SUMMARY 2015

Kulturstyrelsen • H. C. Andersens Boulevard 2 • DK-1553 København V
+45 3373 3373 • www.kulturstyrelsen.dk/medieudviklingen • medieudviklingen@kulturstyrelsen.dk

Contents

SUMMARY 2015

1. Introduction

This is the second edition of the Danish Agency For Culture's "Media Development in Denmark Report". The 2014 report laid the foundation and established a basic structure with a comprehensive amount of data on media consumption and the media industry in Denmark. Further work on and development of this basic structure was carried out in 2015.

The 2015 report includes local weekly newspapers, commercial local radio, the regional TV 2 stations, and non-commercial local TV, which were not covered by the 2014 report, and the measurements of web traffic now also covers the traffic on mobile and tablet devices. The report thus provides a more complete picture of the Danish media market – however, weekly magazines and magazines are not included in the report.

The external editorial panel of professionals has also this year provided advice with the creation of the report. The editorial panel consists of seven professional media experts, researchers and media sector representatives who have provided advice, development, prioritisation and quality assurance on and ongoing basis. To learn more about the editorial panel, go to the report's website and select "About the report".

In the summary, we select and compile the most important conclusions from the year's surveys – from the analyses of the use of media in Denmark, and from special reports, which have been carried out on Media Ethics, Journalistic Qualities and the Use of Media in Denmark.

The reporting, which is web-based and divided in a number of websites, will this year be divided into two main reports:

- **Current report published in June 2015.**
  This report consists of a large amount of data on media consumption based on the official measurements and figures from Statistics Denmark, etc. In the sections for TV, radio, newspapers/magazines, etc., there are major detailed analyses of the use of the relevant platforms – both by the population in general and by different segments of the population. The industry section covers a review of a number of the biggest media companies in Denmark, and also covers an analysis partly of Danish household media-related consumption expenditure, and partly of advertising turnover and foreign companies' share of advertising turnover that is aimed at the Danish market.

- **A report is expected to be published at the end of 2015.**
  This report will consist of a comprehensive industry analysis with a review of the media industry with sub-sectors in relation to a number of financials (turnover, employment, etc.). In addition, the autumn report will publish the results of a study of the population's behaviour on the internet including streaming, payment behaviour, "willingness to debate", etc.

2. The main points

- Danish household consumption expenditure spent on media-related items is increasing, and in 2012* it was 11.3 % of total household consumption expenditure, compared to 5.5 % in 1994.
- For Danish households with the lowest incomes (less than DKK 150,000 a year), consumption expenditure spent on media-related items in 2012 is 18.3 % of the total consumption expenditure, while in households with the highest incomes (DKK 800,000 and above), it accounts for 9.4 % of the total consumption expenditure.
- Internet speeds and mobile traffic is increasing almost exponentially. Mobile traffic, from the first six months of 2014 until the second six months of 2014, increased by 39.1 %.
- The daily TV viewing of traditional TV for people aged 12-18 has fallen by 46 minutes in two years. For the population in general, there has been a fall of 22 minutes over the two-year period.
- 12.1 % of the Danish population (people aged 16–89) stream film, series or TV programmes every day or almost every day.
- 37 % of the Danish population who use streaming services, and continue to have a traditional TV subscription, report that they have reduced their traditional TV viewing after they started using streaming, while 62% report that they watch as much traditional TV as they did before they started to use streaming services.
- The oldest (people aged 70 years old or older) people's daily radio listening has fallen by 43 minutes since 2008.
- Public service TV has increased its share from 55 % in 2013 to 58 % in 2014, and non-public service TV has lost share, from 40 % in 2013 to 39 % in 2014.
- Public service radio's share has fallen from 78 % in 2013 to 75 % in 2014, and commercial radio has increased its share, from 22 % in 2013 to 25 % in 2014.
- Reading of printed newspapers continues to fall: Daily newspapers as a single group have lost 25.7 % of readers over the period 2010–2014. Provincial daily newspapers have lost 26.9 % of readers and the national daily newspapers have lost 29.1 % during this period.
- The local weekly newspapers have also seen a fall in their readership, though the fall is not as heavy as the daily newspapers. They have lost 14.1 % of readers over the period 2010–2014.
- 81 % of the Danish population (people aged 16–89) use the internet every day. This figure includes 95 % of people aged 16 to 24 years old, and 31 % of people aged 75 to 89 years old.
- The share of the Danish population that uses a smartphone for internet access has increased from 51 % in 2013 to 74 % in 2014.
- During the period 2010–2014, a gradual equalisation has taken place in the difference in the share of men and women who use the internet via a mobile phone.
- In 2012, 60 % of mobile users used their mobile device to access the internet. In 2014, this figure has increased to 70 %. For seniors who were older than 75 years old, there was an increase, from 14 % in 2012 to 31 % in 2014.

* The latest accessible figures from Statistics Denmark are from 2012 and were published in March 2015. The 2012 figures were collected in the years 2011 and 2012 and 2013, and have been re-calculated by Statistics Denmark for the middle year, i.e. 2012.

3. Overview – daily media consumption of people aged 16 to 89 years old in 2014

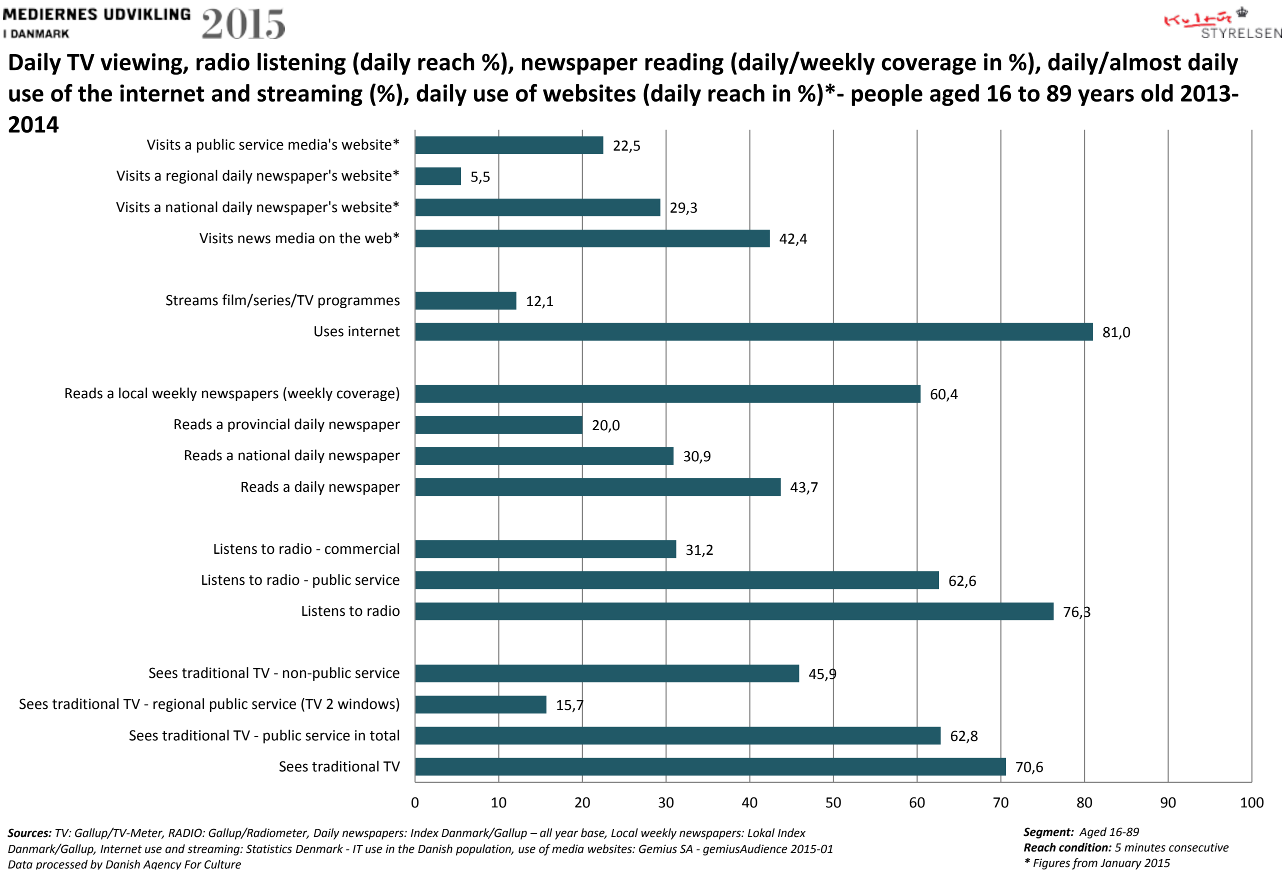
In this section, we will attempt to provide an overview of how big a share of the population (in this section understood as people aged 16 to 89 years old), use different media during the day. First, read the notes to the figures in this section, which are found in section 10.1 below. They explain the methodological basis for the figures, which come from a number of different sources.

The internet was the platform that the most Danes used in 2014 – 81 % used it every day or nearly every day. This is more or less the same share that used the internet every day or nearly every day in 2013 (80 %). The level is generally high, which obviously means that any increase will not be as high as it has been earlier. However, "the internet" is a more general term, which does not describe the specific web-based use of media. The internet is a distribution channel, which gives access to content, but it is not in itself media in the traditional sense. Internet use can cover a wide range of activities, of which the use of media is one.

For example, 42.4 % of the population visited news media on the internet every day (see section 10.1 below for the definition of this media group), 29.3 % visited a national daily newspaper's website every day, and 22.5 % visited a public service media website.

12.1 % of the Danish population streamed film, series or TV programmes every day or almost every day. Naturally, there are age-related differences in the use of media – some of which is quite distinct. We can see this in the sub-analyses, which are available on the report's website and to a certain degree later in the summary.

Figure 1: Daily TV viewing, radio listening (daily reach %), newspaper reading (daily coverage in %), daily/almost daily use of the internet and streaming (%), daily use of websites (daily reach in %) – people aged 16 to 89 years old in 2014.



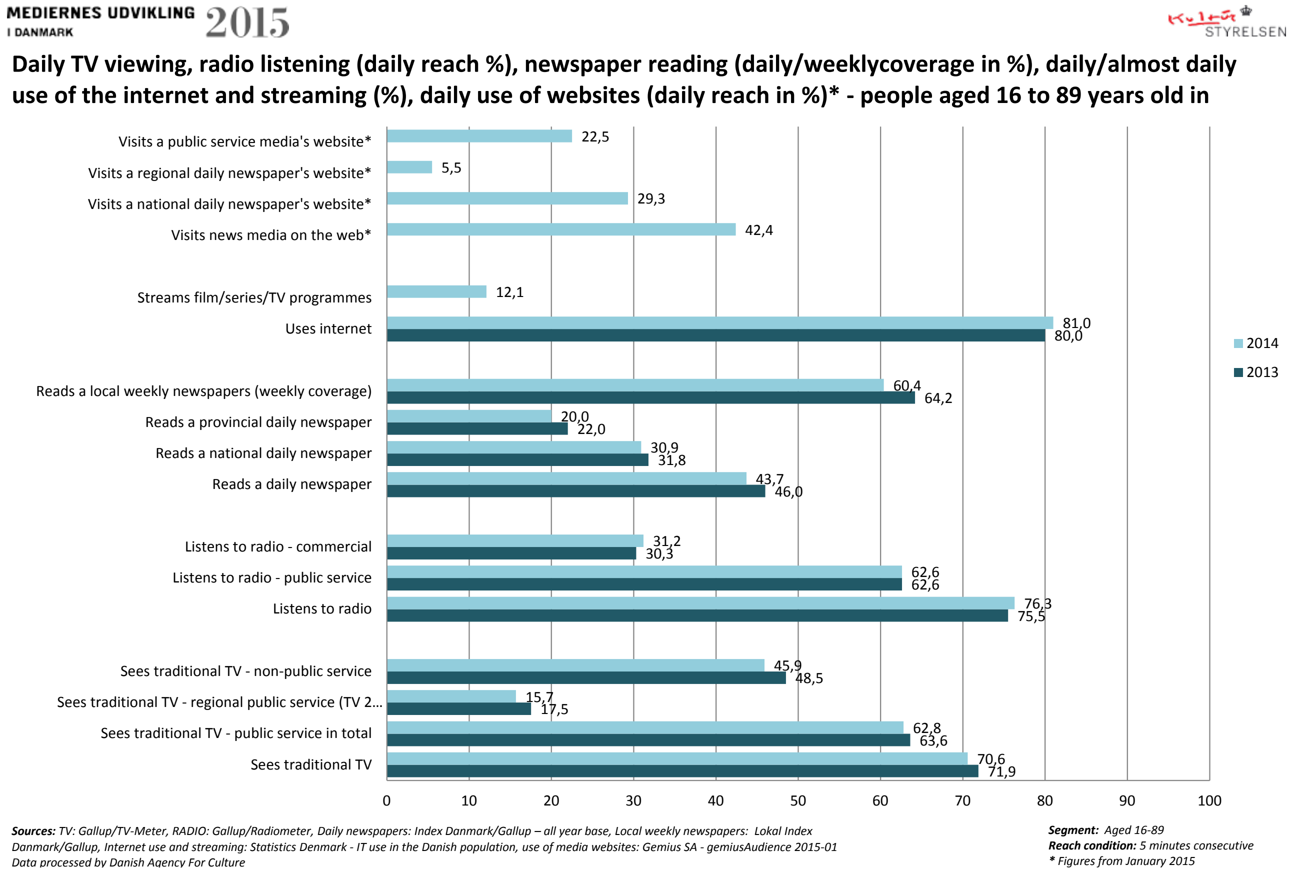
The next most-used media in 2014 was radio, which by virtue of its progress though commercial radio, has seen its share of daily listeners increase from 75.5 % in 2013 to 76.3 % in 2014.

