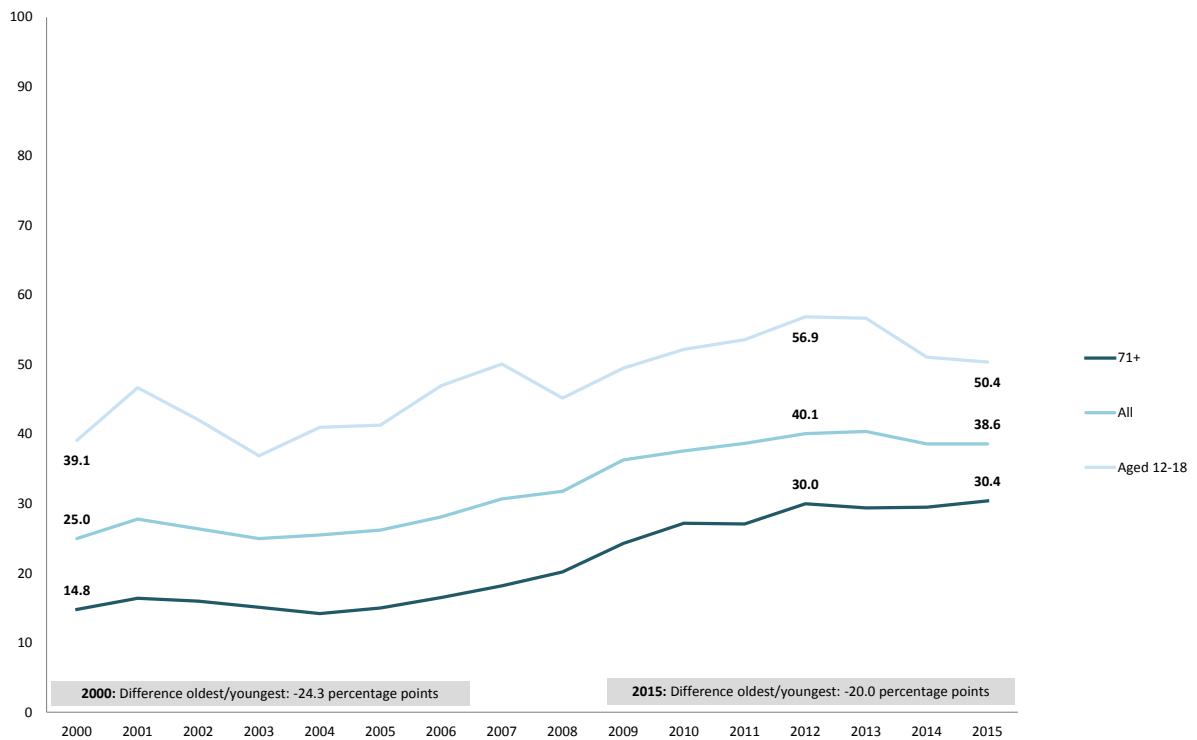
Figure 7: Public service television: Share in % of viewing and age. All, 12–18s and 71+



Source: TNS Gallup/TV-Meter
 Data processed by the Danish Agency for Culture and Palaces

Universe: The Danish population aged 3+

Figure 8: Non-public service television: Share in % of viewing and age. All, 12–18s and 71+



Source: TNS Gallup/TV-Meter
 Data processed by the Danish Agency for Culture and Palaces

Universe: The Danish population aged 3+

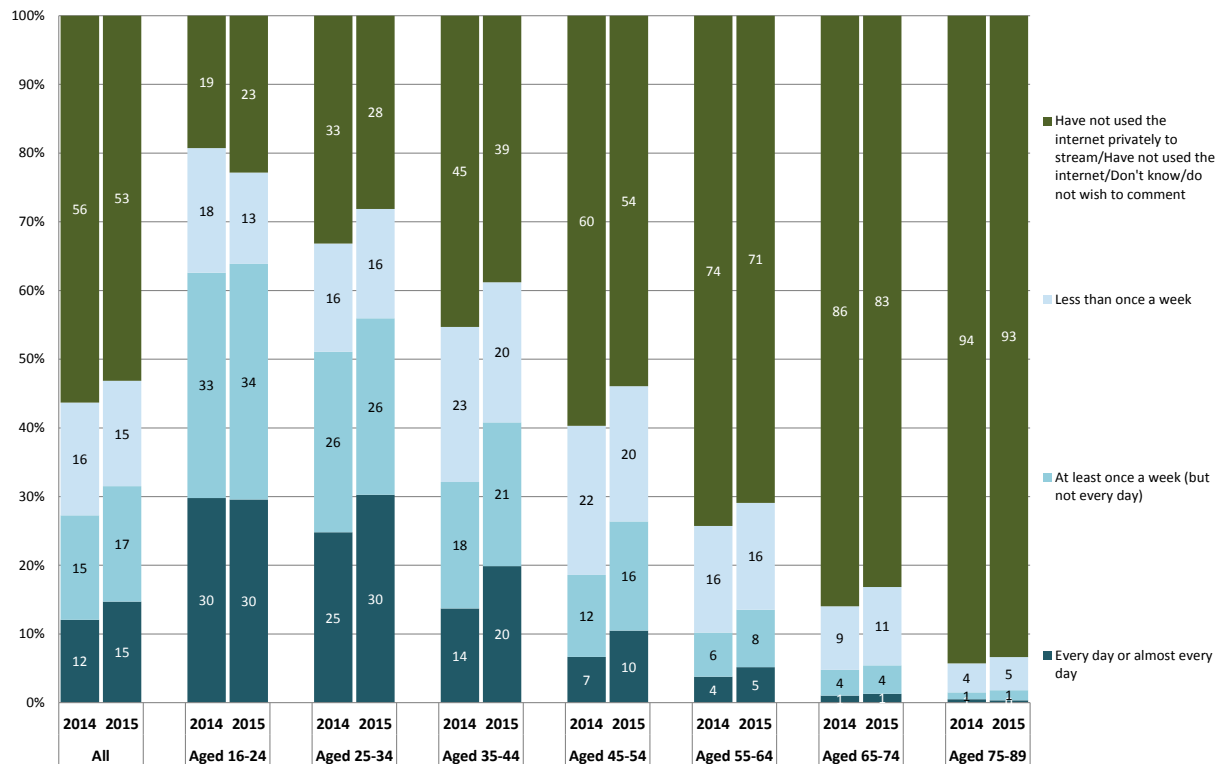
As yet, industry-recognised measurements of TV viewing provide no or only very limited figures for the scale of viewing on platforms other than conventional TV. However, Statistics Denmark's study of IT usage in the population tells us how often people streamed films, series and TV programmes in 2015. Here, we see a complete reversal in age distribution compared to conventional TV viewing: The youngest age group streams the most.

The figures shown in Figure 9 below are calculated on the basis of questions about use of the internet over the past three months, and whether and how often the respondents stream. The figures do not say anything about *how much time* they spend streaming, but *how often* they stream. So we know that conventional TV viewing is on the decline, but we do not actually know whether the total viewing of audiovisual content is increasing.

In the population as a whole (16–89s), just under 15 % streamed films, series or TV programmes daily or almost daily in 2015, as opposed to just over 12 % in 2014. In addition, almost 17 % stream on a weekly basis (just over 15 % in 2014). In the youngest age group – the 16–24s – there has been no change in how many people stream daily or almost daily. Around 30 % in both 2014 and 2015.

Slightly more people stream at least once a week: 34.3 % compared to 32.8 %. The largest increase from 2014 to 2015 in the share that streams films, series or TV programmes daily is seen in the 35–44 age group (from 13.7 % to 19.9 %) and 25–34s (from 24.8 % to 30.3 %). The 16–24s remain the age group that streams films, series or TV programmes most frequently, and there is still a clear correlation between streaming and age: The older the person, the more rarely he or she streams. However, from 2014 to 2015, several of the other age groups showed a significant increase in the share that streams either daily or weekly.

Figure 9: How often do you stream films, series or TV programmes? Distribution by age group (%) – 2014–2015



Source: Statistics Denmark/IT use in the population 2014 and 2015
Data processed by the Danish Agency for Culture and Palaces

Universe: The Danish population aged 16-89

Read more about TV viewing in the report's chapter on TV.

4.2 Radio

In 2015, for the first time since the current measurements of radio listening in Denmark began in 2008, there was an increase in the average daily listening time. Throughout the period from 2008 to 2014, daily listening fell continuously, and the overall decline in the period was a total of 15 minutes. From 2014 to 2015, the trend reversed and listening increased – for a while at any rate. As with television, there are differences in how listening has evolved in the different age groups, although the trend is perhaps not entirely parallel with television trends. Where the oldest age group has shown an increase in both TV viewing and radio listening, the young have shown a sharp decline in TV viewing but maintained the time spent listening to the radio.

Where, for television, the 12–18s showed the most significant development in consumption, for radio, it is the oldest age group that showed most often relatively large fluctuations in the daily listening time in the period from 2008–2015. From 2010 to 2011, the daily listening of this age group fell by 11 minutes (-6.3 %), from 2011 to 2012 by 7 minutes (-4.2 %) and from 2013 to 2014 by 10 minutes (-6.6 %).

So, over the period from 2008–2014, the daily listening of the 70+ group fell by a total of 43 minutes (-23.1 %). However, from 2014 to 2015, the daily listening of this age group *increased* by no fewer than 18 minutes (+12.8 %), making the oldest age group the biggest consumers of radio once again, with 162 minutes of daily listening in 2015.

From 2014 to 2015, there has been an increase to a greater or lesser extent in daily radio listening in all age groups, with the exception of the 19–34s, where it has fallen by 3 minutes or 2.9 %. Looking at the period from 2008–2015 as a whole, the 19–34s also show the largest overall decrease in daily radio listening, with a relative decline of 19 % (21 minutes). The largest decrease in the period in terms of minutes is, however, seen in the 70+ age group, with a drop of 25 minutes per day, corresponding to a decrease of 13.3 %.

The development in the oldest age group's listening habits from 2008–2015 might be related to DR's abandonment of FM4 in 2011 and the new channel strategy, which meant, following restructuring, that P1 and P2 would share an FM frequency or could be listened to on DAB. In connection with abandoning FM4 to Radio24syv, DR's total share from 2011 to 2012 fell among the oldest more than Radio24syv's share increased in the age group in that period. This may have contributed to an overall decrease in the listening of the oldest age group.

In addition, DR made a number of channel reforms and moved several major programmes with many listeners in the older age group to other channels. These listeners may have taken a while to follow suit.

Table 2: Average daily radio listening time in minutes in 2008, 2014 and 2015 and age

	Minutes			Difference in minutes		Difference in %	
	2008	2014	2015	2014–2015	2008–2015	2014–2015	2008–2015
All	131	116	121	4	-10	3.7 %	-7.9 %
12–18s	68	57	57	0	-10	0.5 %	-15.4 %
19–34s	108	90	87	-3	-21	-2.9 %	-19.0 %
35–54s	134	120	124	4	-10	3.7 %	-7.2 %
55–69s	153	154	160	6	7	3.6 %	4.6 %
Aged 70+	187	144	162	18	-25	12.8 %	-13.3 %

Source: TNS Gallup/Radio-Meter, data processed by the Danish Agency for Culture and Palaces

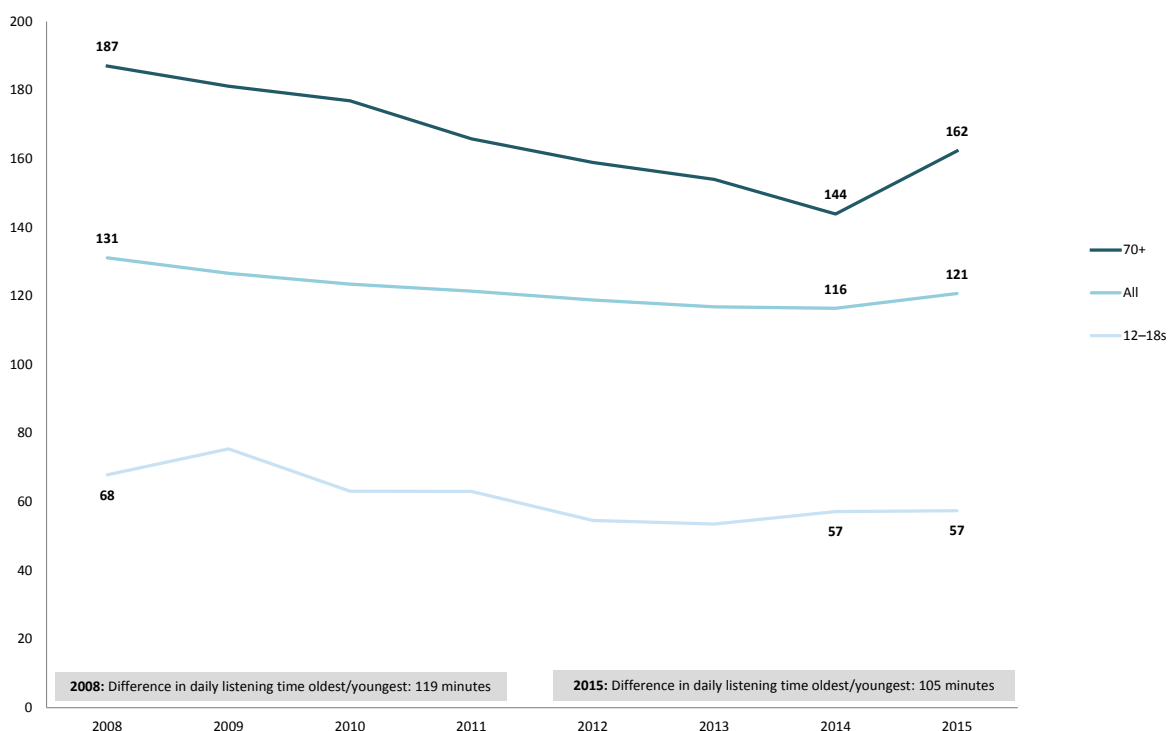
Universe: The Danish population aged 12+

As shown in Figure 10 below, the difference in daily listening between the youngest group and the oldest group is smaller in 2015 (difference 105 minutes) than in 2008 (difference 119 minutes). It also shows that the narrowing of the difference had more to do with the change in the listening habits of the 70+ than the 12–18s. Apart from a slightly larger decrease in listening time in the 12–18s from 2009–2010, the radio habits of this age group appear quite stable over time.

One reason why the radio and television habits of the 12–18s are developing so differently might be that, for decades, radio has been a portable medium which could be listened to eve-

rywhere, either on small radios, digital audio players or mobile phones, while, until relatively few years ago, television as a medium consisted of flow television on a television set – possibly a computer – connected by a TV cable or the like, binding the users to the home. Now, television and other audio-visual content from various streaming services can also be viewed on the go on mobile phones or tablets, switching the consumption of conventional television over to these platforms and devices – a consumption that is not yet fully reflected in the measurements of TV viewing in Denmark. As with television, there is use that is not yet registered via the industry-recognised measurement of radio listening – podcasts, for example, are not measured.

Figure 10: Average daily listening time in minutes distributed by age – 2008–2015, all, 12–18s and 70+

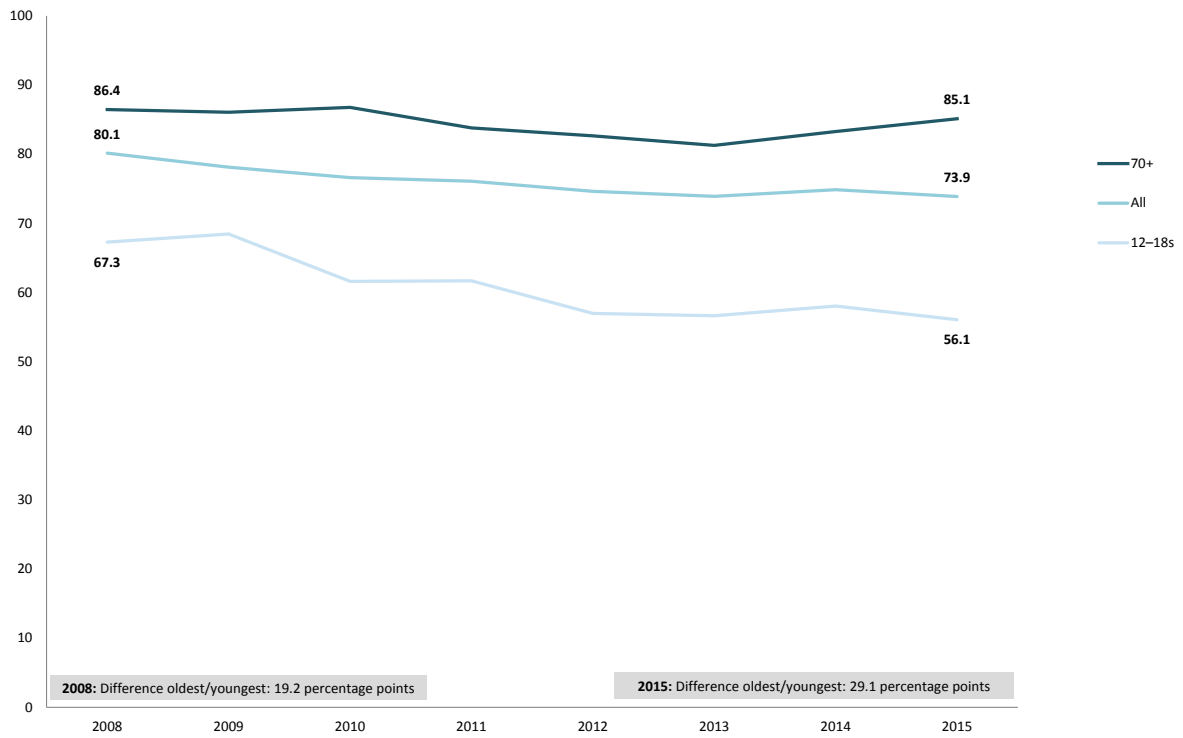


Source: TNS Gallup Radio-Meter
 Data processed by the Danish Agency for Culture and Palaces

Universe: The Danish population aged 12+

In the same way that we examined the reach of conventional TV viewing on a daily or weekly basis, in Figure 11 and Figure 12 below, we have calculated the reach of radio listening on a daily and weekly basis. Although the reach among 12–18s is in decline throughout the period from 2008–2015, the trend is not nearly as pronounced as for conventional TV. On a weekly basis, just over 86 % of the youngest age group have listened to the radio. In the 70+ age group, reach is high and stable. In the course of one week, just over 94 % of this age group listened to the radio.