The traditional TV viewing was the third-most widespread daily media activity in 2014. In this case, there was a small fall, from 71.9 % of the population in 2013 who watched five consecutive minutes of traditional television every day, to 70.6 % who watched every day in 2014. However, while there is a fall in traditional TV viewing, there is still a relatively large share of the population who watch traditional television – and also for a relatively long time every day.

43.7 % of the population read a printed newspaper every day (a fall from 46 % in 2013).

The complete overview for 2014 is shown above in Figure 1, while the development from 2013–2014 for media is shown below in Figure 2, which also has figures from 2013.

*Figure 2: Daily TV viewing, radio listening (daily reach %), daily newspapers (daily coverage in %), local weekly newspapers (weekly coverage in %) daily/almost daily use of the internet and streaming (%), daily use of websites (daily reach in %) * – people aged 16 to 89 years old in 2013 and 2014.*



4. Keeping up costs money: Household media-related consumption expenditure is going up and up.

4.1 Household media-related consumption expenditure – all households

In Summary 2014, it was made clear that the media is an essential part of our society and democracy. The media is a link between society's different institutions, and between the citizens and society. It is through all of the forms of the media that people can hear, learn, familiarise themselves with, stay up to date and remain informed about their surrounding society and the international world – and not least, via the media, citizens, politicians, pundits etc., have the opportunity to make their opinions and positions known, have their voices heard, and are able to participate in the society. The media is an important source of knowledge and learning, and a resource that helps to set the framework of people's lives in Denmark, and it is a significant platform for the dialogue that develops and drives society.

Technological development has had a major influence on the media, media development and media consumption in general – and its impact on the household budget has not gone unnoticed. It costs Danish homes to keep up.

In 1994, consumption expenditure spent on various media-related consumption items accounted for 5.5 % of Danish household total consumption expenditure. In 2012, this had increased to 11.3 %. Even in times of financial crisis, the consumption expenditure spent on media-related items has increased relatively strongly. From 1994, the consumption expenditure spent on media-related items was DKK 13,122 a year, which increased to DKK 31,654 a year in 2012 (fixed prices).

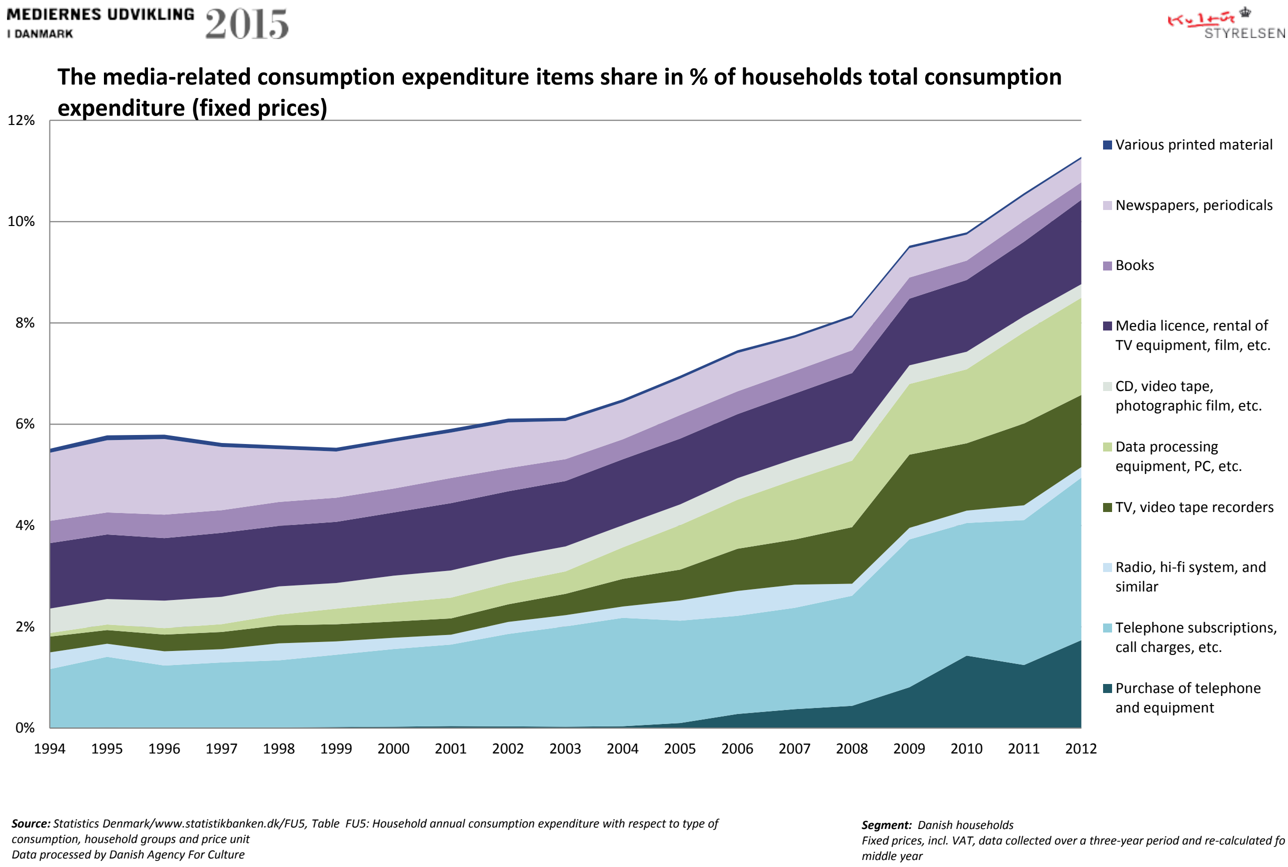
In comparison, in overall terms 16.6 % of consumption expenditure (equivalent to DKK 39,541) in 1994 came from the items "mortgage payments/estimated mortgage payments of owner-occupied homes". In 2012, this share had increased to 17.2 %. (DKK 48,225). In other words, there has been a very small increase in rent and estimated mortgage payments as a *share* of household total consumption expenditure, compared to the increase in media-related items' *share* of household total consumption expenditure.

Media-related items, whose development from 1994 to 2012 is especially noteworthy, are:

1) "**Purchase of telephone and equipment**", which was 0.01 % of household consumption expenditure in 1994 (DKK 32.6), which was an almost unmeasurable figure, had increased to 1.74 % (DKK 4,877.1) in 2012.
2) "**Telephone subscriptions, call charges, etc.**" increased from a share of 1.15 % to 3.21 % during this period of time.
3) "**TV, video recorders**", increased from 0.31 % (DKK 740.4) to 1.42 % (DKK 3,996.8) and
4) "**Data processing equipment, PC, etc.**", increased from 0.07 % (DKK 168.8) to 1.92 % (DKK 5,384.8).

Note that the figures below coverage household consumption expenditure were collected over a three-year period and re-calculated for the middle year. The latest accessible figures from Statistics Denmark are from 2012 and were published in March 2015. For example, the 2012 figures were collected in the years 2011 and 2012 and 2013, and have been re-calculated by Statistics Denmark for the middle year, i.e. 2012.

Figure 3: Consumption expenditure spent on media-related items share in % of household total consumption expenditure (fixed prices).



4.2 Household media-related consumption expenditure with respect to household income

Looking at different household incomes and the impact of rising media-related costs on household budgets, there is a quite large difference to the degree to which the lowest and highest household incomes are stressed by consumption expenditure spent on media-related items.

Households with a household income of less than DKK 150,000 spend less money (fixed prices) on media-related costs than homes with higher household incomes do. However, in 2012 the media-related costs for households with the lowest household income make up a much larger share (over 18 %) of household total consumption expenditure compared to those with higher household incomes.

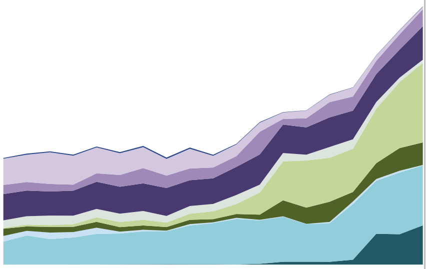
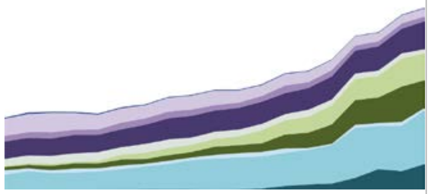
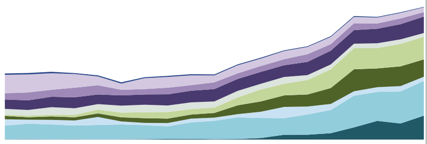
In comparison, the same costs only make up over 9 % of the total consumption expenditure of households with the highest incomes (DKK 800,000 and above). However since 2010, households with a household income of less than DKK 150,000, have spent more money on the consumption of media-related items (DKK 25,047 in 2012) than households with incomes of DKK 150,000–299,999, which in 2012 spent DKK 20,497 (Figure 4 and Figure 5 below).

To put things into perspective, we can compare the media-related items' share of household consumption expenditure with the share of "rent and estimated mortgage payments of owner-occupied homes" share of the total consumption expenditure for the different income groups. For the population in general in 1994, rent was 16.5 % of household consumption expenditure. This share rose to 17.2 % in 2012, i.e. a fairly modest increase.

For the lowest income group with household incomes of less than DKK 150,000, rent as a share of total consumption expenditure fell from 25 % in 1994 to just under 21 % in 2012. Rents' share in 2012 is thus only 2.6 percentage points greater than the media-related items' share of consumption expenditure.

For household incomes between DKK 300,000–499,999, rent as a share of consumption expenditure increased from 15 % in 1994 to over 18 % in 2012 (5.3 percentage points more than the media items in 2012), and for the highest household incomes of DKK 800,000 or greater, it rose from almost 11 % to 15 % (again 5.3 percentage points more than media items in 2012).

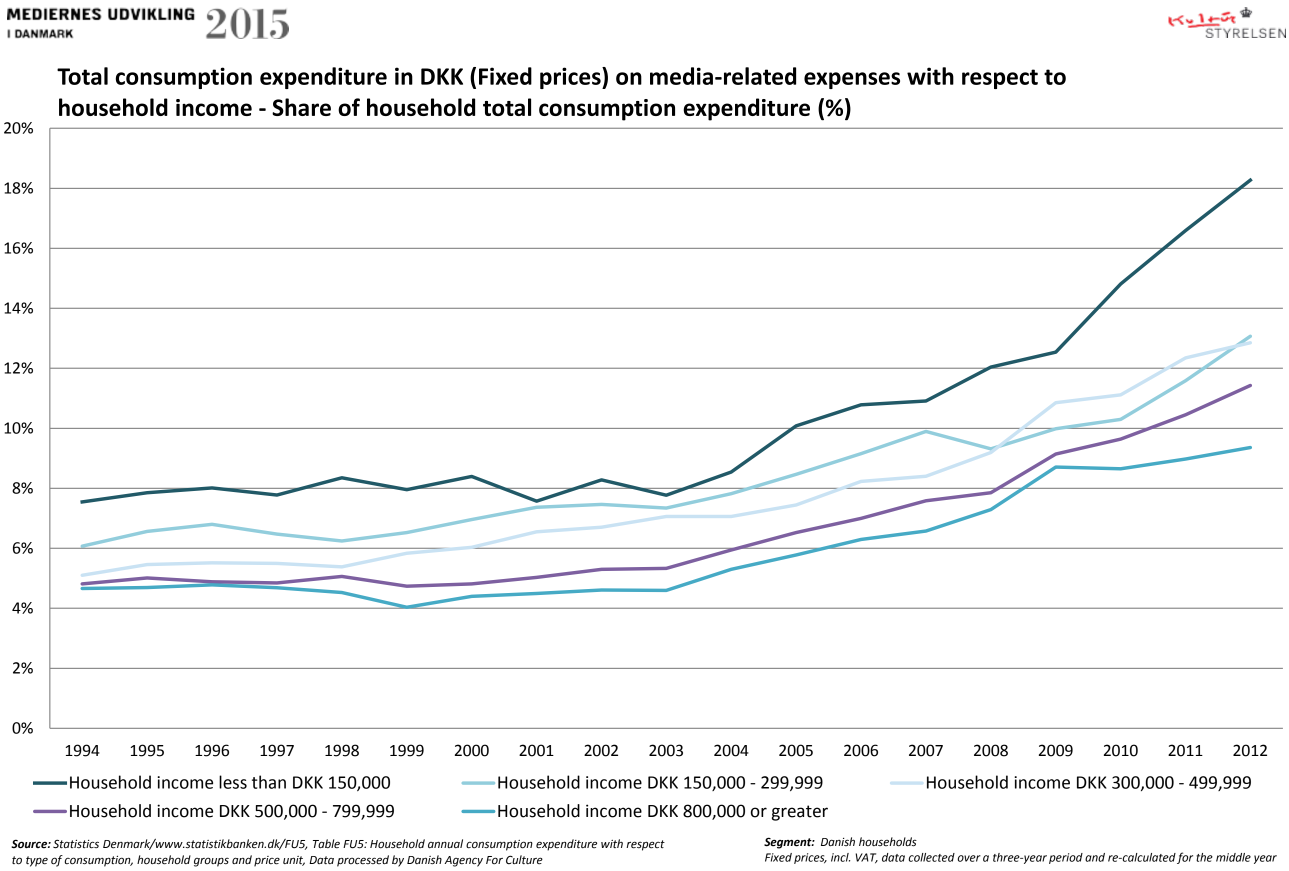
Figure 4: Media-related consumption items' share in % of household total consumption expenditure (fixed prices) and consumption expenditure in DKK for the same items – with respect to household income.

Household income less than DKK 150,000:	**Household income DKK 300,000 - 499,999:**	**Household income of DKK 800,000 or greater:**
The media-related items' share of total household consumption expenditure:	The media-related items' share of total household consumption expenditure:	The media-related items' share of total household consumption expenditure:
1994: 7.5 % **2012**: 18.3 %	**1994**: 5.1 % **2012**: 12.9 %	**1994**: 4.7 % **2012**: 9.4 %
Consumption expenditure in DKK (fixed prices) spent on media-related items per year:	Consumption expenditure in DKK (fixed prices) spent on media-related items per year:	Consumption expenditure in DKK (fixed prices) spent on media-related items per year:
1994: DKK 9,432 **2012:** DKK 25,047	**1994:** DKK 14,083 **2012:** DKK 29,879	**1994:** DKK 22,028 **2012:** DKK 43,048
Change 1994–2012: DKK +15,615 / +165.6 %	**Change 1994–2012:** DKK +15,796 / +112.2 %	**Change 1994–2012:** DKK +21,020 / +95.4 %
		
In comparison:	**In comparison:**	**In comparison:**
Rent and estimated mortgage payments' share of household total consumption expenditure:	Rent and estimated mortgage payments' share of household total consumption expenditure:	Rent and estimated mortgage payments' share of household total consumption expenditure:
1994: 25.0 % **2012**: 20.9 %	**1994**: 15.0 % **2012**: 18.2 %	**1994**: 10.7 % **2012**: 14.7 %
Consumption expenditure in DKK (fixed prices) spent on rent and estimated mortgage payments per year:	Consumption expenditure in DKK (fixed prices) spent on rent and estimated mortgage payments per year:	Consumption expenditure in DKK (fixed prices) spent on rent and estimated mortgage payments per year:
1994: DKK 31,290 **2012:** DKK 28,670	**1994:** DKK 41,327 **2012:** DKK 42,297	**1994:** DKK 50,553 **2012:** DKK 67,706
Change 1994–2012: DKK -2,620 / -8.4 %	**Change 1994–2012:** DKK +970 / +2.3 %	**Change 1994–2012:** DKK +17,153 / +33.9 %

Source: *Statistics Denmark/www.statistikbanken.dk/FU5, Table FU5: Household annual consumption expenditure with respect to type of consumption, household groups and price unit.*
Data was collected over a three-year period and has been calculate for the middle year. For example, 1993:1995 figures for year 1994. Consumption includes VAT etc.
Data processed by the Danish Agency For Culture.

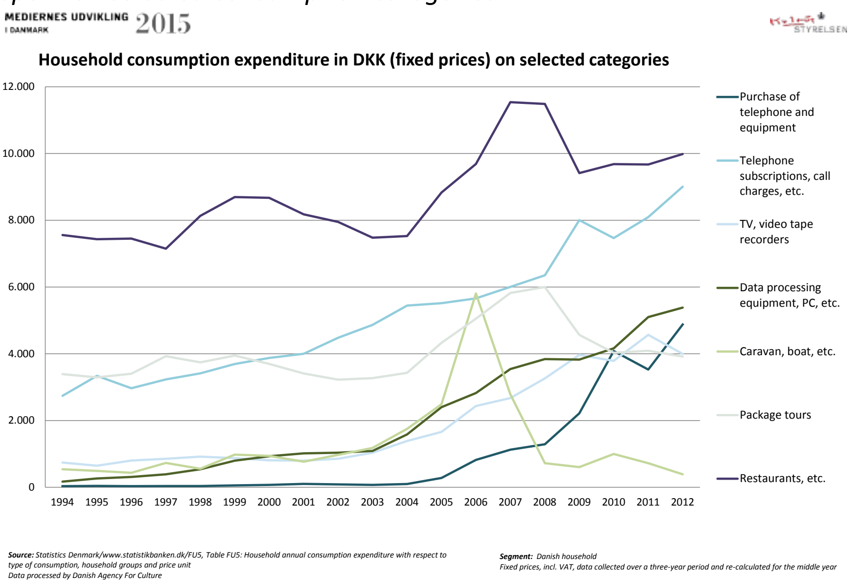
Keep in mind with the above figures that it is relevant going forward to follow the development of the media-related costs. We may consider whether there may be groups in society – and if so which – that in the long term cannot keep up with the development, if the media-related costs continue to increase in the same way as we have seen increase up until now.

Figure 5: The media-related consumption items' share in % of household total consumption expenditure (fixed prices) – with respect to household income.



4.3 Which items are cut down on? Households cut down on external activities during times of crises.

Figure 6: Household consumption expenditure in DKK (fixed prices) spent on selected consumption categories.



As the figures above show, even during the crisis years, consumption expenditure spent on media-related items has increased quite strongly, which can also been seen in Figure 6, where selected consumption expenditure categories are shown (and only the media items where there is the greatest increase). It seem clear that, among other things some activities outside the home have been cut down on during the years of recession: Visits to restaurants, package holidays and caravans, boats, etc., have seen a fairly strong fall in activity during the same period, whereas media-related expenses have increased.

4.4 Household consumption expenditure spent on the media licence and newspapers: Newspapers under pressure in the household budget.

If the media licence is taken out of the category "Media licence, rental of TV equipment, film, etc.", it can be seen that in fixed prices, i.e. without inflation, that during the entire period of 1994–2012, the amount that households spend on the media licence has increased by DKK 222 a year, i.e. an increase of approx. 12.5 % over 18 years. During the same period, household total consumption expenditure has increased by approx. 18%. The media licence has, when measured in fixed prices, been relatively stable and has increased less than the household total consumption expenditure.

In ongoing prices, there has been an increase of DKK 927 in the media licence from 1994–2012, which is equivalent to an increase of approx. 67 %, while the total household consumption expenditure in ongoing prices has increased by over 68 % during the same period. The increase in consumption expenditure spent on the media licence in ongoing prices has followed the increase in total household consumption expenditure.

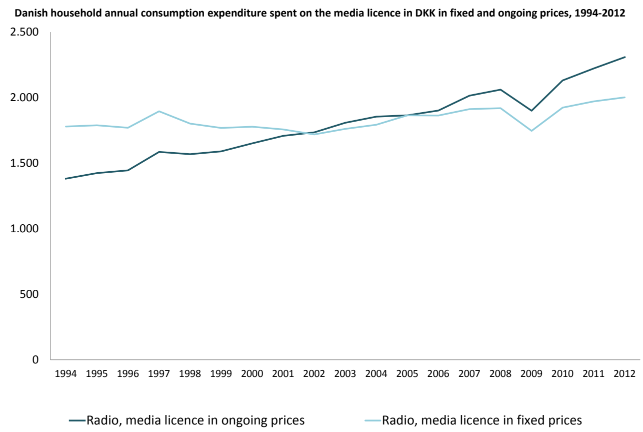
In the same way as with the media licence, the consumption expenditure spent on newspapers in subscriptions and single-purchases has been separated from the overall category "Newspapers, magazines" in the period 1994–2012.

Calculated in fixed prices, consumption expenditure spent on newspaper subscriptions from 1994-2012, has *fallen* by DKK 394 a year – a fall of over 37 %, and *increased* by DKK 287 in ongoing prices, equivalent to an increase of over 45 %. Single purchases of newspapers have been hit hard in particular. In fixed prices, the single purchases have fallen by DKK 697 or almost 87 % from 1994 to 2012, while in ongoing prices, the fall is DKK 333 or almost 69 %.

Figure 7: Danish household annual consumption expenditure in DKK in fixed and ongoing prices on the media licence and newspapers 1994–2012.

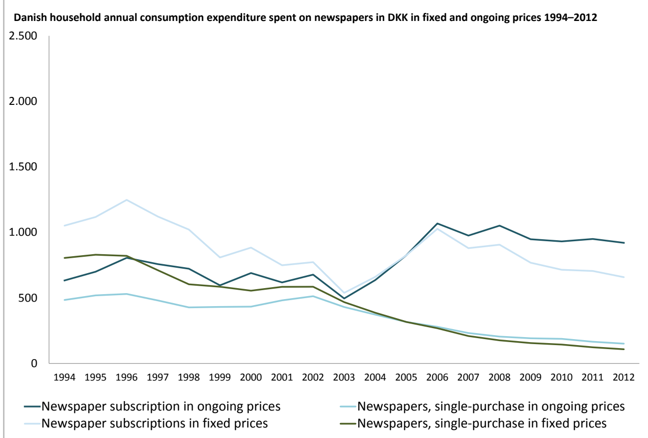
MEDIA LICENCE:

	Fixed prices:	**Ongoing prices:**
1994:	DKK 1,780	DKK 1,382
2012:	DKK 2,002	DKK 2,309
Change 1994–2012:	DKK +222 / +12.5 %	DKK +927 / +67.1 %



NEWSPAPERS– SUBSCRIPTION AND SINGLE COPY PURCHASES:

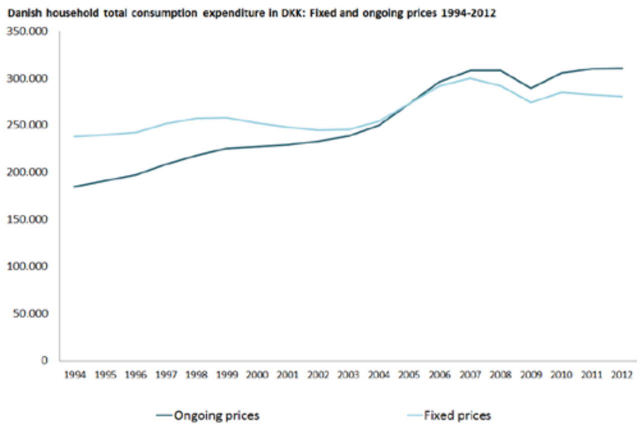
	Fixed prices:	**Ongoing prices:**
Subscription:		
1994:	DKK 1,052	DKK 633
2012:	DKK 658	DKK 920
Change 1994–2012:	DKK -394 / -37.5 %	DKK 287 / 45.3 %
Single copy purchases:		
1994:	DKK 805	DKK 484
2012:	DKK 108	DKK 151
Change 1994–2012:	DKK -697 / -86.6 %	DKK -333 / -68.8 %



In comparison:

Household total consumption expenditure:

	Fixed prices:	**Ongoing prices:**
1994:	DKK 237,891	DKK 184,926
2012:	DKK 280,659	DKK 310,768
Change 1994–2012:	DKK 42,768 / +18 %	DKK 125,842 / +68 %



Source: *Figures provide by Statistics Denmark/www.statistikbanken.dk/FU5, Table FU5: Household annual consumption expenditure with respect to type of consumption, household groups and price unit,* ***Segment:*** *Danish households, ongoing and fixed prices, incl. VAT, data collected over three years and re-calculated for the middle year.*
Data processed by the Danish Agency For Culture.