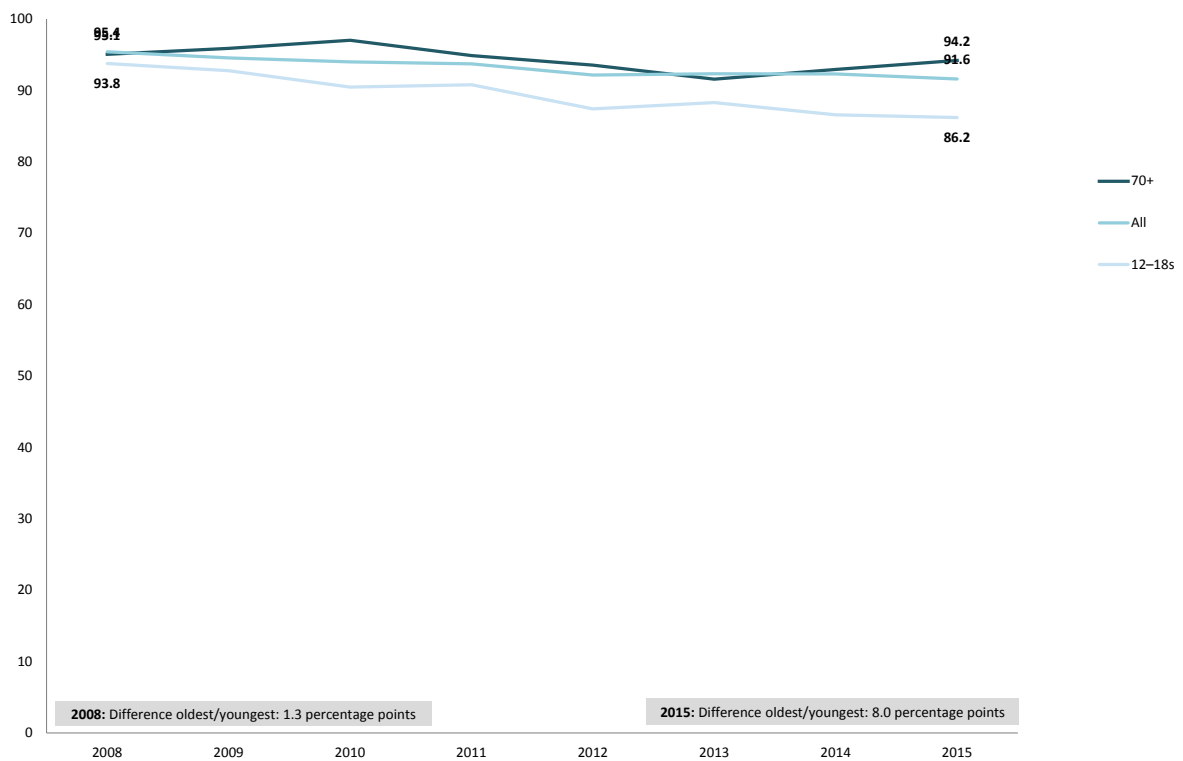
Figure 11: Radio listening: Average daily reach in % (AvRch%), 2008–2015. All, 12–18s and 70+



Source: TNS Gallup/Radio-Meter
Data processed by the Danish Agency for Culture and Palaces

Universe: The Danish population aged 12+

Figure 12: Radio listening: Average weekly reach in % (AvWkRch%), 2008–2015. All, 12–18s and 70+



Source: TNS Gallup/Radio-Meter
Data processed by the Danish Agency for Culture and Palaces

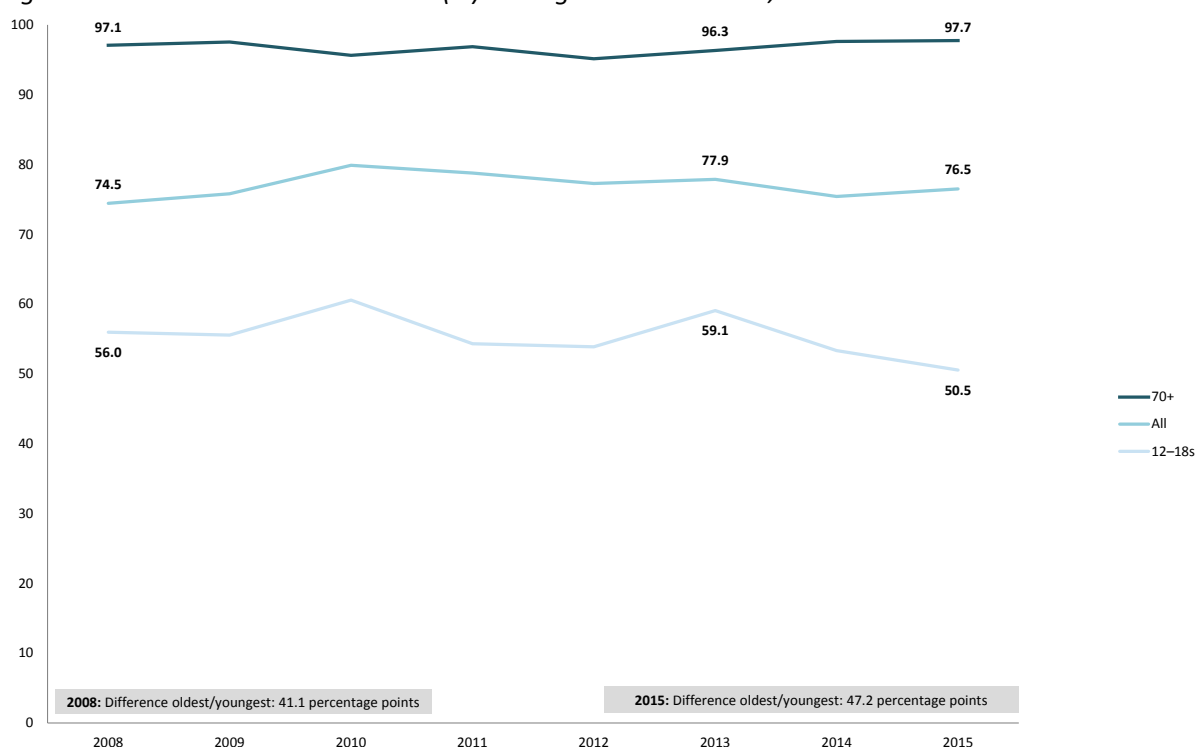
Universe: The Danish population aged 12+

According to the figures above, there has not been quite the same drop-off among 12–18s in terms of radio listening as there has for television. But where we saw that, in terms of conventional TV viewing, public service media constituted an *increasing* share of the 12–18s' consumption, the situation is the opposite when it comes to radio listening. From 2013 to 2015, public service radio has dropped from 59.1 % of listening in the age group to 50.5 %. The listening to public service radio by the oldest age group has remained largely unchanged throughout the period from 2008 to 2015. Between 96 % and 98 % of this age group's listening has been to public service radio. This also means that changes in listening to the public service channels have a great influence on the oldest age group's overall listening.

Young people are listening to commercial radio more than before, and, in 2015, this age group's listening is divided equally between public service radio and commercial radio.

In the oldest age group, listening to commercial radio is extremely limited, and throughout the period from 2008–2015, represented no more than 5 % of listening (2012: 4.9 %). In 2015, commercial radio represents only around 2 % of the listening of the oldest age group.

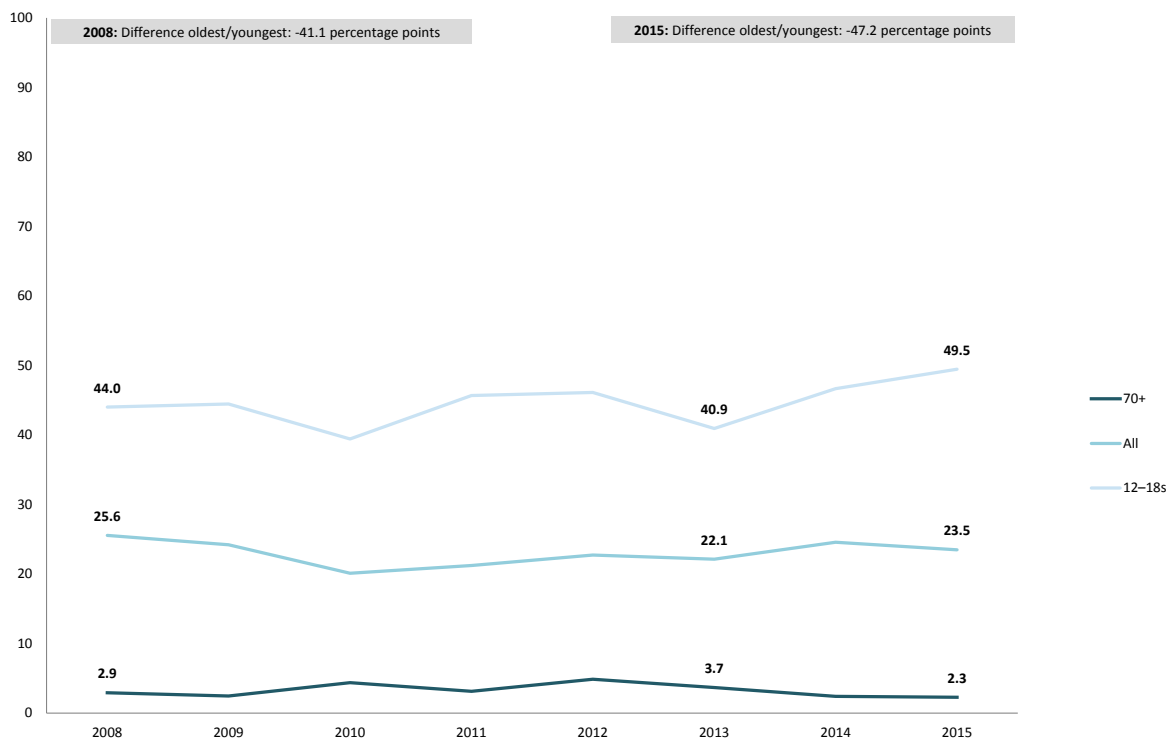
Figure 13: Public service radio: Share (%) and age 2008–2015. All, 12–18s and 70+



Source: TNS Gallup Radio-Meter
Data processed by the Danish Agency for Culture and Palaces

Universe: The Danish population aged 12+

Figure 14: Commercial radio: Share (%) and age 2008–2015. All, 12–18s and 70+



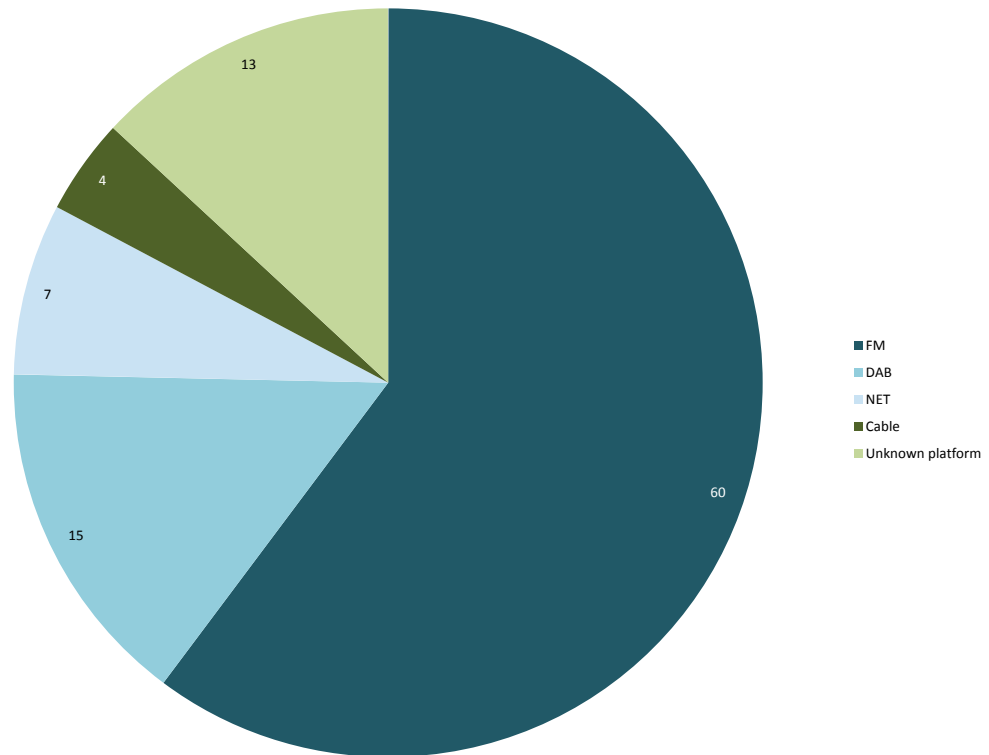
Source: TNS Gallup Radio-Meter
Data processed by the Danish Agency for Culture and Palaces

Universe: The Danish population aged 12+

In a supplementary agreement to the politically binding Media Agreement for 2015–2018, it was decided that radio listening trends on different platforms should be measured every autumn. As 50 % of radio listening is via digital platforms (cable, NET or DAB), a decision will be made on when the transition to digital radio will take place. However, this will not happen until at least two years after digital listening accounts for more than 50 % of the total listening. It has also been decided that there should be a gradual transition to the DAB standard DAB+, which is an enhanced version of DAB.

In Figure 15 below, the total radio listening is divided according to which platform the listening took place on in 2015. 60 % of the listening took place on FM, while digital listening overall (DAB, NET and Cable) accounted for 27 % of the total listening. 13 % of the total listening took place on an unknown platform in 2015.

Figure 15: Total radio listening distributed by platform (%) – 2015



Source: TNS Gallup Radio-Meter
Data processed by the Danish Agency for Culture and Palaces

Universe: The Danish population aged 12+

Table 3 below shows a breakdown of listening to DR, distributed by platforms. Listening to DR represents nearly 75 % of all radio listening in Denmark. As DR is also the only station that consistently codes its programmes for platform, it is pertinent – when following the trend over a number of years – to use DR listening as a more accurate indicator of the spread of digital listening.

Table 3: Total radio listening to DR's channels distributed by platform (%) – 2009–2015

	2009	2010	2011	2012	2013	2014	2015	Difference in percentage points	
								2014–2015	2009–2015
FM	90.8	89.9	89.0	79.7	75.5	72.4	67.1	-5.4	-23.7
DIGITAL LISTENING IN TOTAL:	9.3	10.1	11	20.3	24.5	27.5	32.9	+5.4	+23.6
• DAB	7.0	7.3	8.3	10.2	12.4	13.4	18.4	5.0	11.4
• NET	2.3	2.8	2.7	4.0	4.7	7.4	9.0	1.6	6.7
• Cable	0.0	0.0	0.0	6.1	7.4	6.7	5.5	-1.2	5.5

Source: TNS Gallup/Radio-Meter, data processed by the Danish Agency for Culture and Palaces

Universe: The Danish population aged 12+

As shown in Table 3 above, there is an ongoing decrease in FM listening and an increase in digital listening – DAB listening in particular has advanced: from 13.4 % in 2014 to 18.4 % in 2015.

Read more about radio listening in the report's chapter on radio.

4.3 Daily newspapers and local weekly papers

The trend for the printed dailies in the period from 2010–2015 was characterised by a continuous decline in its readership figures. This is a trend that can be attributed to technological advances with an increased and digitised media availability in combination with the changing media usage habits of people living in Denmark.

However, in the period from 2014–2015, for the first time in several years, the majority of daily newspapers have either put a stop to the decline in readership or are experiencing a more limited decline than in previous years. A number of newspapers actually enjoyed a pick-up in readership from 2014–2015.

In 2015, just over 2 million people (2,034,000) read a printed newspaper on a daily basis, corresponding to 41.5 % of the population aged 12+. Although the decline seen throughout the period for which there is data (2010–2015) continues, the decrease of 20,000 daily readers from 2014 (when just under 2.1 million people read a printed newspaper on a daily basis, corresponding to 42.5 % of the population) to 2015 for the daily newspapers as a group is significantly lower than the decrease from 2013 to 2014. Here, the decrease was 105,000 readers. Since 2010, when almost 59 % of the population read a newspaper on a daily basis, there has been a decrease of 729,000 daily readers.

As shown in Table 4 below, there are differences in the trend from 2014–2015 for national newspapers, which have seemingly maintained their readership figures, and provincial newspapers, which have experienced a decline of just over 4 %. Moreover, from 2013 to 2014, the provincial newspapers are harder hit when it comes to readership figures than the national newspapers.

Table 4: Average daily readership in 1,000s – daily paper groups – 2010–2015

	2010	2011	2012	2013	2014	2015	Change in %	
							2014–2015	2010–2015
All daily newspapers	2,763	2,606	2,436	2,159	2,054	2,034	-1.0 %	-26.4 %
All national newspapers	2,051	1,904	1,772	1,495	1,455	1,458	0.2 %	-28.9 %
All provincial newspapers	1,281	1,213	1,125	1,027	937	899	-4.1 %	-29.8 %

Source: Index Danmark/Gallup – Annual Data (annual data), data processed by the Danish Agency for Culture and Palaces

Universe: The Danish population aged 12+

In 2015, more than 2.7 million people (2,730,000), or almost 56 % of the population aged 12+, read a local weekly newspaper on a weekly basis. This is a decline from just over 2.8 million readers in 2014, or a decrease of almost 3 %. There is therefore a smaller decline from 2014–2015 than from 2013–2014, when the readership figures for the local weeklies fell by 6 %.

The island of Funen is the only area to have experienced a higher downturn from 2014 to 2015 than from 2013 to 2014, and has generally had a greater decrease in the weekly readership

figures of the local weeklies than other circulation areas, both in the past year and in the entire period from 2010–2015.

At first glance, the overall decline for the local weeklies from 2014 to 2015 and from 2013 to 2014 is greater than for the daily newspapers. Generally speaking, over the period from 2010–2015, the readership figures of the weekly newspapers have not been hit as hard as the daily newspapers', which is probably partly because they are distributed free of charge.

Table 5: Local weekly papers Average weekly readership (total) and in circulation areas, 2010–2015

	2010	2011	2012	2013	2014	2015	Change in %	
							2014–2015	2010–2015
Local weekly papers – in total	3,273	3,272	3,106	2,993	2,812	2,730	-2.9 %	-16.6 %
Copenhagen	678	680	630	622	577	561	-2.8 %	-17.3 %
East of the Great Belt, excluding Copenhagen	700	700	662	637	595	586	-1.5 %	-16.3 %
Funen	284	287	271	256	246	226.5	-8.0 %	-20.3 %
Jutland	1,610	1,604	1,543	1,477	1,393	1,357	-2.6 %	-15.7 %

Source: Lokal Index Danmark/Gallup – Annual Data (annual data), data extraction performed by TNS Gallup, data processed by the Danish Agency for Culture and Palaces. Universe: The Danish population aged 12+

The fall in readership of the local weeklies seems to tally with the prevalence of "No junk mail/No free papers" stickers.