Comparing the development in consumption expenditure spent on the media licence and newspapers, with the development in household total consumption expenditure in fixed and ongoing prices, clearly shows that the licence fee more or less follows the same development as the total consumption expenditure, while the development for both newspaper subscriptions and especially single purchases of newspapers is quite different than the general consumption expenditure development.

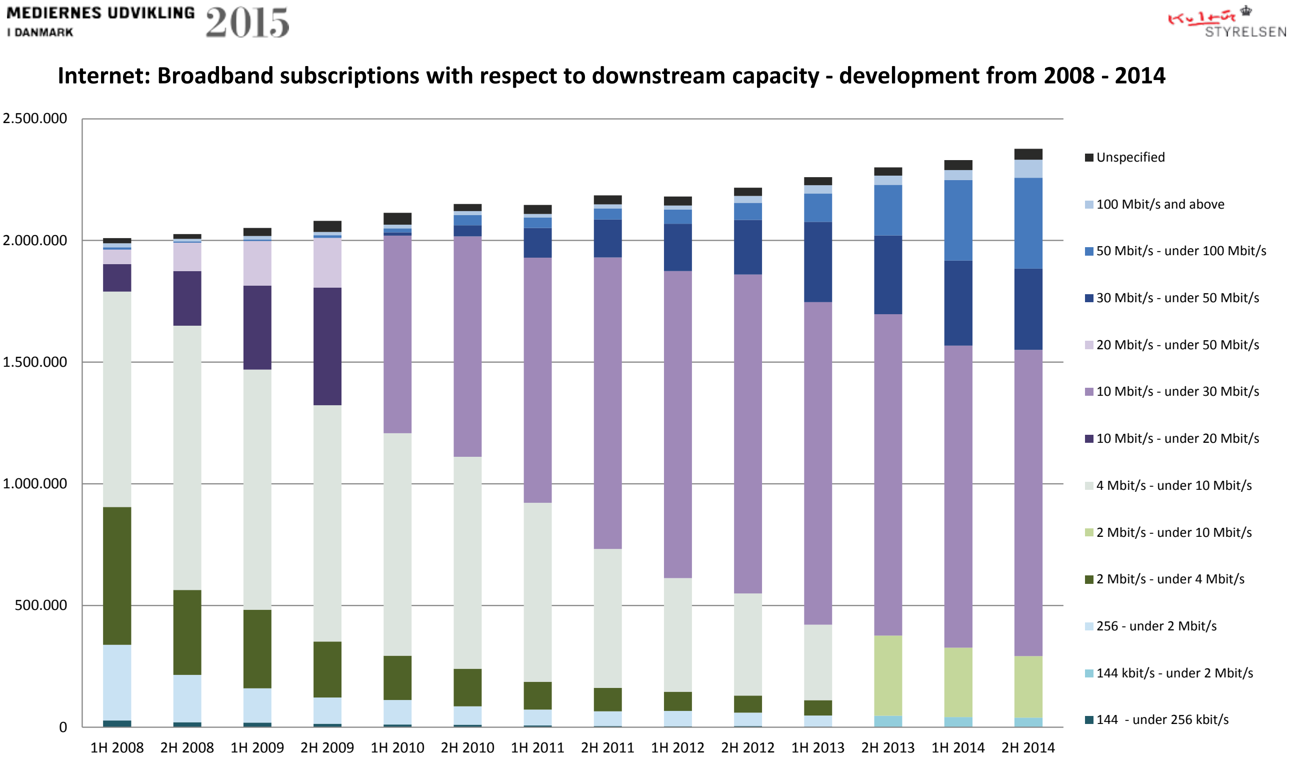
In general, the figure for media licence payers followed the development in the total number of households. However, in 2009 it became possible for Danes to pay the licence fee on a monthly basis, which caused 50,000 people to register to pay the licence fee. In recent years, the number of single-person households has also increased, and the number of pensioners who can have their licence fee reduced has fallen (*Source: DR Licence).* This factor may help to explain why from 2008, the increasing trend for the media licence in fixed and ongoing prices. This increase is slightly larger than the development in the total consumption expenditure.

5. Internet speeds and mobile data consumption – moving fast!

A completely crucial precondition for the development in media consumption using the Internet's many options is that consumers have the necessary technical capacity to be able to use the resource-intensive internet services – also when they are on the move.

As figure 8 shows, apart from individual exceptions, from the first six months of 2008 to the second six months of 2014, there was an almost constant increase in the number of broadband subscriptions, from a total of 2,009,526 subscribers in the first six months of 2008 to 2,376,838 in the second six months of 2014 – an increase of 367,312 or 18.3 % in seven years. The figure also shows that the total number of broadband subscriptions with greater and greater downstream capacity – all the way up to 100 Mbit/s and greater – is increasing rapidly.

Figure 8: Internet: Broadband subscriptions with respect to downstream capacity – development from 2008–2014.



***Source:** Danish Commerce and Companies Agency - Tele statistics - second six months of 2014*
Data processed by Danish Agency For Culture

Mobile broadband data traffic may be an indicator of the extent to which media consumption has become mobile. And it is happening fast. Figure 9 and Figure 10 below, show that currently there is an almost exponential development in data traffic on mobile broadband. The increases in data traffic, with a few single exceptions, have become greater and greater, from one six-month period to the next. The development from the first six months of 2014 to the second six months of 2014 was especially strong, with an increase of over 39 % in mobile broadband traffic.

Figure 9: Data traffic by mobile broadband type (in 1000 MB), first six months 2008 to second six months 2014.

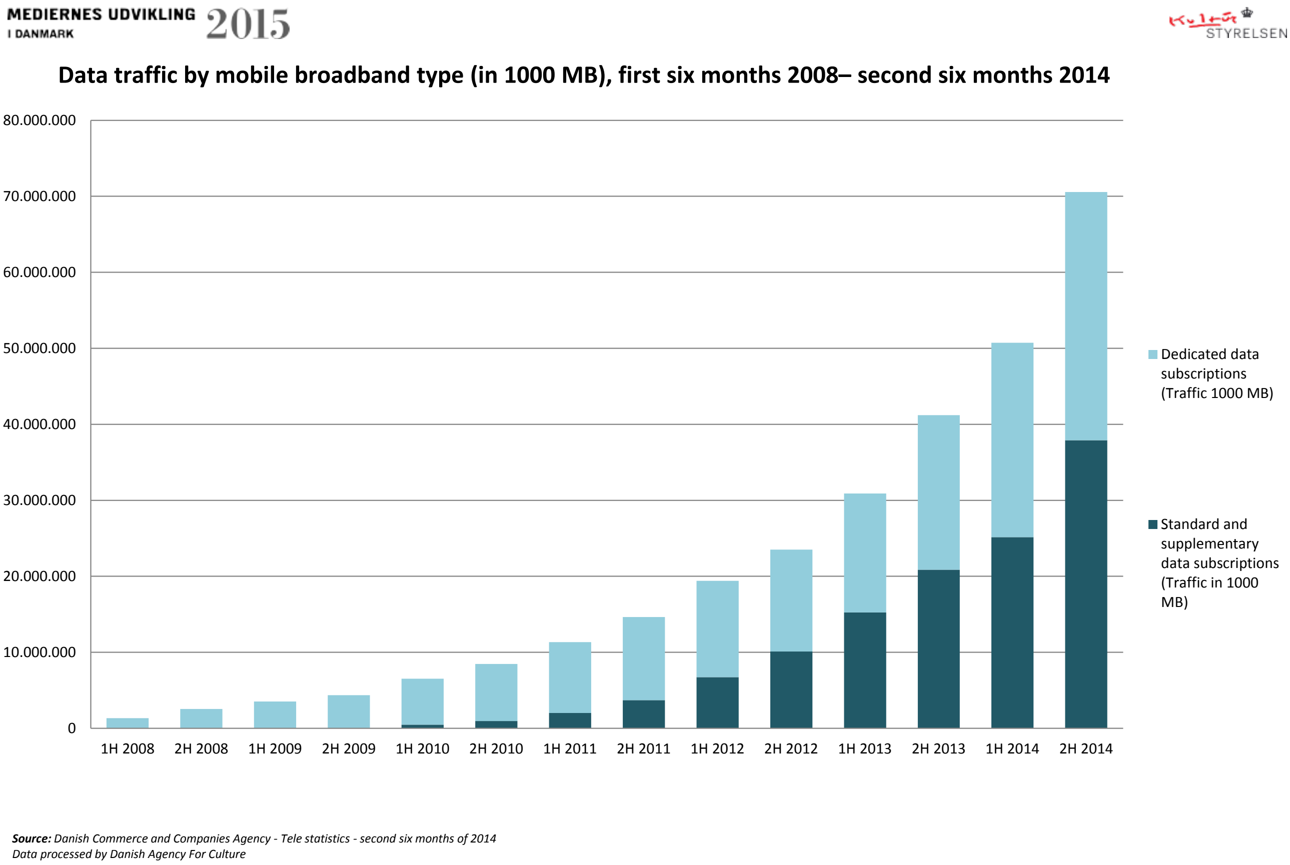
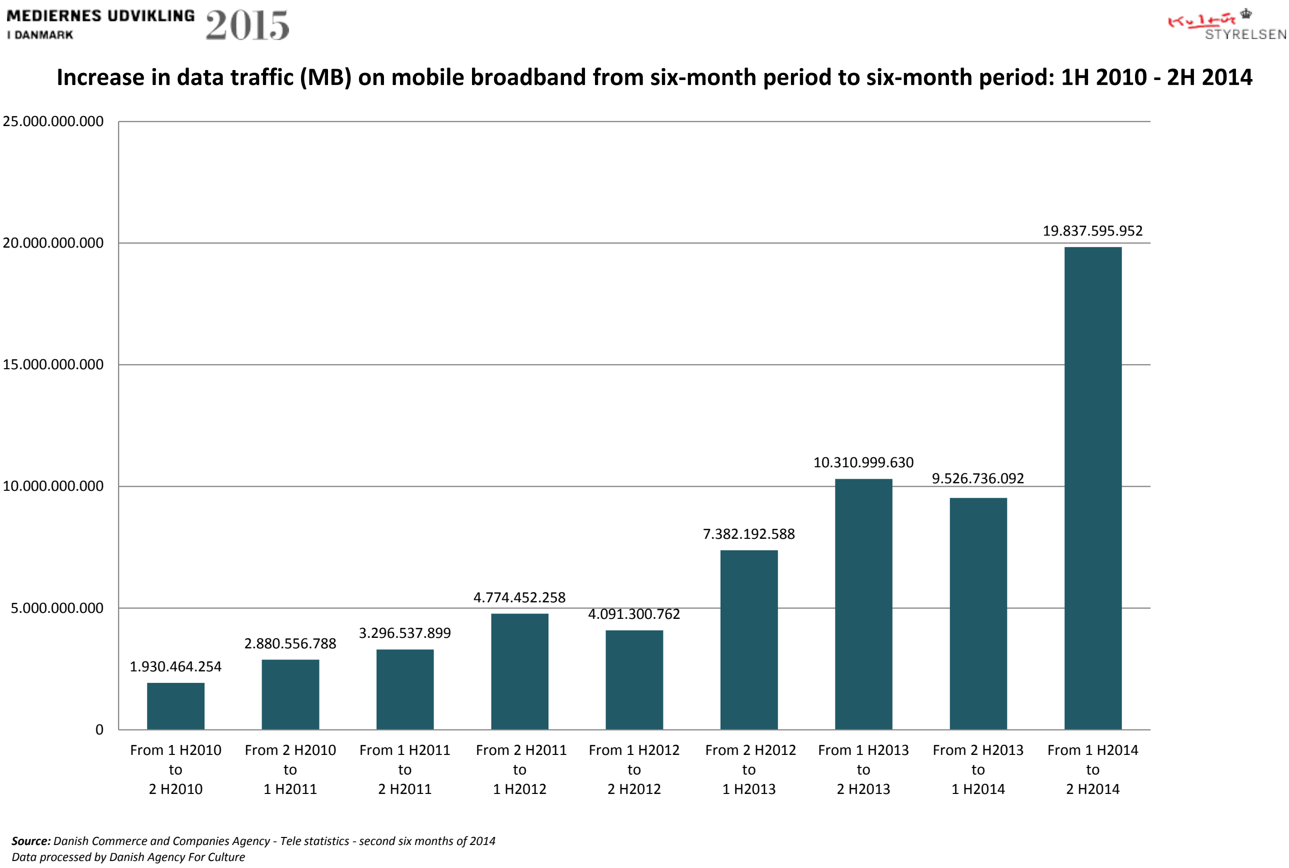


Figure 10: Increase in data traffic (MB) on mobile broadband from six-month period to six-month period: First six months 2010 to second six months 2014



A crucial parameter in relation to media development is whether the continually faster internet speeds are actually accessible and thus possible to purchase by everyone.

Table 1 below shows the coverage of homes and companies with high-speed broadband (100 Mbit/s download and 30 Mbit/s upload) across the whole of Denmark and the five regions. In general, 83 % of all homes and companies in Denmark have access (i.e. technical capability) to at least 100 Mbit/s download and 30 Mbit/s upload. Region of Southern Denmark has the highest coverage with 87 % of all homes and companies in relation to 100 Mbit/s download and 74 % in relation to 30 Mbit/s upload. Region Zealand (71 % and 50 %, respectively) and Region North Jutland (77 % and 67 %, respectively) have the lowest coverage. 95 % of all homes and companies have fixed network broadband access of at least 10 Mbit/s download and 1 Mbit/s upload.

Table 1: Coverage with high-speed broadband (fixed network) in regions for homes and companies

	Denmark Total	North Denmark Region	Central Denmark Region	Region of Southern Denmark	Region Zealand	Capital Region of Denmark
100 Mbit/s download	**83 %**	77 %	84 %	87 %	71 %	85 %
30 Mbit/s upload	**64 %**	67 %	71 %	74 %	50 %	56 %

Source: *Danish Commerce and Companies Agency, Broadband Coverage in Denmark in 2014, Table 8 page 16. The table contains figures for the technically feasible speeds. The figures do not cover mobile broadband.*

6. Development in media consumption – platforms and types of media

As shown earlier, household costs for media-related consumption items have increased strongly in general. This is particularly the case with purchases of telephones, telephone subscriptions, call charges, TV, data processing equipment, PC, etc. In addition, we can see that the speeds of broadband subscriptions, not least with mobile data traffic, are increasing almost exponentially. On the other hand, household consumption expenditure spent on newspapers, both in subscriptions and in particular in single purchases, is falling.

All of this indicates that the media and media consumption is undergoing a structural change during these years. There is 24-hour access to and demand for media content on all types of conceivable platforms – where you want to, when you want to and to the degree you want to. If people want to contribute to debate and supply, there are many diverse options.

In last year's report, we asked if we were witnessing evolution or revolution, and concluded that if we look at some concrete figures, for example accepted media industry figures and figures from Statistics Denmark, we can see that of course there is development and change in the use of media but that the speed of change is not the same in all areas. We also concluded that the speed of development is very different in some areas, especially among age groups, and also in terms of gender, different educational groups and geographical location.

The development in relation to traditional broadcast media (radio and TV) clearly looks to continue to move relatively slowly, however with falling consumption. But there are large differences in the development, especially in consumption by different age-related groups. It is not yet known whether the very strong increase in mobile data traffic and broadband speeds within a short period of time is synonymous with a total restructuring of media habits, where some types of media completely disappear or are strongly decimated, while others take over, or whether the result of the current development is that total media consumption increases.

Below, we will highlight the main conclusions from this year's report concerning individual media and platforms. For a more detailed analysis, refer to the sub-sections for these media.

6.1 TV (national, regional, local)

The average daily viewing figures for traditional television fell from 180 minutes in 2013 to 173 minutes in 2014. While this is a relatively modest fall, it is however, a continuation of the falling trend since the peak of daily viewing of 201 minutes in 2010. In other words, in 2014, we watched almost 30 minutes less traditional television on a daily basis than we did in 2010.

There is a large difference in the development in different age groups, which can be seen in Table 2 below. For young people aged 12-18, daily traditional TV viewing has fallen by 46 minutes in just two years, while for people aged 55-70, it has fallen by only four minutes, and for seniors aged 71 years old or older, it has fallen by seven minutes. With the exception of children aged 3-11, there is a clear correlation between traditional TV viewing and age: The older the person, the more television he or she watches.

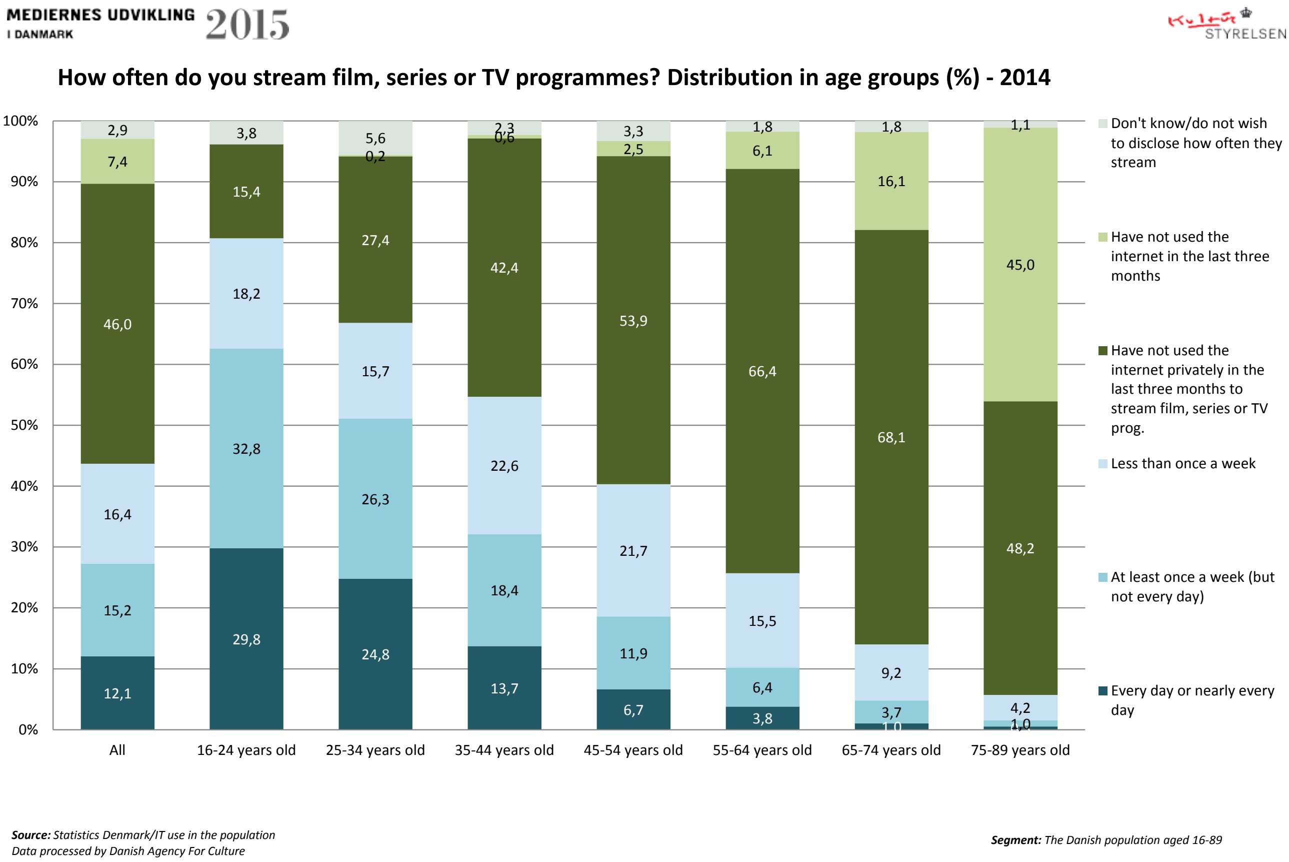
Table 2: Traditional TV viewing: Average time spent in minutes on daily TV viewing 2012-2014 and age

	2012	2013	2014	2013-2014	2012-2014
All	195	180	173	**-7**	**-22**
Aged 3–11	108	98	88	**-10**	**-20**
Aged 12-18	123	98	77	**-21**	**-46**
Aged 19-34	183	157	157	**0**	**-26**
Aged 35-54	202	182	170	**-12**	**-32**
Aged 55-70	240	240	236	**-4**	**-4**
Aged 71 or older	275	265	268	**3**	**-7**

Source: *TNS Gallup/TV-Meter, Data processed by Danish Agency For Culture*

In the accepted media industry figures of TV viewing there are no figures as yet for the extent of viewing on platforms other than traditional TV, but Statistics Denmark survey of IT use in the population has given us knowledge of approx. how often the population streamed film and series and TV programmes in 2014. It shows here – perhaps unsurprisingly, a completely reversed age distribution compared with traditional TV viewing: It is often the youngest who stream. The figures are estimated on the basis of people being asked about their use of the internet in the last three months, and on how often the person streams. In other words, it does not say anything about how long they spend streaming, but how often they stream. We know that traditional TV viewing is declining, but we do not actually know if the overall viewing of audio-visual content is increasing. Almost 30 % of people aged 16-24 stream every day or nearly every day – but for a large part of the age group, streaming film, series or TV programmes is not a daily occurrence. Looking at the entire population (people aged 16 to 89), over 12 % stream daily.

Figure 11: How often do you stream film, series or TV programmes? Distribution in age groups (%) – 2014



The regional TV 2 stations

In 2014, the regional TV 2 stations had an average daily number of viewers for the main broadcast in the 19:30 window in TV 2's main broadcast of 552,000 viewers. This corresponds to 10.2 % of people who watch TV at that point, or 33.6 % of viewers. In total in 2014, there was on average approx. 608,000 people every day (reach) who watched five consecutive minutes of the 19:30 regional main broadcast. As shown in Table 3 below, this is a fall in relation to 2013, when the average daily viewing figure for the 19:30 main broadcast was approx. 601,000 viewers and the daily reach was 666,000. Since 2010, when there was approx. 839,000 daily viewers, there has been an ongoing fall in viewer figures for the 19:30 broadcast.

Table 3: The regional TV 2 stations in windows in TV 2's programming - key figures 2013-2014

		Over a complete 24-hour period	19:30 broadcast
Rating in 1000 (Average daily number of viewers)	**2013**	482.3	601.1
	2014	452.7	552.1
Rating in % (Share of TV viewers)	**2013**	8.9	11.1
	2014	8.3	10.2
Share % (Share of TV viewing)	**2013**	32.0	34.7
	2014	31.3	33.6
Average daily reach in 1,000 (Accumulated daily coverage)	**2013**	806	666
	2014	725	608
Average daily reach in % (Accumulated daily coverage)	**2013**	16.3	12.3
	2014	13.4	11.2

Source: *TNS Gallup/TV-Meter, Data processed by Danish Agency For Culture*
Segment: *The Danish population in the age group three years old or older*
Reach condition*: Five minutes of uninterrupted viewing (five consecutive minutes).*
The figures solely relate to programmes broadcast in TV 2's programming and not the 24-hour channels.

The regional TV 2 stations' 24-hour channels, which started broadcasting in January 2012, , have a relatively low number of viewers, as shown in Table 4 below, with a slight fall from 2013 to 2014, but however, above the 2012 level.

Table 4: The regional TV 2 stations 24-hour channels- key figures 2012-2014

		Over a complete 24-hour period
Rating in 1000 (Average daily number of viewers)	**2012**	3.9
	2013	5.1
	2014	4.4
Rating in % (Share of TV viewers)	**2012**	0.1
	2013	0.1
	2014	0.1
Share % (Share of TV viewing)	**2012**	0.5
	2013	0.7
	2014	0.7
Average daily reach in 1,000 (Accumulated daily coverage)	**2012**	161
	2013	199
	2014	181
Average daily reach in % (Accumulated daily coverage)	**2012**	3.0
	2013	3.7
	2014	3.3

Source: *TNS Gallup/TV-Meter, Data processed by Danish Agency For Culture*
Segment: *The Danish population in the age group 3 years old or older, Reach condition: Five minutes of uninterrupted viewing (five consecutive minutes).*

Non-commercial local TV in MUX 1

Table 5: Non-commercial local TV in MUX 1 - coverage per quarter in 1,000 and %.