Table 6: Share in % that have "No junk mail/No free papers" stickers on their door/letterbox/mailbox, 2010–2015

	2010	2011	2012	2013	2014	2015
Have No junk mail/No free papers stickers on the door/mailbox	9.6 %	10.1 %	12.0 %	12.9 %	14.2 %	14.9 %
Do not have No junk mail/No free papers stickers on the door/mailbox	87.1 %	86.4 %	84.5 %	84.4 %	83.1 %	81.1 %
Unanswered	3.3 %	3.5 %	3.5 %	2.6 %	2.8 %	3.9 %

Source: Index Danmark/Gallup – Annual Data (annual data), Universe: The Danish population aged 12+ Data processed by the Danish Agency for Culture and Palaces

If we compare the daily newspaper reading of 12–18s with daily newspaper reading in the 71+ age group, as we did for TV and radio above, it again becomes clear that media habits evolve very differently in the different age groups. Where there is a fall of 3.1 % in daily readership among 12–18s from 2014 to 2015, among the 71+ age group, there is a 0.3 % increase, and the status quo is largely maintained. Over the whole period from 2010–2015, the downturn among 12–18s is 39.4 %, while the in the oldest age group it is 8.3 %. However, the largest downturn is not among the 12–18s but the 19–34s, which from 2014 to 2015 fell by 7 %, and from 2010 to 2015 by 42.9 %.

Table 7: Average daily reach in % of all daily newspapers in total in 2010, 2014 and 2015 and age

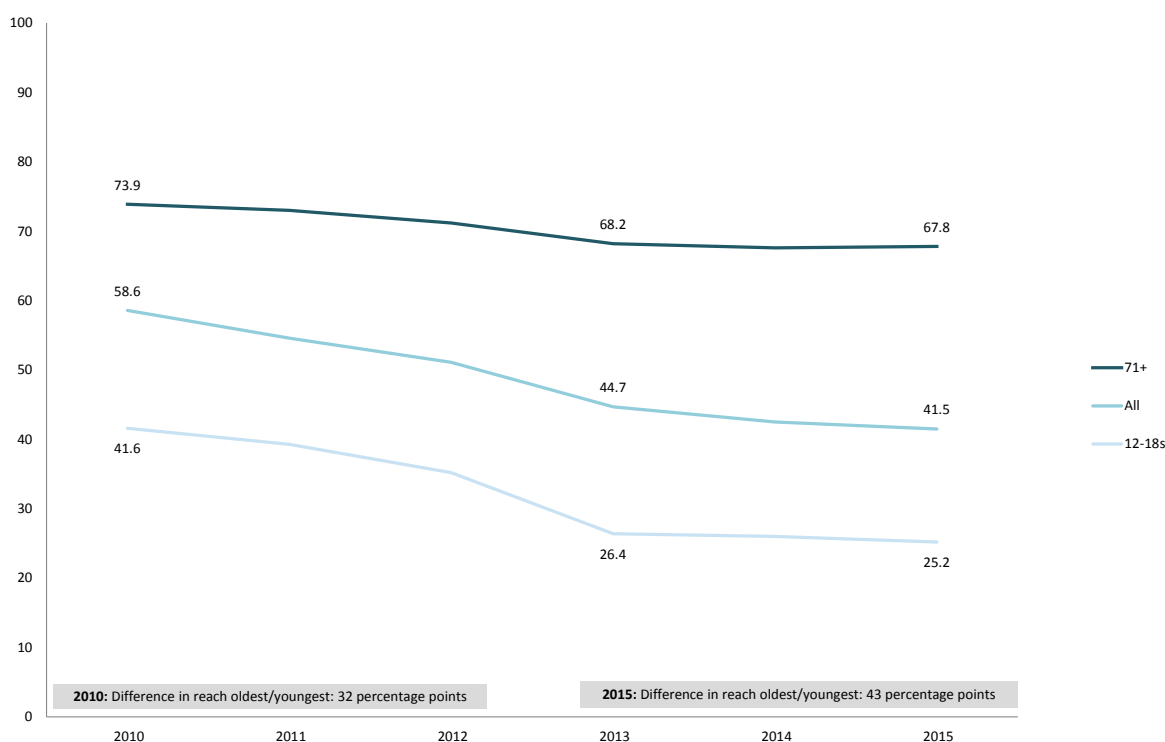
	Reach in %			Difference in percentage points		Difference in %	
	2010	2014	2015	2014–2015	2010–2015	2014–2015	2010–2015
All	58.6	42.5	41.5	-1.0	-17.1	-2.4 %	-29.2 %
12–18s	41.6	26.0	25.2	-0.8	-16.4	-3.1 %	-39.4 %
19–34s	46.2	28.4	26.4	-2.0	-19.8	-7.0 %	-42.9 %
35–54s	56.9	36.4	35.0	-1.4	-21.9	-3.8 %	-38.5 %
55–69s	73.3	58.9	58.1	-0.8	-15.2	-1.4 %	-20.7 %
Aged 71+	73.9	67.6	67.8	0.2	-6.1	0.3 %	-8.3 %

Source: TNS Gallup/Radio-Meter, data processed by the Danish Agency for Culture and Palaces

Universe: The Danish population aged 12+

As shown in Figure 16 below, the difference in reach between the oldest and the youngest in 2010 was 32 percentage points, while in 2015, it has increased to 43 percentage points.

Figure 16: Average daily reach in % of all daily newspapers combined 2000–2015 and age, all, 12–18s and 71+



Source: Index Danmark/Gallup – Annual data 2010–2015
Data processed by the Danish Agency for Culture and Palaces

Universe: The Danish population aged 12+

Figure 17 and Figure 18 below show the trends for two of nine daily paper groups that are part of the combined daily newspaper group shown in Figure 16 above – tabloids and free papers/commuter papers. In recent years, these two newspaper groups have in recent years managed either to halt the fall in reach or to have achieved a marked increase in the youngest age group.

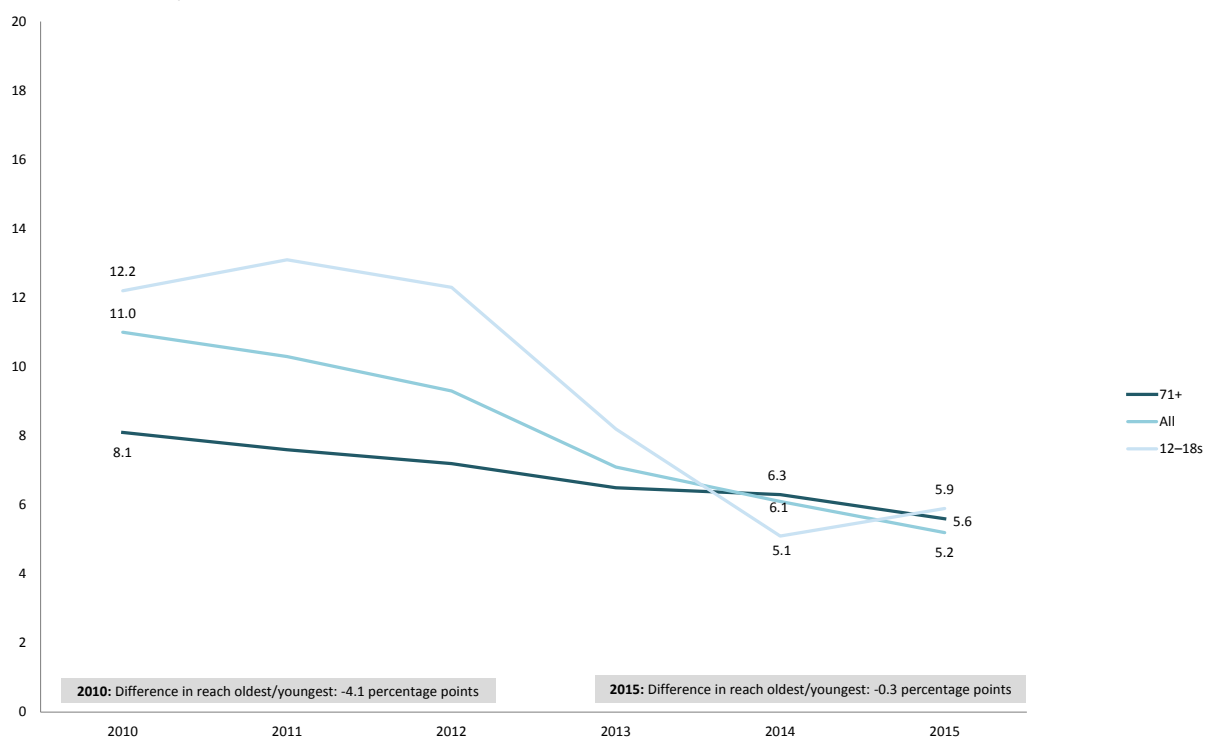
Note that the scale on the y axis in Figure 17 and Figure 18 only goes to 20 %, while in the above figures, it goes to 100 %. This means that the changes appear larger here than they do in

Figure 16. However, this provides a better opportunity to see the trends in the two age groups we are focusing on.

Tabloid newspapers are one of the printed media groups which have had a higher reach among the 12–18s throughout most of the period from 2010 to 2015 than among the 71+ age group and the general population. Only in 2014 was the reach higher in the 71+ age group. Throughout the period, the reach also remained relatively stable, although it fell gradually in the oldest age group from 8.1 % in 2010 to 5.6 % in 2015. In the 12–18 age group, there were significantly greater fluctuations from 2010 to 2015. So the reach in the age group in 2010 was 12.2 % (4.1 percentage points *higher* than in the oldest age group), and in 2014, it was down to 5.1 % (1.2 percentage points lower than the oldest age group). In 2015, the reach among the 12–18s increased to 5.9 % – just 0.3 percentage points above the reach among the 71+ age group.

There has also been some fluctuation in respect of commuter newspapers/free newspapers – this time in both age groups. The distance between the two age groups is almost the same in 2010 and 2015, just the other way round: In 2010, the reach among 12–18s was 1.8 percentage points *higher* than among the 71+ age group, while in 2015, it is 2 percentage points *lower*. Note that in 2010, there were three free newspaper titles (MetroXpress, Urban, 24timer). In 2011 and 2012, there were two free newspaper titles (MetroXpress, 24timer) and since 2013, there has been only one free newspaper (MetroXpress).

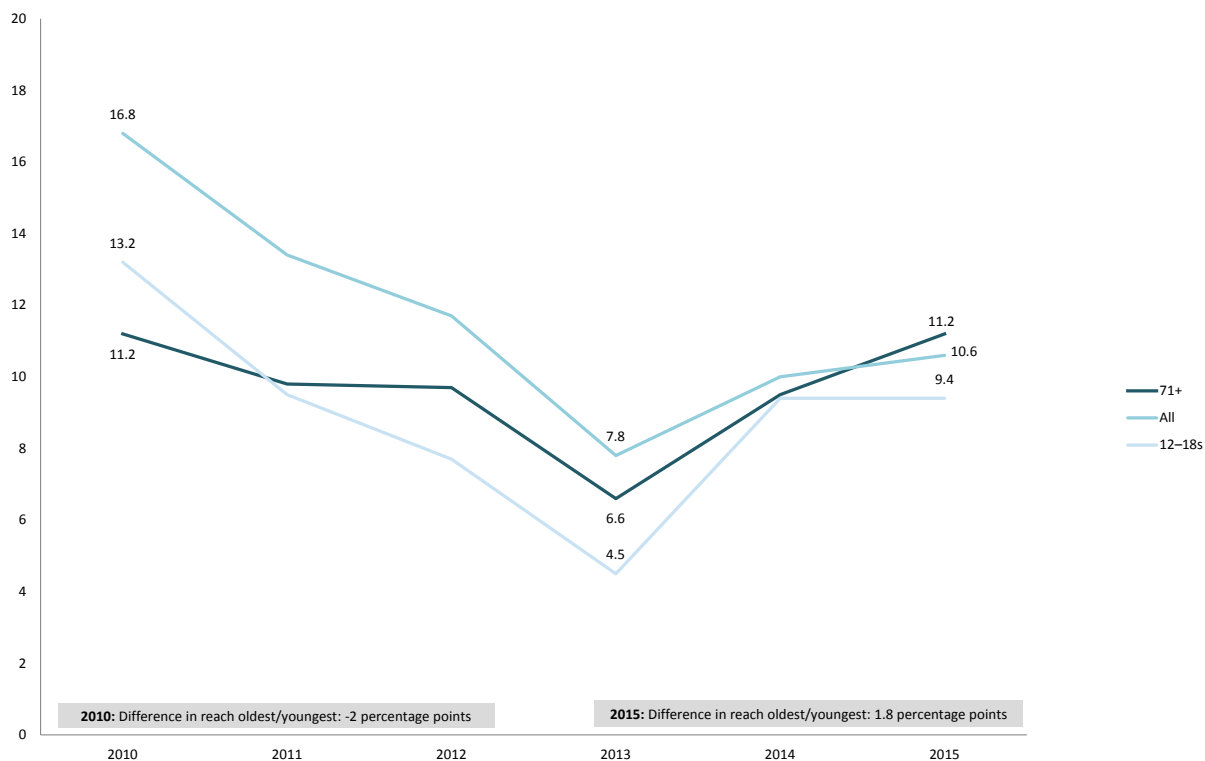
Figure 17: Reach in % of national newspapers – TABLOID NEWSPAPERS – distributed by age – 2010–2015 All, 12–18s and 71+



Source: Index Danmark/Gallup – Annual data 2010–2015
Data processed by the Danish Agency for Culture and Palaces

Universe: The Danish population aged 12+

Figure 18: Reach in % of national newspapers – FREE PAPERS/COMMUTER PAPERS – distributed by age – 2010–2015 All, 12–18s and 71+



Source: Index Danmark/Gallup – Annual data 2010–2015
 Data processed by the Danish Agency for Culture and Palaces

Universe: The Danish population aged 12+

The printed newspaper is probably the conventional media type most affected by technological advances. However, the written, publicistic (news) medium is certainly not on its way out. However, it is changing, having long since moved on to other platforms – including purely web-based news media that do not originate from a printed medium or radio or television.

Moreover, newspaper publishers have added new products and content types to their product portfolios and developed new business models for the web-based part of the business. Magazine publishers have a wide reach on the internet, which is shown in the section on web traffic below. Media companies have been through a process of development concurrently with technological advances and the subsequent media development. To some extent, the providers of media content on the market remain the same, but the content is now available on multiple platforms. It is therefore pertinent to evaluate the use of the magazine publishers' total range of products to assess their reach in the population. The media's reach in the population is described in Section 4.4 on web traffic below.

Read more about the consumption of print media in the Newspaper/Print chapter on the website of the report.

4.4 Web traffic – use of Danish news media online

The analysis of web traffic on the online Danish news media is based on a multi-platform measurement, which, in addition to the use of desktop computers, also includes the use of

mobile phones and tablets. The figures for web traffic on the Danish news media are based on figures for the whole of 2015, and are calculated as figures for an average month or an average day in 2015.

2015 is the first year that multi-platform measurements and the total usage across platforms have become available. This means that it is not possible to compare with previous years or describe development trends for web traffic over time. The measurements now include the use of mobile phones and tablets, and thus a number of use situations not previously included in the measurement.

Compared to the biggest Danish media sites, the biggest international sites, Facebook and Google, take a greater share of users' time measured on the desktop platform alone than any of the Danish media sites across the three platforms: desktop, mobile and tablets.

In the analysis, the Danish online news media are divided into a number of overarching media groups. Table 8 below shows a number of key figures for the Danish internet users' use of the different media groups. The different media groups are composed of a number of selected titles. The number of titles (sites) for the individual media groups are not the same, which has implications for the aggregate figures in the table below. You can read more about the different media groups in the chapter Web traffic.

Table 8: Key figures for the overarching media groups: Reach per month, users per month, page views per month, visits per month, time consumption per user per month (hh:mm:ss), average daily reach. 2015

Media groups	Monthly reach	Users	Page views	Visits	Time consumption per user	Daily reach
Independent internet media	32 %	1,573,363	26,156,415	15,578,701	00:15:10	7 %
Free papers	18 %	907,338	24,598,406	6,155,737	00:10:16	3 %
National dailies – All	67 %	3,319,257	490,165,613	155,986,725	03:07:09	30 %
National public service^{*)}	64 %	3,179,019	216,240,046	71,570,924	01:38:11	21 %
Local (weekly) papers	16 %	791,206	6,449,678	2,908,027	00:05:37	2 %
Regional public service	18 %	867,941	8,773,238	4,442,395	00:07:12	2 %
Regional dailies	31 %	1,518,897	53,553,230	14,166,160	00:24:22	6 %

*Source: Gemius – gemiusAudience 2015, *)National public service includes dr.dk and tv2.dk*

In 2015, almost 1.5 million Danes on average accessed news on a daily basis via one of the national newspapers' websites, corresponding to 30 % of Danish internet users aged 7+. More than 1 million users (21 %) visited one of the national public service media websites on a daily basis, while the independent internet media (7 %) had around 300,000 daily users. On average, 6 % of internet users visited the websites of regional newspapers on a daily basis, which is three times more than for the regional public service media, which were visited by 2 % of internet users on a daily basis.

In 2015, the national newspapers reached, on average, 67 % of Danish internet users per month, while the national public service media reached 64 %. For each of the two dominant media groups, this corresponds to an average of more than 3 million users per month in 2015. While the national newspapers and the national public service media are used by a more or less equal number of Danish internet users over the course of an average *month*, over the course of an average *day*, the national newspapers have almost one and a half times more users than the national public service media in 2015. During an average month, the regional dailies reach 31 %, while the regional public service media reach 18 %.

When it comes to the number of page views, visits and time consumption, the media group containing the national newspapers is ahead of the other media groups. The national newspapers have on average more than 490 million page views per month, which is more than twice as many as the national public service media. The high number of page views for the national newspapers is partly due to the tabloids' extensive contribution to the number of page views.

There are a number of structural differences in how and to what extent the various media groups are used. Particularly age and gender are factors that determine which media groups Danish Internet users access as well as web traffic patterns.

The media groups have a different reach in the different age groups. The national newspapers and the national public service media in particular have a high reach in all age groups, i.e. they have broad appeal in the population.

The free newspapers have a significantly higher monthly reach among 7–18s (31 %) than among users aged 71+ (5 %). The same applies to the national public service media, which have a reach among young people of 74 % and 53 % among the elderly. The same pattern applies to the independent internet media.

On the other hand, the local papers, regional public service media and regional newspapers have a higher average monthly reach among the elderly than among younger internet users. Most significant is the relative difference of the local papers, which have a 15 % reach among the elderly aged 71+ and just 7 % among 7–18s. For regional newspapers, the reach is 28 % among the elderly, while it is 19 % among the younger age group.

Table 9: Reach of the overarching media groups – distributed by gender and age. 2015

Media groups	All	Aged 7-18	Aged 19-34	Aged 35-54	Aged 55-70	Aged 71+
Independent internet media	32 %	34 %	41 %	31 %	27 %	19 %
Free papers	18 %	31 %	31 %	13 %	9 %	5 %
National dailies – All	67 %	65 %	71 %	67 %	66 %	63 %
National public service	64 %	74 %	70 %	62 %	59 %	53 %
Local (weekly) papers	16 %	7 %	14 %	19 %	19 %	15 %
Regional public service	18 %	11 %	19 %	20 %	19 %	13 %
Regional dailies	31 %	19 %	31 %	34 %	35 %	28 %

Source: Gemius – gemiusAudience 2015

For the national newspapers, the monthly reach is largely the same in the youngest age group (65 %) and in the oldest age group (63 %). However, the users aged 71+ have an average of 141 page views per month, while the 7–18s have only around a third as many page views (45). With an average monthly time consumption of 2 hours and 53 minutes on the national newspapers, the internet users aged 71+ spend 2 hours more per month than the 7–18s (51 minutes).

When it comes to the regional dailies, the oldest age group has on average 44 page views per month, while the youngest age group has 9. Where the elderly spend on average 35 minutes a month on regional newspapers, the 7–18s spend less than 4 minutes.

The national public service media and free newspapers stand out insofar as the average monthly time consumption for the young and the elderly is almost identical. The 7–18s spend on average 1 hour and 19 minutes per month on public service media, while the elderly spend an average of 1 hour 23 minutes.

Where the various age groups' use of the different news media online is concerned, it is also important to remember that a number of users – perhaps young people in particular – access news via social media, either in addition to or instead of the conventional news media web-sites. The use of news media via social media is only partially included in measurements of web traffic.

4.5 Internet use and devices – the differences have diminished in some areas

In Denmark, 90 % of the population aged 16–89 had access to the internet at home in 2015. For younger members of the population, the share was even higher, and only a very small share of the population did not have internet access at all. There is a minor downturn of 2–3 percentage points among some of the older age groups compared to 2014, but the level is maintained in the oldest age group aged 75–89.

Table 10: Share of the population aged 16–89 in % with internet access at home in 2014 and 2015

	2014	2015
In total	91 %	90 %
Aged 16-24	97 %	97 %
Aged 25-34	96 %	97 %
Aged 35-44	97 %	97 %
Aged 45-54	94 %	95 %
Aged 55-64	94 %	92 %
Aged 65-74	86 %	83 %
Aged 75-89	56 %	56 %

Source: Statistics Denmark – IT use in the population, 2014 and 2015.

The share of the population that uses the internet on a daily basis has steadily increased in recent years, while the share of Danes who never use the internet has fallen – though the share is unchanged in 2015 compared to 2014.

As shown in Table 11 below, as with other media use, age also determines how often Danes use the internet. 95 % of 16–24s use the internet daily, while the figure is just under 37 % for 75–89s. Note, however, that the share of 75–89s that used the internet on a daily basis in 2014 was 31 %. This represents an increase of almost 6 percentage points from 2014 to 2015.

Among 55–64s, there has also been a certain increase from 2014 to 2015 in the share that uses the internet daily or almost daily (from 75 % to 79.7 %, corresponding to just under 5 percentage points). The only age group that seems to have had a slight downturn is the 65–74s. This is still the oldest age group that uses the internet the least, and 40 % of 75–89s in 2015 have never used it.

Table 11: Share of the Danish population aged 16–89 (%) that has never used the internet or that has used the internet every day or almost every day from 2014 to 2015

		Uses the internet every day or almost every day	Has never used the internet
ALL	2014	81.0 %	6.0 %
	2015	83.0 %	5.9 %
Aged 16-24	2014	95.0 %	0.0 %
	2015	95.2 %	0.0 %
Aged 25-34	2014	95.0 %	0.0 %
	2015	97.8 %	0.4 %
Aged 35-44	2014	91.0 %	0.2 %
	2015	94.2 %	0.2 %
Aged 45-54	2014	87.0 %	1.0 %
	2015	90.4 %	1.5 %
Aged 55-64	2014	75.0 %	3.0 %
	2015	79.7 %	2.8 %
Aged 65-74	2014	65.0 %	12.0 %
	2015	64.1 %	12.9 %
Aged 75-89	2014	31.0 %	41.0 %
	2015	36.8 %	40.0 %

Source: Statistics Denmark – IT use in the population, 2014 and 2015

The most popular device used to access the internet is, as shown by Table 12 below, still the laptop computer, which is used by 79 % of the population – a slight downturn from 2014 (81 %). From 2014 to 2015, there was only a slight increase from 74 % to 76 % in the share of the population that had used a smart phone to access the internet. This is in contrast to the growth from 2013 to 2014. In 2014, 74 % of the population used a smartphone to gain access to the internet, compared to just 51 % in 2013. So there seems to have been a slowdown in the rate of increase for the use of smartphones for internet access.

It is also still popular to use a tablet to go online, but as with the smartphone, there seems to have been a slowdown in the rate of increase for the use of tablets for internet access. More than half (59 %) of the population used a tablet for internet access in 2015. In 2014, the figure was 55 %, while it was only about a third of the population in 2013.

Age also plays a crucial role in what device Danes use for internet access. Approximately 90 % of the three youngest age groups used a smartphone for internet access in 2015 – virtually the same share as in 2014. Only around 30 % of 75–89s used a smartphone to access the internet in 2015. However, just as this age group accounted for the biggest increase in the share that goes online every day, the biggest increase in the use of smartphones for internet use was also among the 75–89s: 22 % used smartphones to access the internet in 2014 and 28 % in 2015.

There have also been healthy increases in the use of smartphones for internet access among 55–64s and 65–74s from 2014 to 2015, see Table 12 below. So even though the older mem-

bers of the population still have a significantly lower use of smartphones to access the internet than the youngest, it is in this section of the population that we see the greatest growth rates.

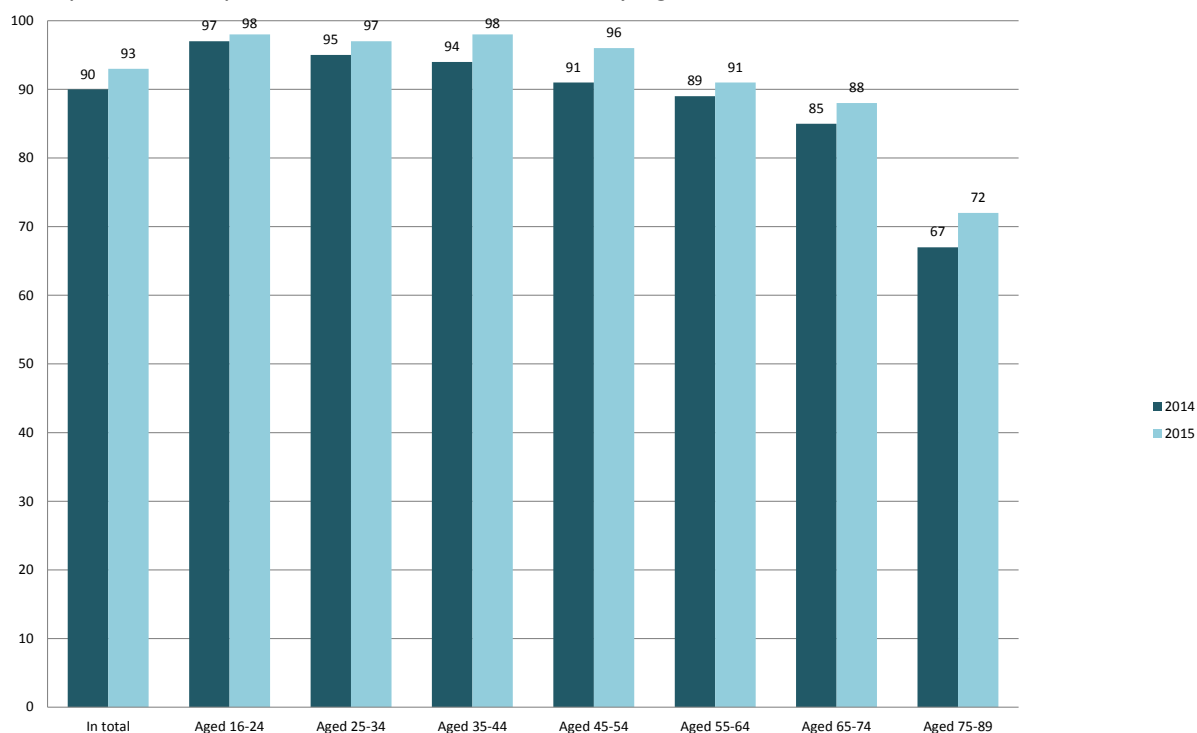
Table 12: Share of the Danish population aged 16–89 (%) that has used different types of IT devices to access the internet, 2014 and 2015

		Laptop	Smartphone	Tablet	Desktop computer
ALL	2014	81 %	74 %	55 %	44 %
	2015	79 %	76 %	59 %	41 %
Aged 16-24	2014	93 %	91 %	55 %	39 %
	2015	92 %	91 %	60 %	37 %
Aged 25-34	2014	90 %	89 %	59 %	34 %
	2015	87 %	88 %	65 %	30 %
Aged 35-44	2014	90 %	89 %	74 %	42 %
	2015	88 %	88 %	82 %	40 %
Aged 45-54	2014	88 %	84 %	64 %	53 %
	2015	88 %	85 %	69 %	47 %
Aged 55-64	2014	80 %	66 %	50 %	51 %
	2015	78 %	71 %	56 %	49 %
Aged 65-74	2014	66 %	49 %	40 %	50 %
	2015	62 %	54 %	38 %	45 %
Aged 75-89	2014	36 %	22 %	19 %	32 %
	2015	36 %	28 %	19 %	30 %

Source: Statistics Denmark – IT use in the population, 2014 and 2015

As shown in Figure 19 below, the mobile phone is generally very widely used in all age groups. Only in the 65–74s and upwards have less than 90 % (88 %) used a mobile phone or smartphone in the past three months, and among the 75–89s, the figure is 72 % in 2015 – up from 67 % in 2014.

Figure 19: Share of the Danish population (16–89s) (%) that has used a mobile phone or a smartphone in the past three months – distributed by age, 2014–2015



Source: Statistics Denmark – IT use in the population 2015
Data processed by the Danish Agency for Culture and Palaces

Universe: The Danish population aged 16–89
N = 5,385

With the high prevalence and use of mobile phones, there is also an increased use of various mobile features. Throughout the period from 2010–2015, there has been a major increase in the use of various mobile features and services – payment services and online banking in particular have increased dramatically over the period. Text messaging has remained at such a high level during the entire period that there are only slight fluctuations from year to year.

Table 13: Share of the Danish population (16–89s) (%) that has used different mobile features and services. 2010–2015

	2010	2011	2012	2013	2014	2015	Change 2010–2015	
							Percentage points	%
Applications	14 %	22 %	36 %	46 %	52 %	59 %	45 %	322 %
Payment (e.g. via text message)	8 %	13 %	18 %	24 %	35 %	50 %	42 %	536 %
GPS	13 %	23 %	38 %	44 %	50 %	58 %	45 %	332 %
Internet via the mobile phone	21 %	31 %	51 %	55 %	63 %	70 %	48 %	229 %
MMS	39 %	43 %	46 %	52 %	55 %	63 %	24 %	62 %
Online banking	N/A	6 %	17 %	24 %	33 %	43 %	37 % ^{*)}	577 % ^{*)}
Text messages	81 %	83 %	84 %	84 %	83 %	85 %	5 %	6 %

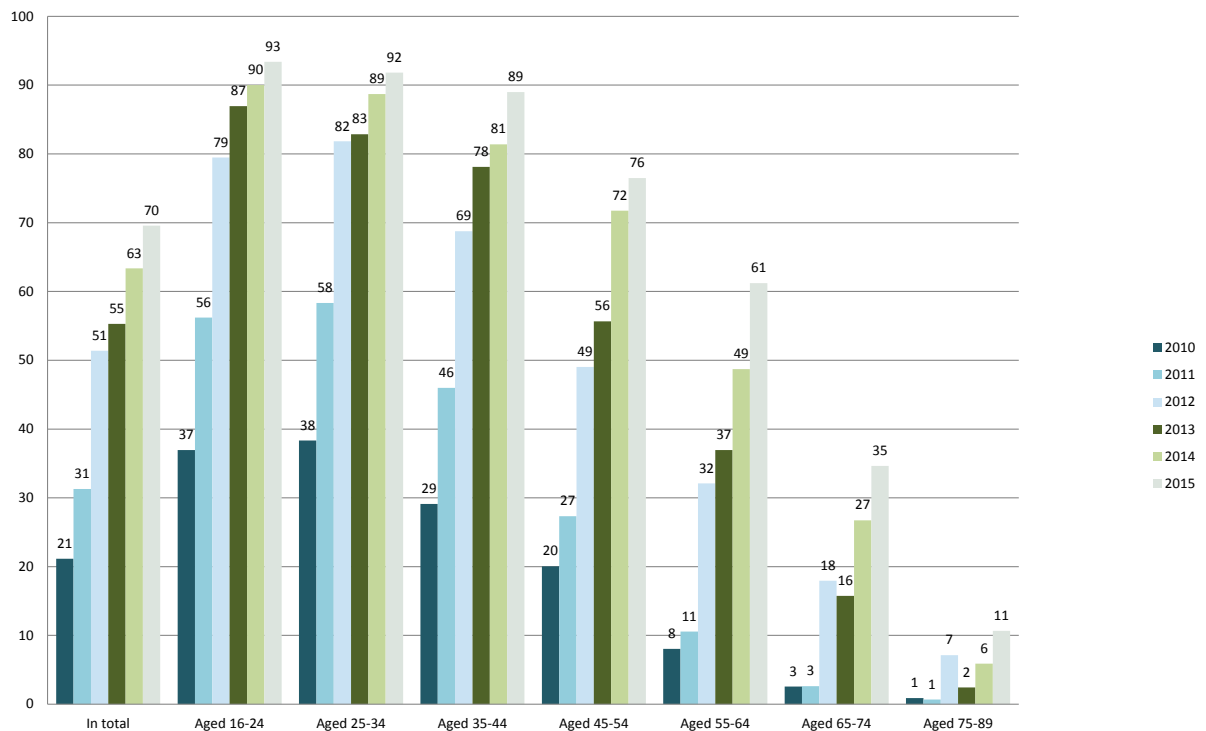
^{*)} Change calculated from 2011, as there is no data for online banking in 2010

Source: Statistics Denmark – IT use in the population 2010–2015

As shown in Table 13 above, almost all mobile features have enjoyed quite a significant increase in consumption during the period from 2010–2015, including internet use via the mobile phone. As media consumption has become increasingly mobile, mobile features and growth in the use of these are essential to media development.

However, trends in this area have been very different across the age groups, as can be seen in Figure 20 below. Among 16–24s, the share that has used the internet via a mobile phone increased from 37 % in 2010 to 93 % in 2015, while the corresponding figures for 75–89s show an increase from 1 % in 2010 to 11 % in 2015. However, there is a relatively healthy increase from 2014 to 2015 for this age group – in 2014, 6 % used the internet via a mobile phone. The age group with largest increase in percentage points from 2014 to 2015 is the 55–64s, which increased from 49 % to 61 %.

Figure 20: Share of the Danish population (16–89s) (%) that has used the internet via a mobile phone in the past three months – distributed by age. 2010–2015



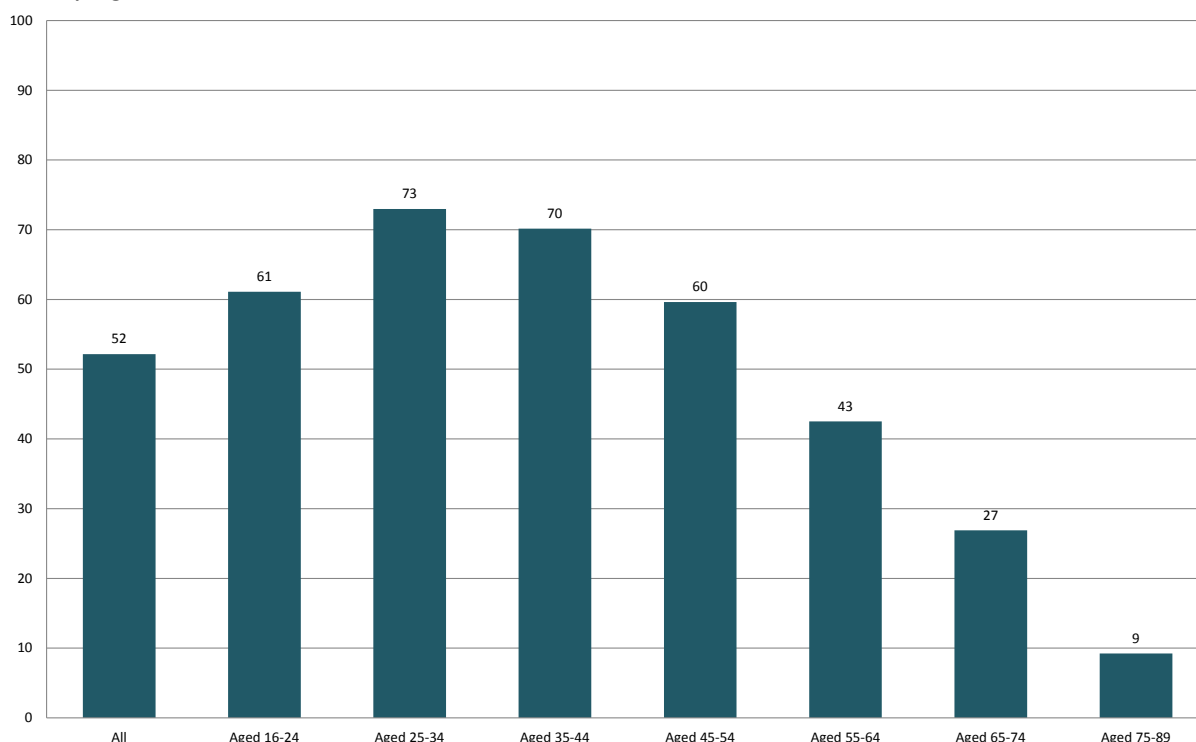
Source: Statistics Denmark – IT use in the population 2015
Data processed by the Danish Agency for Culture and Palaces

Universe: The Danish population aged 16-89

The option to read or download news, newspapers or newsletters to a mobile phone or tablet, etc., is used by more than half the population in 2015, but, according to Figure 21 below, there is a significant difference in the various age groups' use of this option.

The age group with the highest share that has read news on a mobile device is the 25–34s, where 73 % have read news on a mobile, tablet, iPad or iPod. In comparison, only 9 % of the oldest age group (75–89s) has done the same. Among the youngest – 16–24s – the figure is 61 %.

Figure 21: Share of the Danish population (16–89s) (%) that has used the internet via a mobile, tablet or iPad in the past three months to read or download the news on the internet – distributed by age. 2015



Source: Statistics Denmark – IT use in the population 2015
Data processed by the Danish Agency for Culture and Palaces

Universe: The Danish population aged 16–89
N = 5,385

From the Danish Agency for Culture and Palaces' special report on "Media usage on the internet – streaming, content and access" from December 2015, we know how often Danes use/stream/read different types of media on the internet (i.e. in relation to the internet in general and not only in relation to the internet via a mobile phone).