		Calculated in 1000	Calculated in %
Average reach per quarter (Accumulated coverage)	**Q3 2014**	355	6.5
	Q4 2014	419	7.7
	Q1 2015	404	7.4

Source: *TNS Gallup/TV-Meter, Data processed by Danish Agency For Culture*
Segment: *The Danish population in the age group three years old or older*
Reach condition*: Five minutes of uninterrupted viewing (five consecutive minutes).*

Viewing of non-commercial local TV in MUX1 is calculated as reach per quarter. This is a consequence of the new executive order for the area, which came into force in February 2014. There are in total 35 programme licences under the new local TV scheme, distributed among the regional TV 2 station's broadcast areas. During Q1 2015, there were in total approx. 404,000 people who saw five consecutive minutes of non-commercial local TV, which is a fall, from 419,000 people in Q4 2014 but still above the 355,000 in Q3 2014.

Learn more about television consumption in the television section in the report's website.

6.2 Radio (national, commercial, local radio)

The average daily radio listening fell by just one minute from 2013 to 2014: From 117 minutes to 116 minutes daily. Since 2008, daily listening has fallen by 15 minutes (131 minutes in 2008). There is a difference in how the different age groups listening has developed.

The development of the oldest age group of people aged 70 years old or older, is especially strong. From 2013-2014, there was a fall of 10 minutes and since 2008 for this age group, there has been a significant fall in daily listening of no less than 43 minutes. This is significantly greater than the fall of 15 minutes in listening for the general population. The biggest fall in listening time for the oldest age group happened in the period 2010 to 2011 (- 11 minutes), from 2011-2012 (- 7 minutes), and 2013-2014 (- 10 minutes).

There may be a connection with DR's surrender of FM 4 in 2011 and the new channel strategy with the restructuring of P1 and P2, which after the restructuring, had to share a FM band or be heard on DAB. But from being the age group that in 2008 by far listened to the most radio – 34 minutes *more* every day compared to the next-oldest age group, which had the second highest listening time, in 2014 the oldest listening group listens to 10 minutes *less* than the next-oldest age group.

Table 6: Average daily listening in minutes in 2008, 2013 and 2014, and age.

	2008	2013	2014	Change 2008-2014	Change 2013-2014
All	131	117	116	-15	-1
12-18 years old	68	54	57	-11	3
19-34 years old	108	93	90	-18	-3
35-54 years old	134	116	120	-14	4
55-69 years old	153	152	154	1	2
Aged 70 or older	187	154	144	-43	-10

Source: *TNS Gallup/Radio-Meter, Data processed by Danish Agency For Culture*
Segment: *The Danish population in the age group 12 years old or older*

In relation to education, people who had a basic school education or upper secondary education in 2014, listened to 122 minutes daily, which is a fall from 126 minutes in 2013. People who had a higher education in 2014, listened to 107 minutes daily, which is an increase from 104 minutes in 2013. In 2013 there was a difference of 22 minutes between the two educated groups' daily listening, and in 2014 this difference is 15 minutes.

Just as with television use, there is a proportion of listening/usage that is not registered by official media industry figures, e.g. podcasts are not included.

Politicians in Denmark have decided with the supplementary agreement to the media agreement for 2015-2018, that the development in radio listening on different platforms must be accounted for every autumn. When 50 % of radio listening is carried out on digital platforms (cable, NET or DAB), the decision on whether to close the FM band will be taken. However, the closure will take place two years at the earliest after the 50 % digital listening has been achieved. In addition, it has been decided that there will be a gradual transfer to the DAB standard DAB+, which is an improved version of DAB.

Since DR is the only station that consistently adds an audio code for monitoring its broadcasts for platforms, Table 7 shows an analysis of the total listening distributed across platforms, including unknown platforms, and listening to DR's channels across platforms. The platform distribution of the total listening is thus not completely accurate, and the digital listening *may* be larger than that shown in Table 7. It is not less than what is shown in the table.

Table 7: The total radio listening and DR listening by platform (%) – 2009, 2013 and 2014

	2009		2013		2014	
	All listening	DR listening	All listening	DR listening	All listening	DR listening
Unknown platform	21.0	0.0	15.1	0.0	14.9	0.0
FM	72.0	90.7	63.9	75.5	61.8	72.4
DAB	5.4	7.0	11.4	12.4	12.1	13.4
INTERNET	1.7	2.2	4.1	4.7	6.2	7.4
Cable	-	-	5.6	7.4	4.9	6.7

Source: *TNS Gallup/Radio-Meter, Data processed by Danish Agency For Culture*
Segment: *The Danish population in the age group 12 years old or older*

As is shown in Table 7 above, there is an ongoing fall in FM listening and an increase in digital listening, and NET listening especially has progressed from 2013 to 2014.

Commercial local radio

In relation to local radio, only local commercial radio is measured in the accepted media industry figures in Gallup/Local Radio Index. In effect, there are no figures for non-commercial local radio.

As Table 8 below shows, commercial local radio is strongest in the Region of Southern Denmark, Central Denmark Region and North Denmark Region, while they are more or less not listened to in the Capital Region of Denmark, and only to a limited degree in Region Zealand. The commercial stations Pop FM (FM 6) and NOVA FM (FM 5), which are almost national, are strong in Capital Region of Denmark and Region Zealand, which may be the reason for why listening is so low in these two regions.

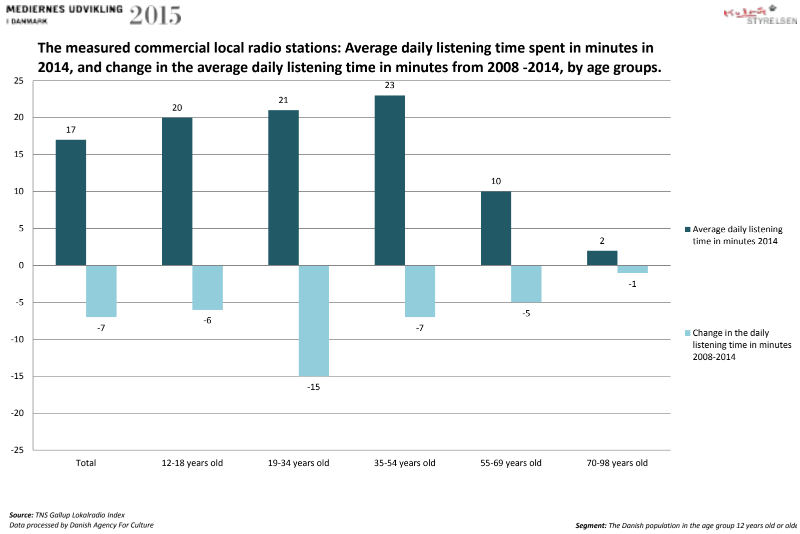
Table 8: The measured commercial local radio station's daily listening time - in minutes - Total and with respect to geography

	Total	Capital Region of Denmark	Region Zealand	Region of Southern Denmark	Central Denmark Region	North Denmark Region
2008	24	1	16	36	42	42
2013	21	1	9	35	34	38
2014	17	0	10	30	27	27
2008-2014	-7	-1	-6	-6	-15	-15
2013-2014	-4	-1	1	-5	-7	-11

Source: *TNS Gallup/Local Radio Index, Data processed by Danish Agency For Culture*
Segment: *The Danish population in the age group 12 years old or older*

The three youngest age groups spent almost as much time listening to commercial local radio in 2014 – between 20 and 23 minutes daily. However, as shown in Figure 12, the development in daily listening time since 2008 has been strongest for the people aged 19-34, with the total fall of 15 minutes in the daily listening time, while among people aged 12-18, it was six minutes and seven minutes among people aged 35-54. The two oldest age groups have a significantly lower daily listening time for the commercial local radios which are measured – only two minutes daily for the oldest age group in 2014.

Figure 12: The measured commercial local radio stations: Average time spent in minutes on daily listening in 2014, and change in the average daily listening time in minutes from 2008– 2014, by age groups.



The total daily coverage in % in 2014 was 10.6 % – highest among people aged 12-18 with 18 %, and lowest among the oldest age group with only 1.6 %. Unsurprisingly, it is the same with weekly coverage, which in total was 30.1 % in 2014.

Table 9: The measured commercial local radio's daily and weekly coverage (%) in age groups in 2014

	Total	12-18 years old	19-34 years old	35-54 years old	55-69 years old	70-98 years old
Daily coverage in %	10.6	18.0	13.6	13.3	6.0	1.6
Weekly coverage in %	30.1	50.6	34.8	34.8	21.9	10.4

Source: *TNS Gallup/Local Radio Index, Data processed by Danish Agency For Culture*
Segment: *The Danish population in the age group 12 years old or older*

Learn more about radio listening in the radio section in the report's website.

6.3 Daily newspapers (national, regional) and local weekly newspapers

In 2014, almost 2.1. million Danes read a printed newspaper every day, equivalent to 42.5 % of the population This is a continued fall with respect to the entire period that the data covers: 2010-2014 From 2013–2014, there was a fall of almost 5 % and since 2010, a fall of almost 26 % in daily readership The only printed newspaper group that has seen an increase from 2013-2014, is free newspapers/free commuter newspapers – represented by Metroxpress, which has seen an increase of nearly 29 %.

In general, the national daily newspapers' daily readership has fallen by nearly 3 % over the period 2013-2014, while the provincial newspapers readership has fallen by almost 9 %.

Table 10: Average daily reader readership in 1,000 - Newspaper groups - 2010-2014

	2010	2011	2012	2013	2014	Change in % 2010-2014	Change in % 2013-2014
All daily newspapers	2,763	2,606	2,436	2,159	2,054	-25.7 %	-4.9 %
All national daily newspapers	2,051	1,904	1,772	1,495	1,455	-29.1 %	-2.7 %
All provincial daily newspapers	1,281	1,213	1,125	1,027	937	-26.9 %	-8.8 %

Source: *Index Denmark/Gallup/Based on whole year, Data processed by Danish Agency For Culture*
Segment: *The Danish population in the age group 12 years old or older*

In 2014, just over 2.8 million people or 58 % of the Danish population read a local weekly newspaper. This is a fall from almost 3 million readers in 2013, or a fall of 6 %. Clearly, the fall for local weekly newspapers from 2013 to 2014 is greater than for the daily newspapers, but if we look at the group of national omnibus newspapers/business newspapers (Jyllands-Posten, Politiken, Berlingske, Kristeligt Dagblad, Information and Børsen), that does not include Metroxpress, this group has seen a fall in their daily readership of over 10 % from 2013-2014, while tabloid newspapers (BT and Ekstra Bladet) have seen a fall of 14 %.

In general, over the period 2010-2014, the readership of weekly newspapers has not been as adversely affected as the daily newspapers, which is probably down to, among other things, that they are distributed free.

Table 11: The local weekly newspapers: Average weekly total readership and in coverage areas 2010-2014.

	2010	2011	2012	2013	2014	Change in % 2010-2014	Change in % 2013-2014
Local weekly newspapers – in total	3,273	3,272	3,106	2,993	2,812	-14.1 %	-6.0 %
HT area	991	992	928	904	838	-15.4 %	-7.3 %
East of The Great Belt excl. HT area	421	421	396	402	360	-14.3 %	-10.4 %
Fyn	297	298	281	265	256	-13.8 %	-3.5 %
Jutland	1,618	1,614	1,553	1,484	1,399	-13.5 %	-5.7 %

Source: *Local Index Denmark/Gallup/Based on whole year, Data extraction carried out by TNS Gallup, data processed by the Danish Agency For Culture.*
Segment: *The Danish population in the age group 12 years old or older*

The fall in reader numbers for local weekly newspapers looks to be following the distribution of "Advertising and free newspapers - no thanks" stickers placed on letterboxes.

Table 12: Share in % that have "Advertising and free newspapers - no thanks" on their door/letterbox/mail box, 2010-2014

	2010	2011	2012	2013	2014
Have "Advertising and free newspapers, no thanks" on their door/letterbox	9.6	10.1	12.0	12.9	14.2
Do not have "Advertising and free newspapers, no thanks" on their door/letterbox	87.1	86.4	84.5	84.4	83.1
Unanswered	3.3	3.5	3.5	2.6	2.8

Source: *Index Danmark/Gallup – all year base,* ***Segment:*** *The Danish population in the age group 12 years old or older*
Data processed by the Danish Agency For Culture.