As shown in Figure 22 below, there is quite a considerable difference in the youngest and oldest age groups' use of online media. The difference is lowest when it comes to reading newspapers/magazines online, where there are slightly more daily users among the 12–18s than among those aged 71+. However, on a weekly basis, there is no difference between the two age groups. Both age groups show a less frequent use of online newspapers/magazines than the population (12+) in general.

In relation to the types of content accessed by the different age groups via the internet as television/videos, there are several content types where there are considerable differences between the oldest and youngest users, and there are content categories where the differences are less pronounced – as shown in Figure 23 below.

For the more entertainment-oriented categories such as "Shorter video clips (on YouTube, Vimeo, etc.)", "Entertainment" and "Feature films/series", the 12–18s are heavy users in relation to the general population, particularly compared with the oldest age group (71+). For ex-

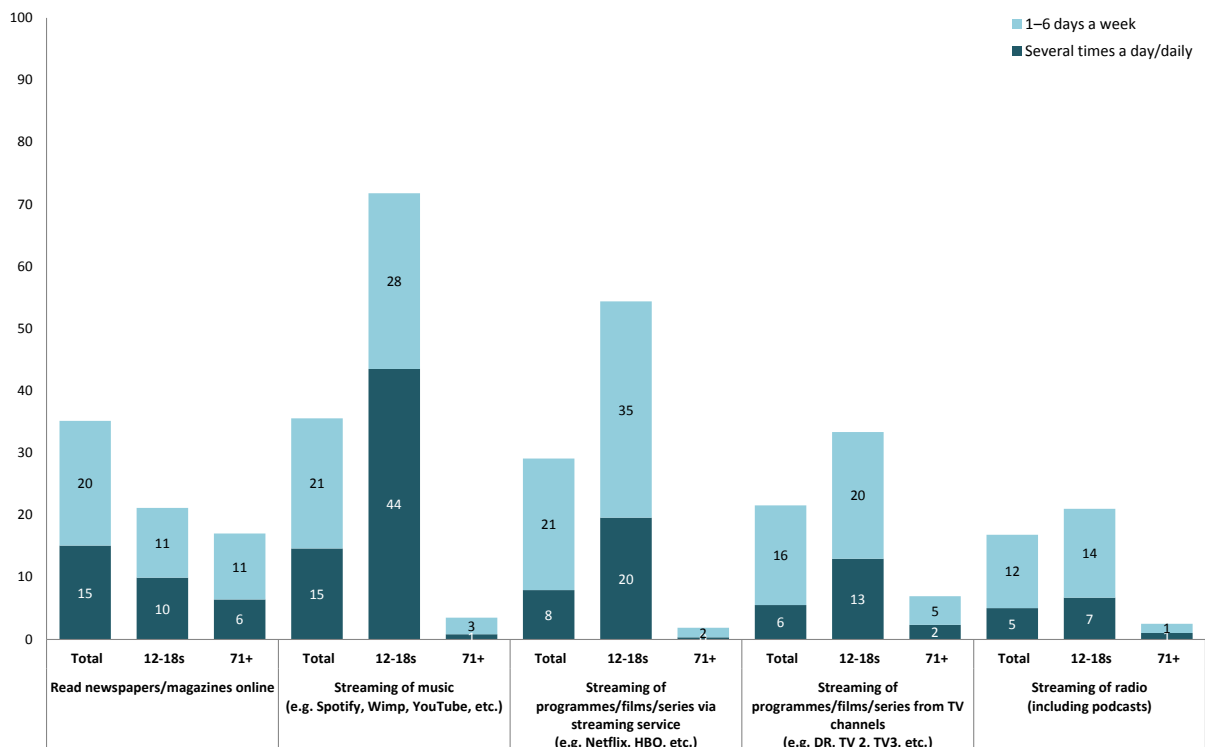
ample, 28 % of 12–18s stream short video clips several times a day/daily and 30 % do so 1–6 days a week. For the general population, the corresponding figures are 9 % and 21 %, and for the oldest age group, 0.5 % and 3 %.

In categories such as "News", "Current affairs/debate" and "Cultural programmes", the differences between the age groups are not as pronounced, but the use of these categories is generally also relatively low in comparison to the entertainment categories. Compared to the population in general and in relation to 12–18s, the 71+ are the most frequent streamers of "News" as TV/video. 12 % of this age group stream news several times a day/daily, while the figure is 10 % for the general population and 5 % for 12–18s.

The young age group is, however, the age group with the largest share (24 %) – both in relation to the general population (17 %) and to the oldest age group (7 %) – that streams news 1–6 days a week. So young people are also interested in news, just not quite as frequently as the other groups.

"Current affairs/debate" and "Cultural programmes" are relatively low in frequency of use, and there is virtually no difference between the youngest, the oldest and the general population in terms of daily use. However, when it comes to weekly use, the 12–18s are just slightly ahead of the other two groups.

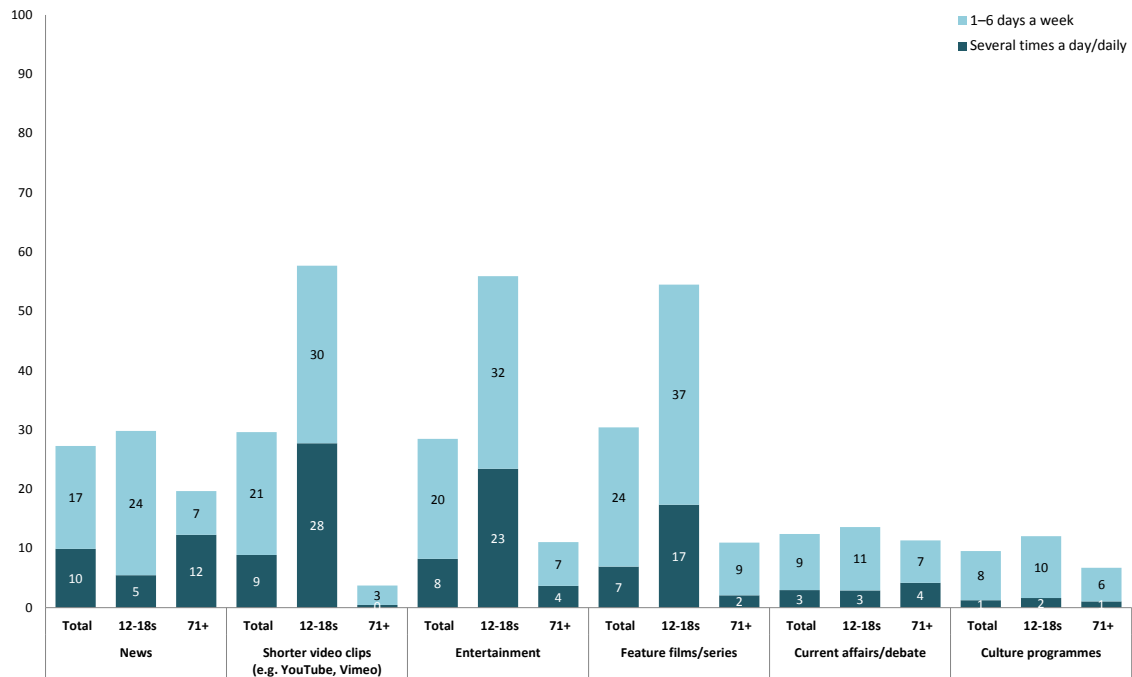
Figure 22: How often do you stream music/radio/TV/films/series or read newspapers/magazines online? Response distribution in %. All, 12–18s and 71+ – Stream several times a day/daily or 1–6 days a week



Source: Index Danmark/Gallup 1H2015 - The Danish Agency for Culture and Palaces' own questions
Data processed by the Danish Agency for Culture and Palaces

Universe: The Danish population aged 12+ with internet access (97.4% of the entire population aged 12+)
Random sample: 11,611 respondents

Figure 23: How often do you stream content such as TV/video via the internet (via a desktop computer, laptop, tablet or mobile phone)? Response distribution in %. All, 12–18s and 71+ – Stream several times a day/daily or 1–6 days a week



Source: Index Danmark/Gallup 1H2015 - The Danish Agency for Culture's own questions
Data processed by the Danish Agency for Culture

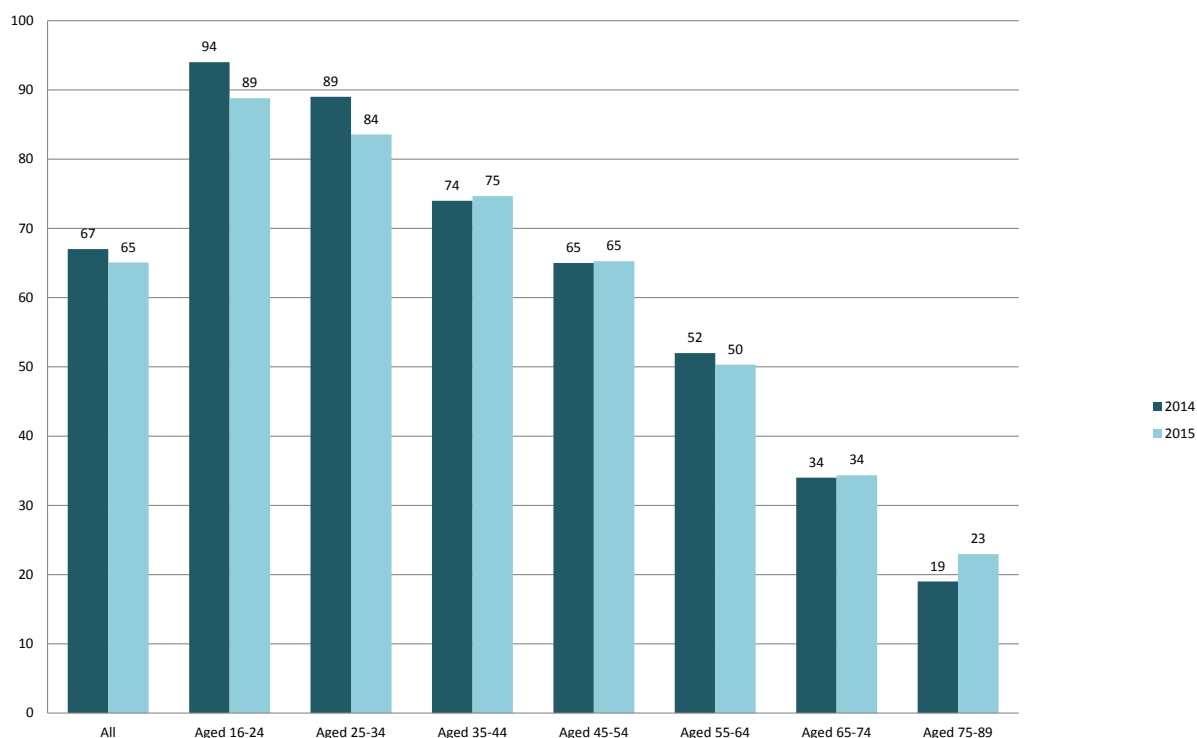
Universe: The Danish population aged 12+ with internet access (97.4% of the entire population aged 12+)
Random sample: 11,611 respondents

The social networking services are popular, and in 2015, 65 % of internet users use social media. In 2014, the figure was 67 %. However, there is a major difference in the age groups' use of social media, and there is evident correlation between age and the use of social media – the younger the age group, the greater the share that uses social media.

In 2015, 89 % of 16–24-year-old internet users use social media, while the figure is 23 % for 75–89-year-old internet users. For the 16–24s, there is a decrease compared to 2014, when 94 % of the age group used social media, while for the 75–89s, there is an increase from 19 % in 2014. This increase is the largest of all the age groups that have shown an increase from 2014 to 2015. In the 25–34 category, there is a decline from 2014 (89 %) to 2015 (84 %).

In 2014, there was a difference of 75 percentage points between the share of 16–24s and 75–89s that used social media. In 2015, this difference has reduced by 10 percentage points to just under 66 percentage points. Although there is still a big difference between the youngest and the oldest internet users' use of social media in 2015, the difference has narrowed.

Figure 24: Share of internet users (16–89s) (%) using social media – distributed by age. 2014–2015

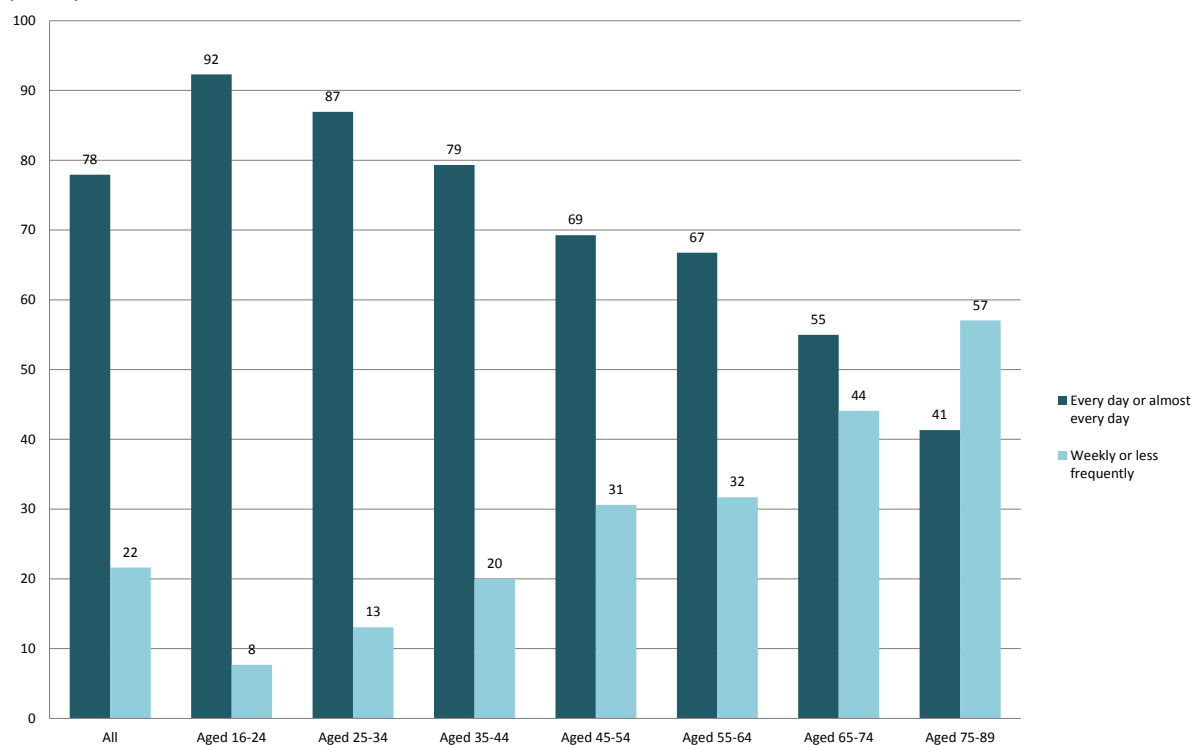


Source: Statistics Denmark – IT use in the population 2015
Data processed by the Danish Agency for Culture and Palaces

Universe: Danish internet users aged 16–89
N = 4,640

The difference between the age groups' use of social media is also seen in relation to the frequency with which these media are used in the different age groups. It is clear from Figure 25 below that the youngest users of social media use social media far more frequently than the oldest users of social media: 92 % of 16–24-year-old social media users use them every day or almost every day, while just 41 % of 75–89-year-old social media users use them every day or almost every day. On the other hand, 57 % of the oldest age group uses social media on a weekly basis or less often.

Figure 25: Share of social network users (16–89s) (%) using social media – distributed by frequency. 2015



Source: Statistics Denmark – IT use in the population 2015
Data processed by the Danish Agency for Culture and Palaces

Universe: Danish social network users aged 16–89
N = 2,670

Despite the prevalence of social media, the Danish Agency for Culture and Palaces' special report on "Social media – usage, areas of interest and desire to debate" from December 2015 showed that users of social media are generally reluctant to like, comment on or share most items except for family/friends and, up to a point, interests/hobbies.

We also saw that the different age groups have quite different interests on social media:

The 12–18-year-old users of social media's Top 3:

- **40.9 % of the age group access/read about friends/family on social media**
- **38.2 % access/read about entertainment**
- **37.4 % access/read about interests/hobbies**

The 71+-year-old users of social media's Top 3:

- **Other news, which 40.8 % of the age group access/read about on social media**
- **Politics – Danish and international, which 39.4 % access/read**
- **War, disasters, crime, which 34.3 % access/read**

The survey also revealed that it is certainly not on social media that the general population debates political issues. In fact, just under 6 % of users of social media were willing to discuss a political issue on social media. In comparison, just under 45 % were willing to discuss a political issue together with a good friend at home.

Again, there is variation across the age groups regarding the desire to debate on social media – it is greatest among the youngest and gradually decreases with increasing age. So

- 12 % of **12–18s** were very willing and 18 % somewhat willing to participate in the debate on social media.
- 1 % of **71+** were very willing and 3 % somewhat willing to participate in the debate on social media.

Generally speaking, the desire to debate is also greatest when we debate with people whose opinions we know. And we are not all that familiar with each other's opinions on social media. Conversely, a finding of the study also shows that those who have a profile on social media were, in all social situations uncovered in the study, more willing to participate in the debate than people without a profile on social media.

In connection with the publication of the report on social media, Professor Stig Hjarvard wrote an article about this "spiral of silence" on social media in *Kommunikationsforum*, an online trade publication for people interested in communication.