While the national daily newspapers have a larger share of male readers (52.9 % men compared to 47.1 % women), local weekly newspapers have larger share of female readers (53.3 % women compared to 46.7 % men). In relation to age, both the national daily newspapers and local weekly newspapers have an over representation of people in the two oldest age groups (aged 55-70 and aged 71 or older) among their readership compared to the general population. People aged 35-54 are under represented among national daily newspapers' readers, while they are over represented among local weekly newspapers. The two youngest age groups (aged 12-18, and aged 19-34) are under-represented in the readership of both media types, but it applies extensively to local weekly newspapers. In relation to education, 40.5 % of national daily newspapers' readers have completed an education course that lasted at least three years, while this was 33.1 % for local weekly newspapers' readers. In contrast, 38.8 % of local weekly newspapers' readers have completed a vocational education, while this figure is 29.2 % for national daily newspapers' readers.

Printed newspapers, is presumably the "traditional" media type, which has been the most affected by the technological development. However, the published (news) media is certainly not going to disappear – it is changing and has already long ago moved to other platforms – also in the form of pure net-based news media, which does not originate in either the printed media or in radio – or in TV media.

In addition, newspaper groups have devised new products and types of content for their product portfolios and developed new business models in relation to the web-based part of the business. The magazine groups have a large reach on the internet, which will be evident in the section on web traffic below. The media groups have went through a development process in line with the technological development and subsequent media development. In effect, it is the same providers of media content that are operating in the market. It is just that the service is offered on several platforms. It is therefore relevant to assess the use of the magazine groups' total service, so that we can assess their reach in the population.

Learn more about the consumption of printed media in the newspaper/print section in the report's website.

6.4 Web traffic – use of Danish news media on the web and the biggest foreign sites

The figures related to web traffic are solely based on figures from January 2015, since it was possible to include total figures for both desktop, mobile and tablet platforms, where previously the figures were solely based on desktops. Since the available multiplatform figures only start from 2015, there are no historical figures available, which can show something about development trends. In effect, it is a pure "baseline figure".

The new multiplatform figures have on paper, increased news media's net coverage among Danish internet users. This is because the multiplatform measurements in addition to the use of desktops, include the use of mobile and tablet devices, and thus a number of usage situations that were not previously included in the measurement. Major media especially looks to have a significantly larger reach among users than the previous figures indicated.

The major foreign sites, Facebook and Google, have however more users and take a larger share of the users' time measured solely on the desktop platform than some of the Danish internet media in the analysis across the three platforms desktop, mobile and tablet.

Compared to mobile and tablet, the desktop platform has regardless of the age group, the most monthly users. The youngest users are in comparison to the older users, present to a much greater degree on all of the platforms, while the older users prefer the desktop platform.

Table 13: User composition per platform – across age groups. January 2015:

Platform	All	7-18 years	19-34 years	35-54 years	55-70 years	71 years old
Total	100 %	15.5 %	23.2 %	32.1 %	22.2 %	7.0 %
Desktop	100 %	15.8 %	22.9 %	31.9 %	22.2 %	7.2 %
Mobile	100 %	16.8 %	27.8 %	35.7 %	16.9 %	2.9 %
Tablet	100 %	20.4 %	23.0 %	35.7 %	18.0 %	2.9 %

Source: *Gemius - gemiusAudience 2015-01*

The user composition for the individual platforms shows that in general, men and women make up an equal share of the users for desktop, mobile and tablet. In relation to education, users with a higher education constitute a total of 41.7 %, the largest share of users on all platforms. The users with a basic school education as their highest completed level of education, constitute 14 %, the smallest share of users on the different platforms. In relation to geography, users from the Capital Region of Denmark constitute a total of 29.9 % , the largest share of users across the platforms.

The individual media group's characteristics on a number of key parameters are shown in Table 14 below. It is worth noting, that the described media groups are a composite of a number of selected titles. The total number of titles (sites) that are included in the individual media groups are different, which has an impact on the aggregated figures below. The media group "National daily newspapers – All" consists for example of nine different media, while "National public service" consist of two different media. A more detailed description of which titles the individual media groups consist of is shown by the web traffic section.

Table 14: Key figures for overall 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. January 2015:

Media groups	Monthly reach	Users	Page views	Visits	Time consumption per user	Daily reach
Independent internet media	32 %	1,622,152	30,820,247	17,249,856	00:16:00	7 %
Free newspapers	21 %	1,053,230	16,076,672	6,363,624	00:07:12	3 %
National daily newspapers - All	70 %	3,567,703	543,328,618	165,437,773	03:06:48	31 %
National public service*	69 %	3,518,270	259,293,103	82,543,545	01:46:50	24 %
Local (weekly) newspapers	16 %	821,568	6,624,952	2,975,013	00:05:52	2 %
Regional public service	20 %	994,411	11,116,817	5,530,574	00:08:29	3 %
Regional daily newspapers	28 %	1,407,534	58,536,889	14,981,246	00:29:40	6 %

***Source**: Gemius - gemiusAudience 2015-01* **National public service covers dr.dk and tv2.dk*

The media groups with national daily newspapers and the national public service media have each around 3.5 million users per month, which makes them the two biggest media group measured across platforms in January 2015. The two media groups have the longest reach among Danish internet users and both were in contact with approx. 70 % of the Danish population in January 2015.

If instead we look at the average *daily* reach in January 2015, the picture is slightly different in terms of balance of power between the two dominating media groups. The media group with national daily newspapers has an average daily reach of 31 %, while the media group with national public service media, has a lower average daily reach – 24 %.

The media groups with independent internet media and the regional newspapers reach less than a third of the Danish population every month. The media groups with regional public service media and the local (weekly) newspapers reach every fifth or sixth Dane during a month.

When it comes to the total number of page views, visits and time spent, the media group with national daily newspapers is ahead of the other media groups. This media group has 543 million page views a month, which is more than double as many page views as the media group with national public service media. The high number of page views at national daily newspapers is because of among other things, this media group is a composite of a number of different daily newspapers, of which in particular some individual tabloid newspapers to a great extent contribute to the number of page views.

Looking at the gender and age of media groups' users, reveals a number of structural differences in how and to what degree the media groups are used, but also their level of education and geography plays a part.

The media group with national daily newspapers, local (weekly) newspapers and regional newspapers, have a higher coverage among men than women, while both the national and regional public service media has more or less equal coverage among men and women.

The media group with national daily newspapers has the most marked difference in time consumption in relation to gender. Men spend an average approx. 4 hours and 18 minutes a month on the national newspapers, which is more than two and half hours more than women. For this media group, age is also a crucial factor when it comes to time consumption. Younger internet users spend significantly less time every month on national daily newspapers' pages than older internet users. Children and young adults aged 7-18, spend 53 minutes every month, while people aged 55-70, spend more than four hours every month.

The media groups with regional and local media do not have anywhere near as high a coverage (reach) among young users as the major media groups.

The media groups with national daily newspapers and national public service media have a high coverage in all of the age groups, and thus appeal to a broad public. The national public service media has an especially high reach among internet users aged 7-18. "Independent internet media" and "Free newspapers" have a significantly better coverage among younger internet users than among older internet users.

Table 15: Reach for the major media groups - across gender and age. January 2015:

Media groups	All	Men	Women	7-18 years old	19-34 years old	35-54 years old	55-70 years old	71 years old or older
Independent internet media	32 %	31 %	33 %	33 %	41 %	32 %	26 %	18 %
Free newspapers	21 %	19 %	22 %	31 %	33 %	16 %	11 %	5 %
National daily newspapers - All	70 %	74 %	66 %	72 %	74 %	70 %	68 %	66 %
National public service	69 %	69 %	70 %	79 %	73 %	68 %	63 %	62 %
Local (weekly) newspapers	16 %	18 %	14 %	8 %	15 %	19 %	19 %	17 %
Regional public service	20 %	20 %	19 %	12 %	21 %	23 %	20 %	14 %
Regional daily newspapers	28 %	30 %	26 %	17 %	28 %	31 %	30 %	27 %

***Source**: Gemius - gemiusAudience 2015-01*

The target group affinity shows via an index figure, whether for example, the individual age groups are over or under represented as users of the respective media groups in relation to the general internet population. If the affinity figure is over 100 for an age group for a media group, then the age group is over represented in the user group of the media in question. If the affinity figure is less than 100, the group is under represented.

Based on the calculation of the target group's affinity, it is clear that for the media groups with local weekly newspapers, regional daily newspapers and national daily newspapers, there is an over representation of men. Conversely, "Free newspapers" are especially able to attract women. The user composition for the media group with independent internet media, national public service media and regional service media corresponds in general to the user composition of internet users on the whole. In addition, the media group with national daily newspapers have the least variation in affinity across the age groups.

Table 16: Target group affinity for the major media groups across platforms and across age groups. January 2015:

Target group	Internet (Total)	Independent internet media	Free newspapers	National daily newspapers - All	National public service	Local (weekly)	Regional public service	Regional daily
Men	100	98	94	106	99	111	101	108
Women	100	102	106	94	101	89	99	92
7-18 years	100	104	151	102	115	48	63	60
19-34	100	128	161	105	105	93	107	101
35-54	100	99	79	100	98	117	118	113
55-70	100	83	54	96	91	117	101	109
71 years	100	57	25	93	89	106	69	97

***Source**: Gemius - gemiusAudience 2015-01*

6.5 Internet use and devices – differences level out

In Denmark, 91 % of the population aged 16-89 have access to the internet at home. For younger people, the number is even higher, and only a very small share of the population (3-4 %) do not have internet access.

Table 17: Share of the Danish population aged 16-89 (%) who have never used the internet, or have used the internet every day or nearly every day:

2014	Every day or nearly every day	Never used the internet
All	**81 %**	**6 %**
16-24 years old	95 %	0 %
25-34 years old	95 %	0 %
35-44 years old	91 %	0 %
45-54 years old	87 %	1 %
55-64 years old	75 %	3 %
65-74 years old	65 %	12 %
75-89 years old	31 %	41 %

Source: *Statistics Denmark - IT use in the Danish population 2014.*

The share of the population that use the internet every day has been steadily increasing in recent years, while the share of the population that never uses the internet has fallen. Age is a crucial factor when it comes to how often Danes use the internet. 95 % of people aged 16-24 use the internet every day, compared to only 31 % of people aged 75 years old or older. The oldest people use the internet the least, and 41 % of people aged 75-89 have never used the internet.

The most popular device used to access the internet is the laptop, which is used by 81 % of the population. From 2013 to 2014, the smartphone and tablet have become more popular ways of accessing the internet. In 2014, 74 % of the population used a smartphone to access the internet, compared to 51 % in 2013.

Tablets have also become a popular way of accessing the internet. In 2014, more than half of the population used a tablet to access the internet, compared to a just a third in 2013. In 2014, for the first time a greater number of people used a tablet than a PC to access the internet.