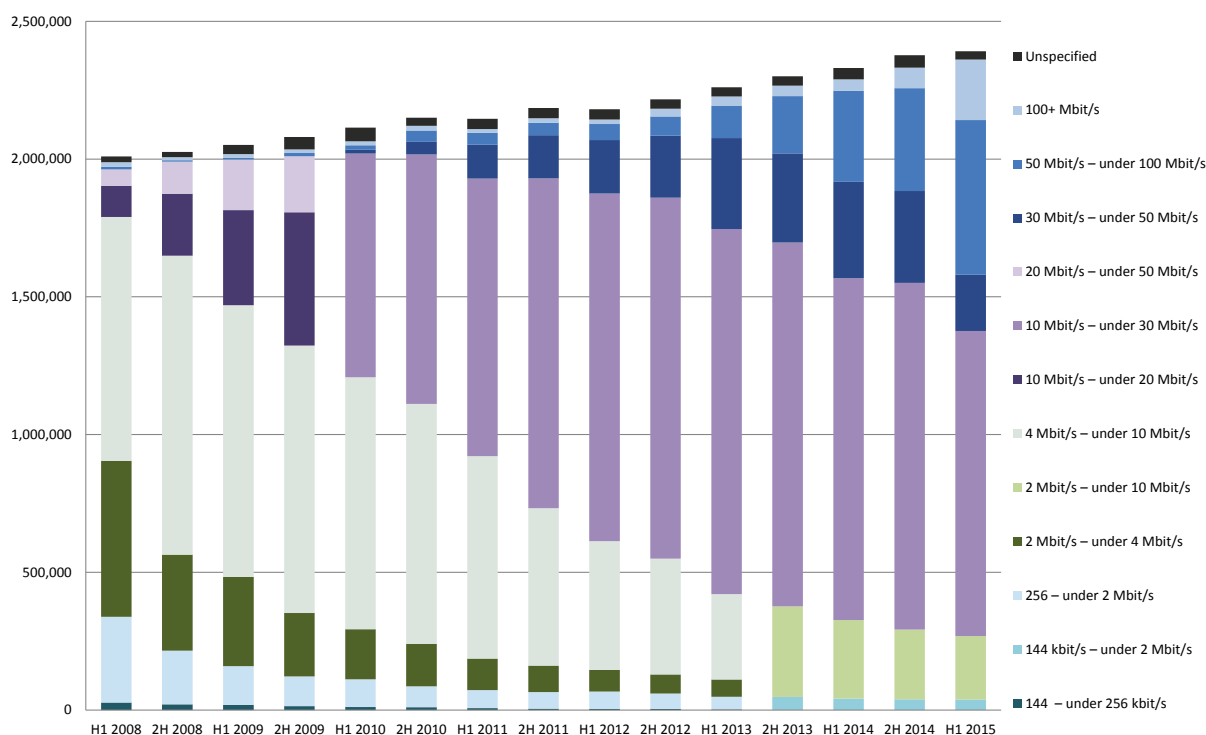
Read more in the section on internet usage and devices on the report's website.

5 Internet speeds and mobile data consumption – the increase continues

An essential prerequisite for the development of media consumption with increasing use of all the possibilities offered by the internet is that consumers have the necessary internet capacity to be able to use the increasingly resource-intensive internet services – even when on the move.

As shown in Figure 26 below, with a few exceptions, there has been an almost constant increase in the number of broadband subscriptions from H1 2008 to H1 2015, from a total of 2,009,526 subscriptions in H1 2008 to 2,391,617 in H1 2015 – an increase of 382,091 or 19 % during the period. The rate of increase has, however, slowed slightly from H2 2014 to H1 2015, as the increase here is just 0.6 %. The previous half-year, the increase was 2 %. The figure also shows that the number of broadband subscriptions with increasing downstream capacity – right up to 100 Mbit/s and above – is rising sharply. So, the number of broadband subscriptions with a downstream capacity of 100 Mbit/s increased by almost 200 % from H2 2014 to H1 2015.

Figure 26: Internet: Broadband subscriptions by downstream capacity – development from 2008–2015

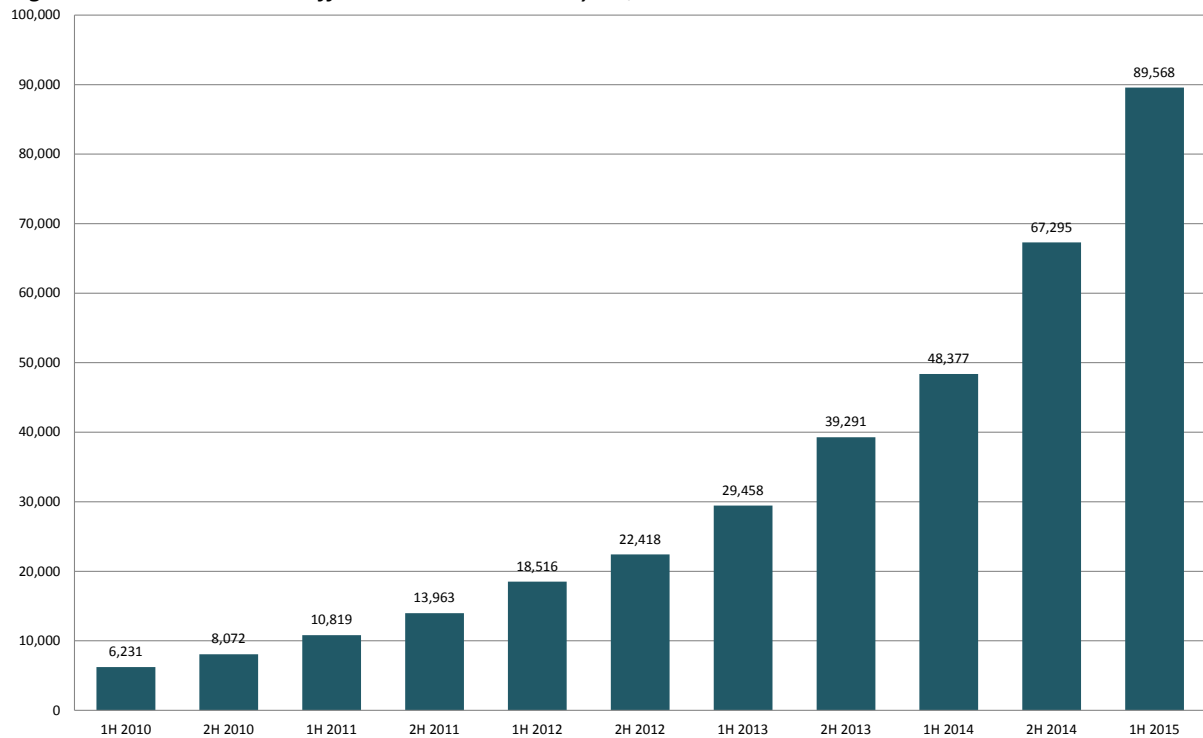


Source: The Danish Energy Agency – Telecom statistics H1 2015
Data processed by the Danish Agency for Culture and Palaces

An indicator that media consumption has very much become mobile might be the data traffic on mobile broadband. And things are moving fast here. There is, as shown in Figure 27 below, an almost exponential growth in data traffic on mobile broadband at present. With a few ex-

ceptions, the increases in data traffic have grown from one half-year to the next. Every half-year, mobile data traffic has on average increased by just over 30 % during the period. Over the entire period from H1 2010 up to and including H1 2015, mobile data traffic has increased by 1,338 %.

Figure 27: Mobile data traffic measured in terabytes, H1 2008–H1 2015



Source: The Danish Energy Agency – Telecom statistics H1 2015
Data processed by the Danish Agency for Culture and Palaces

1 TERABYTE = 1,048,576 MB

An important parameter in relation to media development is whether the increasing internet speeds are actually available and can thus be purchased by all.

Table 14 below shows the coverage for homes and businesses with high-speed broadband (100 Mbit/s download and 30 Mbit/s upload) throughout Denmark and the five regions in 2014 and 2015. In general, 84 % of all homes and businesses in Denmark have access to (i.e. technical coverage of) at least 100 Mbit/s download and 30 Mbit/s upload in 2015. The highest coverage is in the Region of Southern Denmark, with 89 % of all homes and businesses with 100 Mbit/s download and 89 % with 30 Mbit/s upload. The lowest coverage is in Region Zealand (with 72 % and 68 % respectively) and the North Denmark Region (with 81 % and 80 % respectively). 95 % of all homes and businesses have access to ADSL broadband of at least 10 Mbit/s download and 1 Mbit/s upload. There have been small increases in the technical coverage in relation to 100 Mbit/s download from 2014–2015 – the biggest increase in North Denmark Region – while there have been far greater increases in relation to 30 Mbit/s upload from 2014 to 2015 – most notably in the Capital Region of Denmark (from 56 % to 84 %) but also in Region Zealand (from 50 % to 68 %).

Table 14: High-speed broadband coverage by region for homes and businesses, 2014–2015

	2014	2015	2014	2015
	100 Mbit/s download		30 Mbit/s upload	
Throughout Denmark	83 %	84 %	64 %	83 %
North Denmark Region	77 %	81 %	67 %	80 %
Central Denmark Region	84 %	86 %	71 %	87 %
Region of Southern Denmark	87 %	89 %	74 %	89 %
Region Zealand	71 %	72 %	50 %	68 %
Capital Region of Denmark	85 %	85 %	56 %	84 %

Source: The Danish Energy Agency – Broadband coverage in Denmark 2015. Data processed by the Danish Agency for Culture and Palaces. The table contains figures for speeds that are technically possible. "Technically possible speeds" means speeds that telecom operators are able to offer if they wish.

6 It is expensive to keep up: Household media-related consumption continues to increase

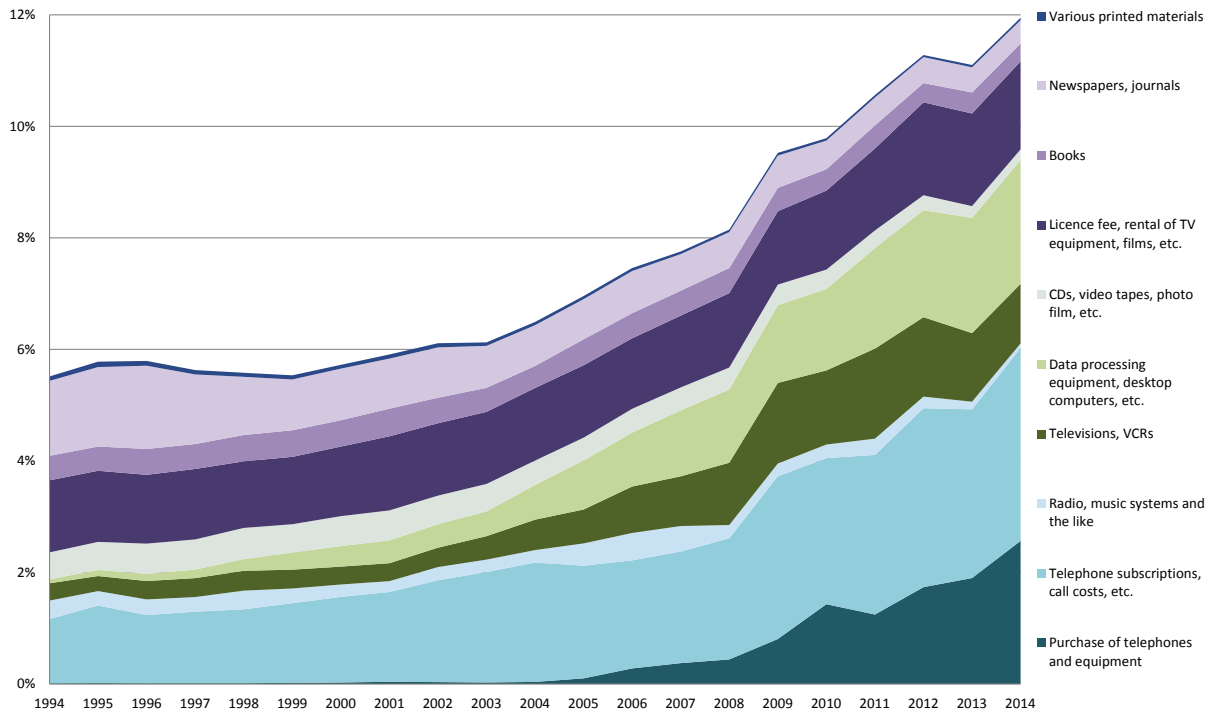
6.1 Household media-related consumption – all households

Previous editions of the Report on media development in Denmark have described just how important the media are to our society and democracy. The media are an important source of knowledge and learning that help to mould Danish society and Danish lives. The media are also an important platform for the dialogue that develops and moves society. The internet cannot in itself be regarded as a "medium" in the more classic sense, but it has become a vital infrastructure through which we not only consume media, but also communicate with each other and – in the highly digitised Danish society – with public institutions.

The fact that the media and the internet represent such an important part of our democratic society, coupled with the impact technological advances have had on the media, media development and media consumption in general, makes it pertinent to examine the costs associated with having access to and using the media, the internet, etc. And it has by no means become cheaper over the years for households to keep up.

In 1994, the cost of media-related items was around 5.5 % of total household consumption. In 2014, this share has increased to approximately 11.9 % – an increase of 6.4 percentage points. Even in times of crisis, the consumption of media-related items has increased quite sharply. From a total of around DKK 13,122 a year in 1994, in 2014, DKK 33,903 a year (in real terms) was spent on media-related items. This corresponds to an increase of more than 158 %.

Figure 28: The media-related items' share (%) of total household consumption (in real terms)

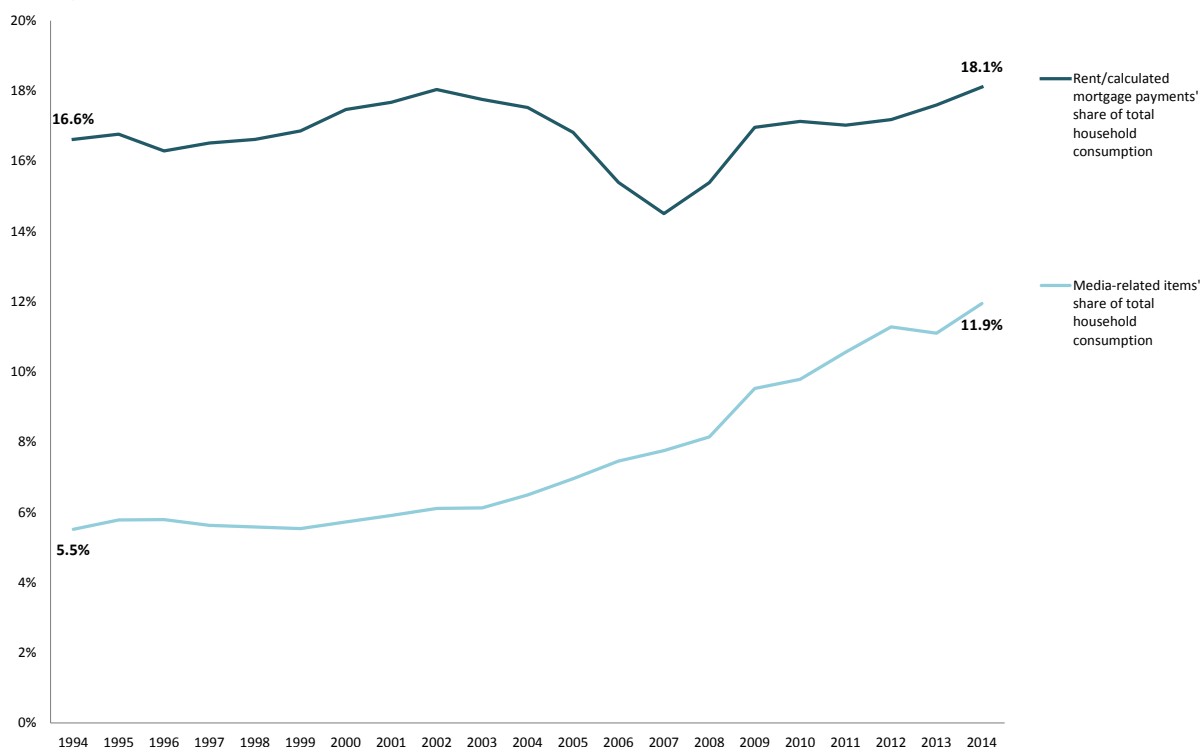


Source: Statistics Denmark/www.statistikbanken.dk/FUS, Table FUS: Annual household consumption by type of consumption, household groups and price unit
 Data processed by the Danish Agency for Culture and Palaces
 Universe: Danish households
 Real terms, including VAT, data collected over 3 years and converted to the middle year

By comparison, the items "rent/mortgage payments of owner-occupied dwellings" represent 16.6 % of households' total consumption (corresponding to DKK 39,541) in 1994. In 2014, this share increased to 18.1 % (DKK 51,403) – an increase of 1.5 percentage points, or a 30 % increase in the amount spent on this item.

So there is a very small increase in the *share* of total household consumption represented by rent/mortgage payments compared to the increase in the *share* represented by spending on media-related items. See Figure 29 below.

Figure 29: Selected consumption items' share (%) of total household consumption (in real terms) – 1994–2014



Source: Statistics Denmark/www.statistikbanken.dk/FUS, Table FUS: Annual household consumption by type of consumption, household groups and price unit
Data processed by the Danish Agency for Culture and Palaces

Universe: Danish households
Real terms, including VAT, data collected over 3 years and converted to the middle year

The figures in the above figures showing household consumption were collected over a three-year period up to and including 2013 and converted to the middle year. From 2014, the data was collected over two years, although the random sample has been extended. 2014 is the most current data available from Statistics Denmark.

The media-related items which increased most from 1994 to 2014 are:

- 1) "**Purchase of telephones and equipment**", which has shown a dramatic increase, not only over the entire period from 1994 to 2014, but also just during the past year. From 1994–2014, when total household consumption rose by 19.3 %, spending on telephones and equipment increased by more than 22,000 %. From 2013–2014, when total consumption rose by 0.8 %, this item increased by more than 36 %. In 1994, households spent just under DKK 33 on this item (0.01 % of total consumption). In 2014, they spent just over DKK 7,284 on this item (2.57 % of total consumption).
- 2) "**Data processing equipment, desktop computers, etc.**", which have increased from 0.07 % (DKK 168.8) to 2.22 % (DKK 6,301.8)
- 3) "**Televisions, VCRs**", which have increased from 0.31 % (DKK 740.4) to 1.07 % (DKK 3,030.3)
- 4) "**Telephone subscriptions, call costs, etc.**", which have increased from a share of 1.15 % (DKK 2,742.4) to a share of 3.46 % (DKK 9,814.9)
- 5) "**Newspapers, journals**", which have fallen from a share of 1.34 % (DKK 3,197.4) to a share of 0.42 % (DKK 1,189.3)

The figures for media-related items can be found in Table 15 below.

Table 15: Total household consumption and consumption of media-related items in DKK (real terms) from 1994–2014

	1994	2013	2014	Change in %		Change in DKK	
				2013-2014	1994-2014	2013-2014	1994-2014
TOTAL CONSUMPTION	237,891.3	281,560.1	283,768.5	0.8 %	19.3 %	2,208.4	45,877.2
Purchase of telephones and equipment	32.6	5,353.1	7,284.3	36.1 %	22,244.5 %	1,931.2	7,251.7
Telephone subscription, call costs, etc.	2,742.4	8,517.0	9,814.9	15.2 %	257.9 %	1,297.9	7,072.5
Radio, music systems and the like	785.4	384.6	231.8	-39.7 %	-70.5 %	-152.8	-553.6
Televisions, VCRs	740.4	3,464.3	3,030.3	-12.5 %	309.3 %	-434.0	2,289.9
Data processing equipment, desktop computers, etc.	168.3	5,816.1	6,301.8	8.4 %	3,644.4 %	485.7	6,133.5
CDs, video tapes, photo film, etc.	1,148.1	594.1	542.4	-8.7 %	-52.8 %	-51.7	-605.7
Licence fee, rental of TV equipment, films, etc.	3,074.3	4,676.2	4,476.5	-4.3 %	45.6 %	-199.7	1,402.2
Books	1,044.6	1,060.2	905.3	-14.6 %	-13.3 %	-154.9	-139.3
Newspapers, journals	3,197.4	1,270.3	1,189.3	-6.4 %	-62.8 %	-81.0	-2,008.1
Various printed materials	188.0	116.9	126.1	7.9 %	-32.9 %	9.2	-61.9
MEDIA-RELATED ITEMS IN TOTAL	13,121.5	31,252.8	33,902.7	8.5 %	158.4 %	2,649.9	20,781.2

Source: Statistics Denmark/www.statistikbanken.dk/FU5, Table FU5: Annual household consumption by type of consumption, household groups and price unit. Data processed by the Danish Agency for Culture and Palaces

6.2 Household media-related consumption by household income

Looking at the extent to which the budgets of households with different household incomes are affected by rising media costs, there is quite a considerable difference in the strain placed on the lowest and the highest household incomes by media-related items.

Households with a household income of less than DKK 150,000 spend less in DKK (real terms) than those with higher household incomes on media-related costs. However, media-related costs represent a far greater share (19 %) of total household consumption in households with the lowest household incomes in 2014 than in households with higher incomes. By comparison, the same costs in 2014 represent only around 10 % of total consumption of the households with the highest household incomes (DKK 800,000+).

Only in the period from 2010–2012 did households with a household income of less than DKK 150,000 spend more in DKK on media-related items than households with a household income of DKK 150,000 to DKK 299,999.

With the exception of the years from 2010–2012, households with the highest annual household incomes throughout the period from 1994–2014 spent more than twice as much money in DKK (real terms) than households with the lowest household incomes on media-related items (between 2.1 and 2.5 times more money. In 2010–2012, it was between 1.7 and 1.9 times more). However, the share represented by these items of expenditure in the total consumption of the two household income groups was, in the same period, only around half as

much in the higher income bracket as in the lowest income bracket (over the entire period from 1994–2014 between 0.5 and 0.6, except in 2009 when the ratio was 0.7).

The growth in consumption of the media-related items, both in DKK and in the share of total consumption by household income, can be seen in Figure 30, Table 16 and Table 17 below.

Figure 30: The media-related items' share in % of total household consumption (in real terms) by household income. Household incomes of less than DKK 150,000 and DKK 800,000+ respectively

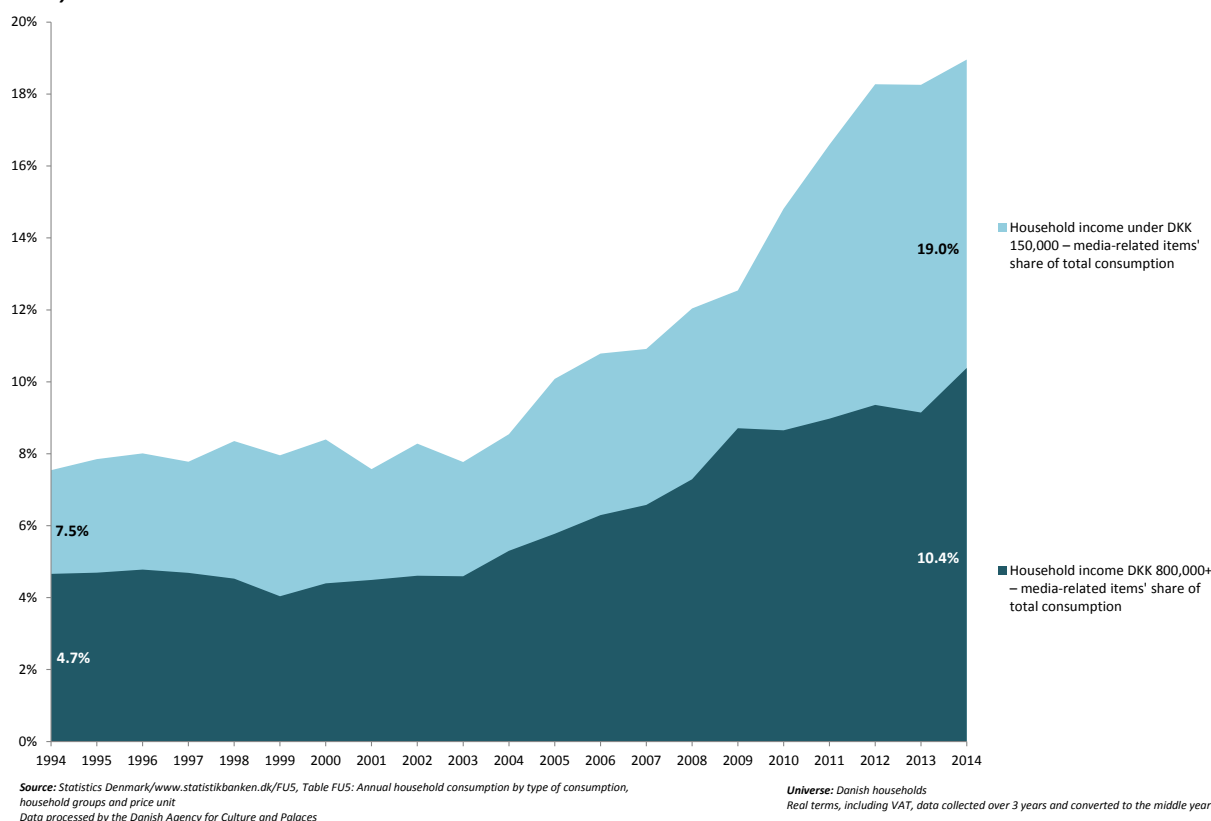


Table 16: The media-related items' share in % of total household consumption (in real terms) by household income

	Household income in DKK				
	Under 150,000	150,000-299,999	300,000-499,999	500,000-799,999	800,000+
1994	7.5 %	6.1 %	5.1 %	4.8 %	4.7 %
2004	8.5 %	7.8 %	7.1 %	5.9 %	5.3 %
2005	10.1 %	8.5 %	7.4 %	6.5 %	5.8 %
2006	10.8 %	9.2 %	8.2 %	7.0 %	6.3 %
2007	10.9 %	9.9 %	8.4 %	7.6 %	6.6 %
2008	12.0 %	9.3 %	9.2 %	7.9 %	7.3 %
2009	12.5 %	10.0 %	10.9 %	9.1 %	8.7 %
2010	14.8 %	10.3 %	11.1 %	9.6 %	8.7 %
2011	16.6 %	11.6 %	12.3 %	10.4 %	9.0 %
2012	18.3 %	13.1 %	12.9 %	11.4 %	9.4 %
2013	18.3 %	14.0 %	12.4 %	11.6 %	9.1 %
2014	19.0 %	14.4 %	12.9 %	12.3 %	10.4 %

Source: Statistics Denmark/www.statistikbanken.dk/FU5, Table FU5: Annual household consumption by type of consumption, household groups and price unit. Data processed by the Danish Agency for Culture and Palaces

Table 17: Media-related items in DKK (real terms) by household income

	Household income in DKK				
	Under 150,000	150,000-299,999	300,000-499,999	500,000-799,999	800,000+
1994	9,431.8	11,410.5	14,082.8	17,834.4	22,027.7
2004	9,802.6	12,673.3	16,782.6	19,824.3	23,088.7
2005	12,183.9	14,101.7	18,119.3	22,341.3	26,707.7
2006	13,507.9	15,760.9	20,597.5	23,920.1	32,007.5
2007	14,629.5	16,606.4	20,754.0	25,733.1	32,542.8
2008	14,596.6	15,099.9	21,248.7	25,669.0	34,584.9
2009	15,481.1	15,970.4	24,497.8	29,006.4	38,923.6
2010	20,954.1	16,540.4	26,408.8	31,444.1	39,968.5
2011	24,038.9	18,110.0	29,371.3	33,035.8	41,164.0
2012	25,047.3	20,497.4	29,879.1	35,245.3	43,048.3
2013	20,548.5	21,463.6	27,492.6	35,180.5	42,189.1
2014	20,955.9	22,630.7	28,684.9	36,991.3	47,640.1

Source: Statistics Denmark/www.statistikbanken.dk/FU5, Table FU5: Annual household consumption by type of consumption, household groups and price unit. Data processed by the Danish Agency for Culture and Palaces

6.3 Household consumption of licence fee and newspapers: Newspapers are squeezed into the household budget

If we separate the licence fee section from the consumption category "Licence fee, rental of television equipment, films, etc.", we can see that in real terms, i.e. adjusted for inflation, there is an increase throughout the period from 1994–2014 of DKK 148 in the amount households spend on licence fee per year, or an increase of approximately 8.3 % in 20 years. In the same period, there was an increase of 19.3 % in total household consumption. In real terms, the licence fee has therefore remained relatively stable and increased less than total household consumption. For the sake of comparison, the share of "Licence fee, rental of television equipment, films, etc.", represented by "Hybrid network, cable TV, cable service provider and the like", has increased by around DKK 1,733 or just under 223 % in the period from 1994–2014.

In the same way as for licence fee, the consumption of newspapers by means of subscription and single-copy sales has been separated from the overall category "Newspapers, magazines" in the period from 1994–2014.

In real terms, the consumption of newspaper subscriptions has fallen by DKK 412 per year over the entire period from 1994 to 2014 – a decline of just over 39 %.

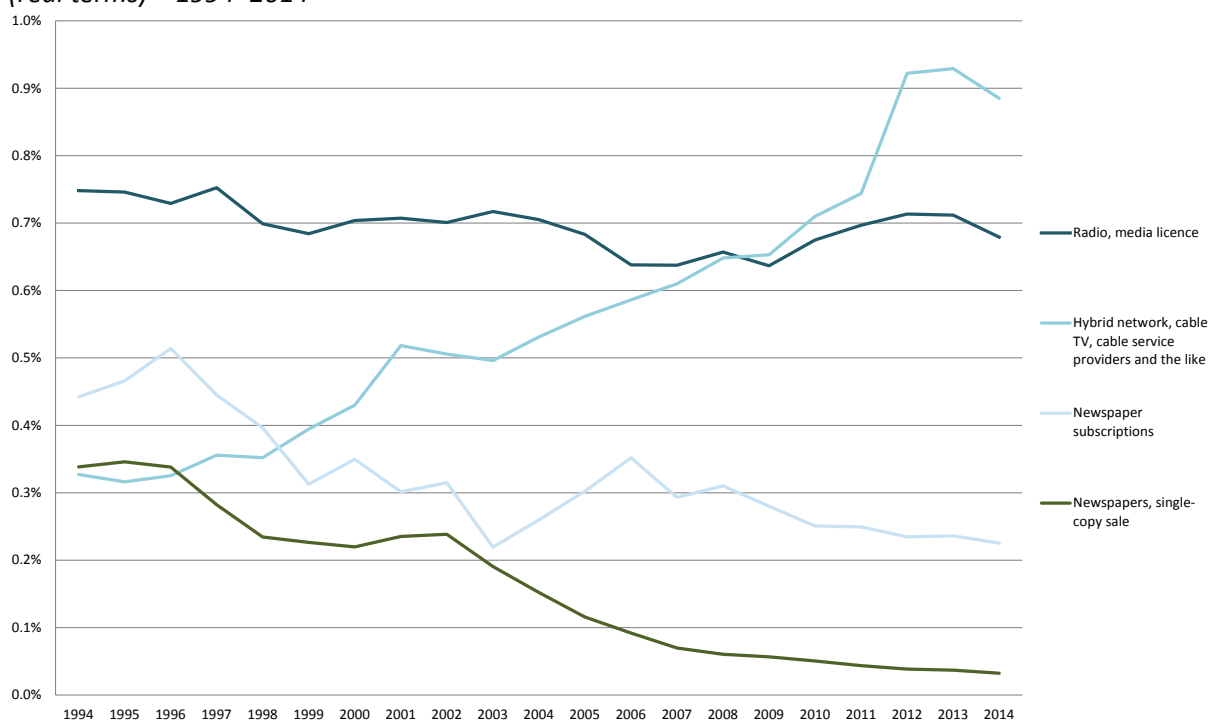
Single-copy sales of newspapers have been hit particularly hard. In real terms, single-copy sales have fallen by just over DKK 713, or almost 89 % from 1994 to 2014.

Table 18: Annual household consumption in DKK (real terms) in total and on licence fee, hybrid network, etc., as well as newspaper subscriptions and single-copy sale of newspapers in 1994 and 2013–2014, All households

	1994	2013	2014	2013-2014		1994-2014	
				Change in DKK	Change in %	Change in DKK	Change in %
HOUSEHOLD CONSUMPTION IN TOTAL	237,891.3	281,560.1	283,768.5	2,208.4	0.8 %	45,877.2	19.3 %
Licence fee, rental of TV equipment, films, etc., of which:	3,074.3	4,676.2	4,476.5	-199.7	-4.3 %	1,402.2	45.6 %
• Radio, media licence	1,779.5	2,004.1	1,927.5	-76.5	-3.8 %	148.0	8.3 %
<i>Share of the total</i>	57.9 %	42.9 %	43.1 %	-	-	-	-
• Hybrid network, cable TV, cable service providers and the like	778.1	2,616.4	2,511.3	-105.1	-4.0 %	1,733.2	222.7 %
<i>Share of the total</i>	25.3 %	56.0 %	56.1 %	-	-	-	-
Newspapers, journals, of which:	3,197.4	1,270.3	1,189.3	-81.0	-6.4 %	-2,008.1	-62.8 %
• Newspaper subscriptions	1,051.7	664.3	639.3	-25.0	-3.8 %	-412.4	-39.2 %
• Newspapers, single-copy sale	804.9	103.5	92.1	-11.4	-11.0 %	-712.8	-88.6 %

Source: Statistics Denmark/www.statistikbanken.dk/FU5, Table FU5: Annual household consumption by type of consumption, household groups and price unit. Data processed by the Danish Agency for Culture and Palaces. Universe: Danish households, data collected over 3 years and converted to the middle year. From 2014, the data is collected over two years but in a larger random sample

Figure 31: Licence fee, hybrid network/cable TV/cable service providers and the like, Newspaper subscriptions and Single-copy sales of newspapers in % of total household consumption (real terms) – 1994–2014



Source: Statistics Denmark/www.statistikbanken.dk/FU5, Table FU5: Annual household consumption by type of consumption, household groups and price unit. Data processed by the Danish Agency for Culture and Palaces

Universe: Danish households. Real terms, including VAT, data collected over 3 years and converted to the middle year

If we compare the growth in consumption of licence fee and newspapers with the growth in total household consumption in real terms, we can see that licence fee essentially follow the same trend as total consumption, while the development in newspaper subscriptions – and single-copy sales of newspapers in particular – differs somewhat from general consumption.

Generally speaking, the number of licence fee payers has followed the trend in the number of households. However, in 2009, the option of monthly licence fee payment was introduced, prompting 50,000 households to sign up for licence fee payment. More single households have been added in recent years, and the number of pensioners that qualify for a reduced licence fee is also falling (Source: *DR Licens*). This may help explain the upward trend with regard to licences from 2008. The increase is slightly higher than the growth in total consumption. However, from 2013–2014, there is a downward trend for both licences and hybrid network/cable TV's share of total consumption.

The fact that printed newspapers have been so badly affected in relation to the annual amount households spend on these items, as shown in Figure 31 above, can probably largely be attributed to the extent to which media usage has migrated online. So it is also relevant to look at how media users have access to the media content they consume on the internet, and not least how they respond to a demand for payment for the content they wish to access. Naturally, payment for online consumption represents some of the media companies' revenue base.

From the Danish Agency for Culture and Palaces' special report on "Media usage on the internet – streaming, content and access" from December 2015, we know that almost half of the Danish population (49 %) aged 12+ has a paid subscription to stream programmes/films/series via streaming services such as Netflix and HBO. In addition, just under 24 % have a paid subscription to stream programmes/films/series from TV stations, and just under 22 % have subscribed to a music streaming service.

Only around 14 % have a subscription to read newspapers/magazines online, while just over 53 % say they have free access to newspapers/magazines online. By comparison, only around 10 % say that they have free access to a streaming service such as Netflix and HBO.

But what do users do when faced with a demand for payment for content that is important to them on websites when they do not already have a subscription?

The special report on media usage on the internet showed that it can be quite a challenge to get internet users to part with their cash, at least when it comes to *information* at any rate – even when the information is important to them. When internet users face being charged for online content, their most common reaction is to find the information on other websites, and thus avoid having to pay for it. 33 % usually do this. 19.3 % say they do it occasionally, while 9.6 % have done it a few times.

The second-most common reaction when encountering demands for payment for online content is that people abandon their search if they cannot find the information elsewhere. 19.9 % say this is what they usually do, 15.2 % say that they do it occasionally, while 12.9 % have done it a few times.

Only 3.6 % say they usually purchase access if they cannot find the information elsewhere, and a negligible 1.3 % say they usually purchase access immediately.

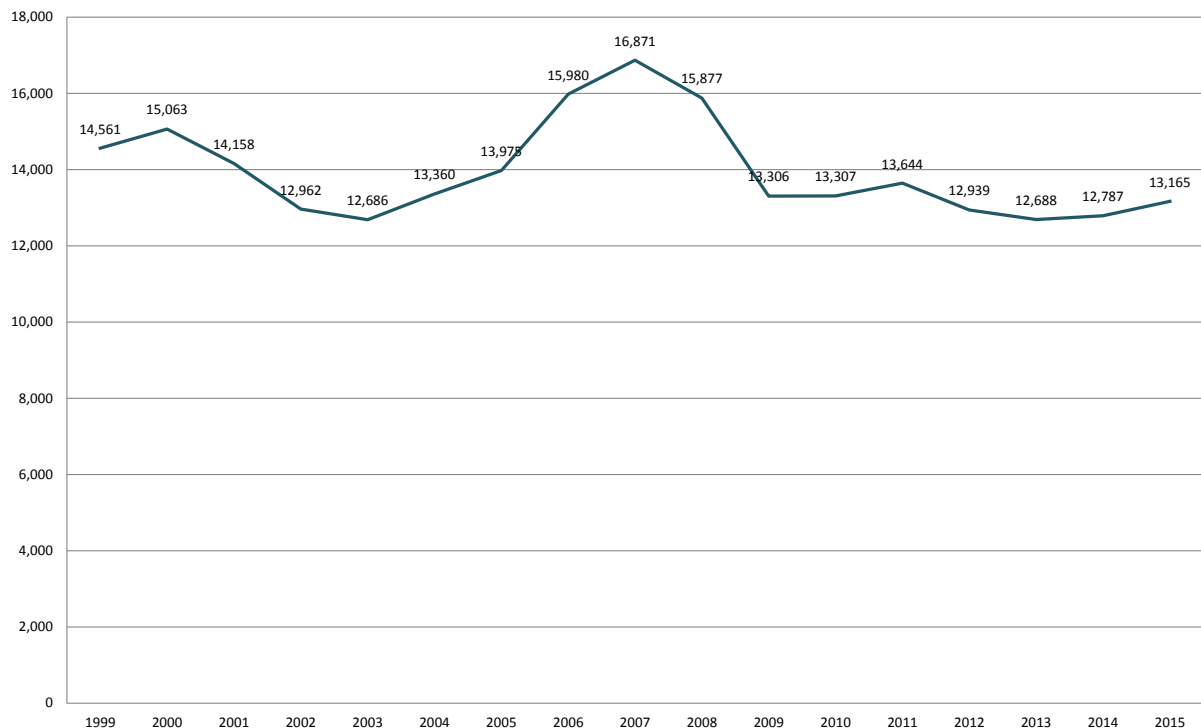
7 Industry: Ad spend and ad revenue to foreign companies

The sections above describe how household consumption of media-related items has evolved since 1994, both as a whole and broken down by sub-items. Another important element in the economics of media companies is ad spend, which might be described as an important part of corporate expenditure on "media-related items".

Economic conditions in the period from 1999–2015 are to some extent reflected in ad revenue. The impact of the socio-economic crises, including the bursting of the IT bubble in 2000, which affected ad revenue until 2004, is also reflected in the curve. Ad revenue increased from 2004 until 2007, when property prices were at their highest. From the end of 2008, the financial crisis took off in earnest in Denmark, which is quite evident from the curves in Figure 32 below.

Since 2013, when ad revenue was at DKK 12,688 million, there has been a slight increase in ad revenue measured in real terms (i.e. adjusted for inflation), and, in 2015, ad revenue was at DKK 13,165 million. However, this is still well below the ad revenue of DKK 16,871 million reached in 2007.

Figure 32: Total ad revenue 2015 in real terms (in MDKK) 1999–2015



Source: Ad spend survey – The Danish advertising market, prepared by Dansk Reklameforbrugsundersøgelse (The Danish Advertising Expenditure Survey), measured in real terms: Statistics Denmark, Consumer price index (Base year: 2015)
Data processed by the Danish Agency for Culture and Palaces

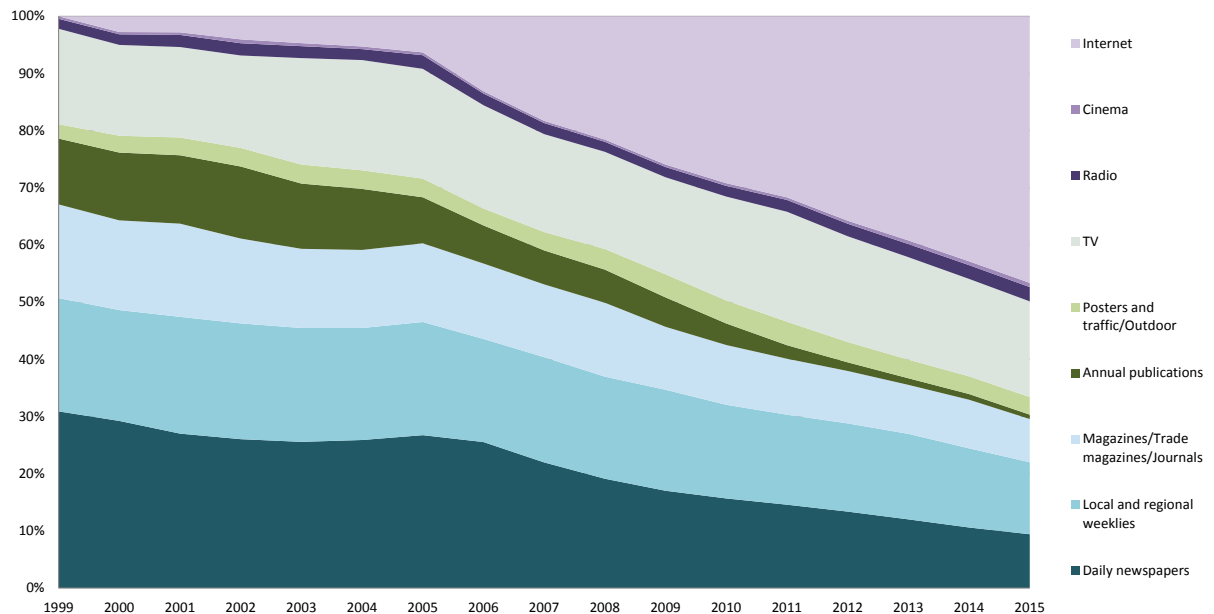
If we look at how ad spend is distributed in the different media groups, Figure 33 below shows that some media groups were not only hit by the economic situation, as shown in Figure 32

above, but were also severely affected by technological advances, which, with the rise of the internet and the migration of media consumption to digital platforms, have resulted in a considerable shift in the distribution of advertising kroner among media groups.

In 2000, internet advertising represented just under 3 % of total ad revenue, and until 2005, was a relatively small advertising medium. However, since 2005, it has very much gained momentum, and in 2015, internet advertising represented almost 47 % of total ad revenue. Print media were particularly badly hit by this development, while the TV media's share of corporate advertising budgets is relatively constant throughout the period – between 16 % and 19 %. Radio has also remained constant throughout the period, with a share of 2 % of total ad revenue, and cinemas represented between 0.4 % and 0.7 % of total ad revenue in the period.

The local and regional weeklies' share of total ad revenue has not fallen to quite the same extent as other print media groups. Throughout the period from 1999–2005, local papers represented around 20 % of ad revenue, but the figure has since gradually fallen to just under 13 % in 2015. Newspapers are badly affected in a different way. In 1999, they were the largest advertising medium, representing almost 31 % of total advertising. In 2015, this share has fallen to just over 9 %. So both in terms of readership and ad revenue, the print media – newspapers in particular – have been severely affected by media developments. Annual publications (yearbooks, trade calendars, catalogues, business directories, telephone directories and local directories) have also experienced an exceptionally sharp decline in their share of total ad revenue: from 11.5 % in 1999 to 0.8 % in 2015.

Figure 33: Ad revenue by media and time (in real terms, 2015) – distribution of ad spend by media types from 1999–2015 (share of total ad revenue in %)



Source: Ad spend survey – The Danish advertising market, prepared by Dansk Reklameforbrugsundersøgelse (The Danish Advertising Expenditure Survey), measured in real terms: Statistics Denmark, Consumer price index (Base year: 2015)
Data processed by the Danish Agency for Culture and Palaces

A significant factor in relation to the financing of media content in Denmark – perhaps publicistic content in particular – is how large a share of the advertising aimed at the Danish market goes to foreign companies, which do not produce Danish publicistic content. The greater the share of ad revenue going to foreign companies, the lower the share to produce media content in Denmark.

As shown in Table 19 below, the share of total ad revenue aimed at Denmark but which goes to foreign companies has grown from 3 % in 2007 to 26 % in 2015. If we look solely at ad revenue on the internet, since 2013, a greater share (51 %) of the advertising has gone to foreign companies than to Danish companies. In 2015, 56 % has gone to foreign companies. The corresponding share in 2007 was 19 %.

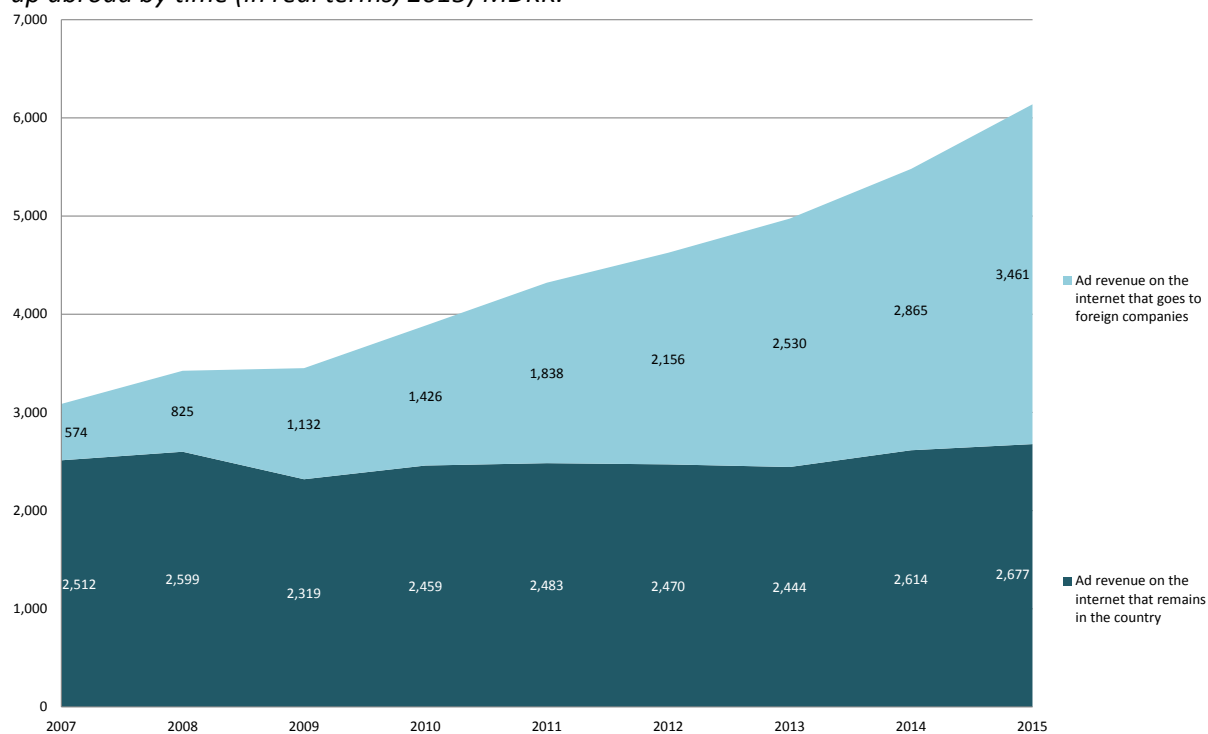
Table 19: Share of total ad revenue in Denmark that ends up abroad – 2007–2015

	2007	2008	2009	2010	2011	2012	2013	2014	2015
Share of ad revenue in Denmark that ends up abroad	3 %	5 %	9 %	11 %	13 %	17 %	20 %	22 %	26 %
Share of internet ad revenue in Denmark that ends up abroad	19 %	24 %	33 %	37 %	43 %	47 %	51 %	52 %	56 %

Source: Danske Medier Research for the Danish Agency for Culture and Palaces, own calculations
Data processed by the Danish Agency for Culture and Palaces

Measured in DKK in real terms, the difference in internet revenue taken by Danish and foreign companies respectively is pronounced, as evidenced by Figure 34 below. While, in real terms, the Danish share of internet ad revenue in the period from 2007–2015 is relatively stable, there is a marked increase in the share of ad revenue taken by foreign companies.

Figure 34: Developments in internet ad revenue which remains in the country and which ends up abroad by time (in real terms, 2015) MDKK.



Source: Danske Medier Research for the Danish Agency for Culture and Palaces, own calculations
Data processed by the Danish Agency for Culture and Palaces

Read more in the section on industry and consumption on the report's website.

8 The special reports – the main conclusions

In December 2015, three special reports were published under the Report on media development in Denmark. A brief summary follows of the main conclusions of these three reports.

8.1 Media usage on the internet – streaming, content and access

In the report "Media usage on the internet", the Danish Agency for Culture and Palaces examines a number of issues relating to our behaviour on the internet. Among other things, it contains the answers to how often we stream different types of media and content online, how many people have a subscription to streaming services such as Netflix and HBO, and what we do when we encounter a paywall.

The report shows that it is now only a small share of the population that does not stream or read media content online to some extent. Just less than 18 % of those who have internet access never stream programmes, films, series, radio or music, or read newspapers/magazines on the internet.

One of the main conclusions of the report is that age is the most decisive factor in the behaviour of users on the Internet. Overall, use of internet features is most prevalent among the youngest members of the population. The youngest age groups have the highest media consumption on the internet, and there is a clear trend that consumption falls as age increases.

The willingness of Danes to pay for internet content depends largely on the type of content in question. Nearly half of the Danish population has a subscription to streaming services such as Netflix and HBO, while only about 14 % have a subscription to read newspapers and magazines online. If Danes encounter a demand for payment for online content that is important to them, one third will find the information elsewhere to avoid paying for it, while just under 20 % will drop the search if they cannot find the content elsewhere.

Find the report on Media usage on the internet [here](#).

8.2 Social media – usage, areas of interest and desire to debate

In this report, the Danish Agency for Culture and Palaces focuses on the use of social media in Denmark. The main points of interest relate to the social media we use, the topics that interest and involve users, and how things stand in respect of the desire to debate on social media when the topic is of a more political nature.

The report concludes that women and young people in particular are the biggest consumers of social media. Among the youngest group of 16–19s, the share that uses social media is almost nine times as high as among the 85–89s.

Only very few topics on social media get users to like, comment or share content. This kind of involvement is more common if the topic relates to the users' close acquaintances such as friends and family, or interests/hobbies.

People seem to prefer to debate the more political issues elsewhere than on the social media. It is actually the social context in which the desire/willingness to debate is lowest, compared to the other options at any rate. This can be explained by the fact that the willingness to participate in a thread about a political issue is greatest if people think they agree with those with whom they are having the discussion. They must at least be aware of the opinions of others in the network, which is difficult to clarify on social media, but easier among the closest relationships.

Find the report on social media here.

8.3 Media literacy in a Danish context

The Danish Agency for Culture's report "Media Literacy in a Danish context" focuses on the Danes' ability to hold their own in the digital world, and examines media literacy as a prerequisite for engaged citizenship and civic participation.

The multiple and growing options offered by the fragmented and complicated media reality impose ever greater demands on the Danish people. Life as an active citizen presupposes an ability to use and decode the media. It is through the media that we keep ourselves informed about society and make our opinions known and be heard, both as private individuals and in the political debate. The study shows that Danes are generally good at using both conventional and new media. The vast majority are competent media users. However, Danes tend to be uncritical in terms of what happens with their digital footprints and data, and certain social groups in particular are finding it difficult to keep up with digitisation.

Most people's media use is determined by their everyday lives. The respondents were especially interested in local affairs and issues, and what affects them in their everyday lives – not necessarily major social debates. People prioritise a good, quiet home life. Many people use the media mainly to deal with everyday life, i.e. for information and communication. Danes are competent up to a point, but do not ask many questions or make use of all the options offered by the media, including the chance to participate actively in public debate.

The report is a study prepared by the IT University of Copenhagen for the Danish Agency for Culture and the Media Council for Children and Young People in Denmark and aims to suggest how best to measure media literacy levels in the Danish population. The study is based on interviews with 20 Danish families, observations of the families' everyday lives as well as visits to schools, workplaces, IT courses for the elderly and online discussion forums.

Find the report on media literacy in a Danish context here.

9 Method

9.1 Note to section 2 of Summary and Discourse 2016

Regarding the figures in section 2 of Summary and discourse 2016, note the following:

1. For all the different types of media, the study refers to the 16–89 age group as it is this age group that is included in all measurements and studies. In subsequent sub-sections regarding the individual media in this summary and in sub-chapters of the other reports, the age range referred to is the group referred to in the measurement of the specific medium in question (e.g. 3+ for TV, 12+ for radio and print media, etc.).
2. The figures in the figures in section 2 were obtained from the various official, industry-recognised measurements of consumption on the different platforms, and surveys from Statistics Denmark. This means that all the figures derive from different random samples and were collected using different data collection methods. They are thus not strictly comparable but represent the most accurate figures for consumption on each their own platform.
3. The figures show *shares* that have engaged in a particular activity, but do not say anything as such about the extent – i.e. how much or for how long – they were engaged in the activity concerned.

For television and radio, the figures show the average daily reach (AvReach%) – the share that watched or listened to at least five consecutive minutes in the course of one day. For newspapers, the figures show the average daily reach – i.e. the share that on average reads a newspaper on a daily basis.

However, for the local weeklies, the figures show the average weekly reach.

The figure for internet use is the share that responded that they have used the internet daily or almost daily in the past three months, while the figure for streaming of films/series/TV programmes is the share that responded that they stream daily or almost daily.

Lastly, the figures for daily use of web media are based on a calculated average for the whole of 2015. It is not until 2015 that it has been possible to extract total figures across platforms. So, for web media usage, there are only figures for 2015 and not before. The figures for web usage do not include figures on the use of/traffic via apps, as this is not measured.

Until December 2013, Gallup/TV-Meter measured only the conventional viewing of linear (flow) TV in Denmark. This means that the figures for TV viewing basically do not contain results for TV viewing on other platforms and via new on-demand providers and streaming services such as YouTube, Netflix and HBO Nordic. From 1 December 2013, TV viewing on computers (PC and MAC) is included in the measurement but cannot be shown separately. However, part only of viewing on computers is included in the measurements because only viewing up to around a week after broadcasting on television is included.

Media groups in the section on web traffic in the summary include the following aggregated titles (sites):

Main media groups	Individual media
Independent internet media:	180grader.dk, altinget.dk, avisen.dk, dagens.dk, denkorsteavis.dk, dknyt.dk, newsbreak.dk, raeson.dk
Free papers:	mx.dk
National dailies – All:	berlingske.dk, borsen.dk, bt.dk, business.dk, eb.dk, information.dk, jp.dk, kristeligt-dagblad.dk, politiken.dk
National public service:	dr.dk, tv2.dk
Local (weekly) papers:	dinby.dk, lokalavisen.dk, minby.dk, ugeavisen.dk
Regional public service:	tv2fyn.dk, tv2lorry.dk, tv2nord.dk, tv2oj.dk, tveast.dk, tvmidtvest.dk, tvsyd.dk
Regional dailies:	amtsavisen.dk, aoh.dk, dagbladet-holstebro-struer.dk, dagbladetskjern.dk, folkebladetlemvig.dk, folketidende.dk, frdb.dk, fyens.dk, helsingordagblad.dk, hsfo.dk, jv.dk, mja.dk, nordjyske.dk, sn.dk, stiften.dk, vafo.dk, viborgfolkeblad.dk

Individual media aggregated to media groups in GemiusAudience 2015

10 Sources and use of results

The figures in the summary are derived from:

TV viewing: Gallup/TV-Meter

Radio listening: Gallup/Radio-Meter

Listening to commercial local radio: TNS Gallup Lokal Index

Newspaper reading: Index Danmark/Gallup

Local weekly papers: Lokal Index Danmark/Gallup

Internet traffic on the media: Gemius Explorer/Gemius Audience Research

Internet use, general: Statistics Denmark

Industry economy and employment: Special data from Statistics Denmark

Household consumption: Statistics Denmark – extracts from StatBank Denmark (FU5) and special data from Statistics Denmark

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In the event of any use of data, the original source, e.g. Gallup/Index Danmark (and base), Statistics Denmark (and tables), etc., as well as the Danish Agency for Culture and Palaces, Report on media development in Denmark 2016, must be stated. Resale or other commercial exploitation/utilisation of data is not permitted in any form.

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