Table 18: Share of the Danish population aged 16-89 (%) who have used different types of IT equipment for internet access. 2014:

2014	Laptop	Smartphone	Desktop	Tablet
All	**81 %**	**74 %**	**44 %**	**55 %**
Men	81 %	74 %	47 %	54 %
Women	80 %	74 %	40 %	55 %
16-24 years old	93 %	91 %	39 %	55 %
25-34 years old	90 %	89 %	34 %	59 %
35-44 years old	90 %	89 %	42 %	74 %
45-54 years old	88 %	84 %	53 %	64 %
55-64 years old	80 %	66 %	51 %	50 %
65-74 years old	66 %	49 %	50 %	40 %
75-89 years old	36 %	22 %	32 %	19 %

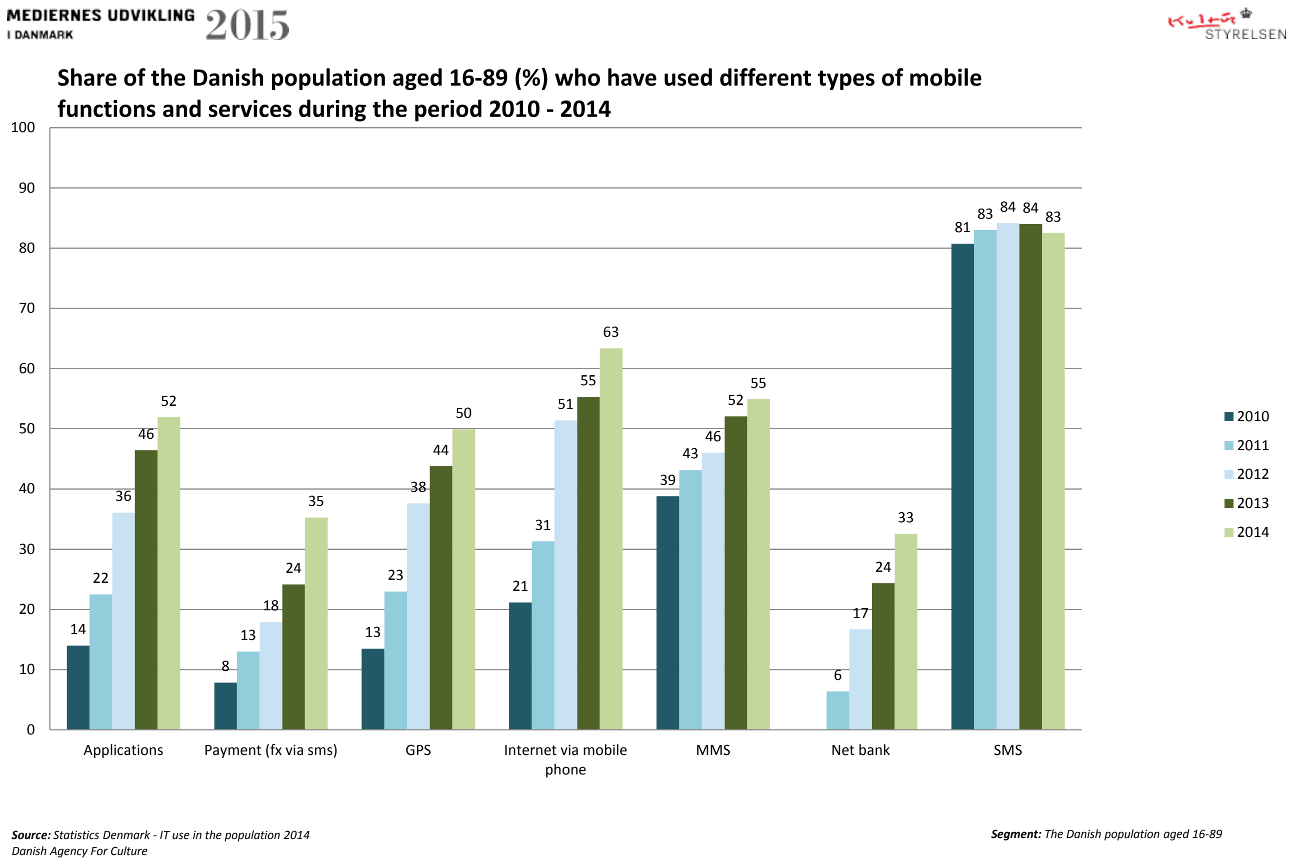
Source: *Statistics Denmark - IT use in the Danish population 2014.*

Age plays a crucial role in which equipment Danes use to access the internet with. Around 9 out of ten younger Danish people uses a smartphone to access the internet, while 20 % of people aged 75 years old or older use a smartphone to access the internet.

In addition, across all age groups in the Danish population, the smartphone is the preferred device for accessing the internet outside the home, 64 % of the population use a smartphone to do this. Only 34 % use a laptop and 22 % use a tablet to access the internet when they are on the move or outside the home.

Nine out of ten Danes have used a mobile phone or smartphone in the last three months, and the mobile phone is popular with all the age groups. The increasing use of smartphones in recent years has meant that mobile phone access is used for services that depend on the internet. In 2010, 21 % of the population accessed the internet via a mobile phone, in 2014 that figure has risen to 63 %.

Figure 13: Share of the Danish population aged 16-89 (%) who have used different types of mobile functions and services during the period 2010–2014:



In 2014, there is almost no difference in the share of men and women who access the internet via a mobile phone. From 2010 and onwards, a gradual evening out in the difference between the genders has taken place. Where internet-based mobile phone functions and services have in the first instance, gained popularity among young men, these functions are now used by the general population and to a high degree by women and to a greater degree, older people.

However, for most mobile functions, there is still a correlation between age and use. In 2014, the share of young people who used the internet via a mobile phone has only changed slightly since 2013. On the other hand, there has been a significant development in older age groups during the same period, and the growth rate increases with age.

Table 19: Share of the Danish population aged 16-89 (%) who have used the internet via a mobile device – across age groups. 2013-2014, Index of development from 2013-2014: 2013 = Index 100:

Year	All	16-24 years old	25-34 years old	35-44 years old	45-54 years old	55-64 years old	65-74 years old	75-89 years old
2013	55.0 %	87.0 %	83.0 %	78.0 %	56.0 %	37.0 %	16.0 %	2.0 %
2014	63.4 %	90.0 %	88.7 %	81.4 %	71.8 %	48.7 %	26.7 %	5.9 %
Index	155	103	107	104	128	132	167	295

Source: *Statistics Denmark - IT use in the Danish population 2013-2014.*

When we look at mobile users rather than the whole Danish population, 60 % of mobile users use a mobile device to access the internet in 2012. In 2014, this figure has increased to 70 %. For senior mobile users over 75 years old, there is an increase, from 14 % in 2012 to 31 % in 2014.

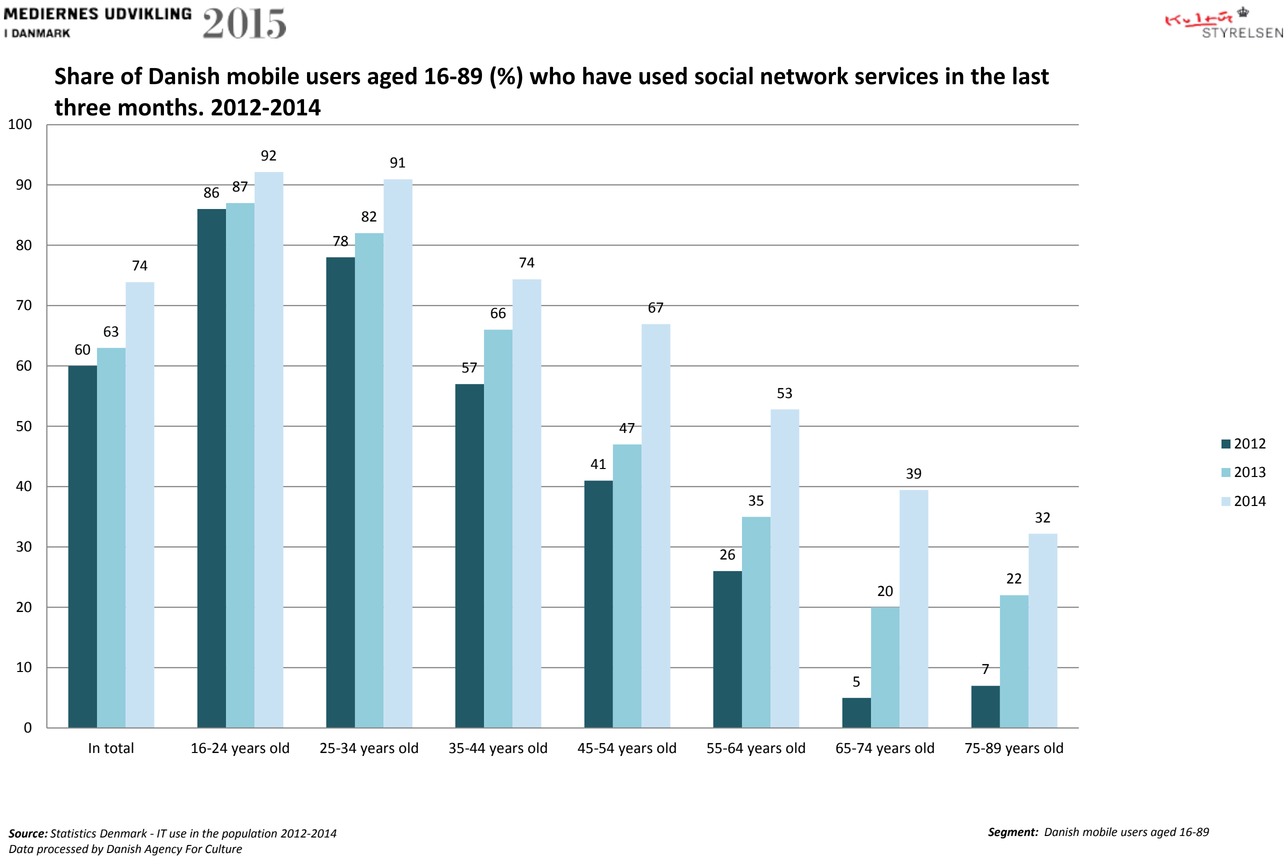
68 % of the population have read or downloaded news on the internet – 72 % men and 64 % women. 88 % of the population with a higher education have read or downloaded news on the internet. In addition, the use of online news is larger in Capital Region of Denmark than in any other region.

The share of the population that have read or downloaded news varies with age, but when we narrow our focus to "mobile users", more than 60 % of all age groups have read or downloaded news on a mobile device. The variation between the age groups is markedly less when we look at mobile users in isolation rather than the general population.

The social network services are popular, and in 2014, 62 % of the Danish population are connected to a social network service. Among people aged 16-24, 94 % use a social network service. 10 % of the Danish population who are 75 years old or older, use social network services, while 32 % of mobile users who are 75 years old or older use social network services.

Thus, there is still a difference in the age groups' use of the internet in relation to the different social network services, but in recent years this difference has evened out in relation to gender and age-specific differences.

Figure 14: Share of Danish mobile users aged 16-89 (%) who have used social network services in the last three months. 2012-2014:



The development for 2012-2014 in relation to the use of news on the internet and social network services shows that a number of age-specific and gender-specific differences to an increasing degree are evened out. When we look at mobile users rather than the whole of the Danish population, we can see that the oldest mobile users have experienced the strongest growth when it comes to the use of these functions and services. This shows that when the older age groups have first acquired a mobile device, they readily use its mobile capability, its internet function and the different internet services.

Streaming

Younger people in Denmark in particular have long ago made it a habit to watch TV when and where they want to. They use a number of different streaming options, where free streaming services and subscription based streaming services are two of the most popular forms of streaming. Just under half of the Danish population does not use any form of streaming.

45 % of the Danish population (aged 16-89) had streamed film, series or TV programmes within the last three months in 2014. The use falls with age. 80 % of people aged 16-24 have used streaming services for this purpose, while only 6 % of people aged 75-89 have done so (Source: Statistics Denmark).

A study carried out by the Danish Competition and Consumer Authority, shows that the majority of Danish households only have a single streaming service, which they pay for with a fixed subscription. 61 % of Danes, who stream, pay for a single service, while 25 % pay for two or three services. A third of Danes with a subscription on one or more streaming services use the streaming services they pay for on a daily basis.

Table 20: Share of Danish streaming services users (18 +) (%), who have seen their streaming consumption of film and TV fall or increase in past year. 2014:

2014	Declined	Increased	Same	Don't know
In total	**7 %**	**51 %**	**40 %**	**2 %**
Men	7 %	52 %	40 %	2 %
Women	7 %	50 %	40 %	3 %
18-29 years old	7 %	61 %	30 %	1 %
30-39 years old	7 %	54 %	38 %	1 %
40-49 years old	4 %	55 %	39 %	2 %
50-59 years old	10 %	39 %	48 %	3 %
60-69 years old	10 %	26 %	59 %	5 %
70 years old or older	9 %	26 %	61 %	4 %

***Source**: Megafon: Danish Competition and Consumer Authority report Streaming, October 2014.*

Over half of the users who were asked about their streaming services in the survey responded that their streaming consumption had increased in the last year.

In line with the Danish population streaming more, a share of Danes have reduced their traditional TV viewing. 37 % of the Danish population with a traditional TV subscription, see less traditional TV after they have started to use streaming. 54 % of the Danes aged 18-29, respond that they see less traditional TV after they have started to use streaming. However, 62 % with a traditional TV subscription respond that the level is the same as previously. For many users, streaming is a supplement to the traditional TV packages and traditional TV viewing.

Learn more about internet use and devices on the report's website.

7. Public service and non-public service media

In the Nordic countries, public service media have a much greater role than in other western countries. It is stated in the public service contracts for DR and the regional TV 2 stations (but not in TV 2 DANMARK A/S's licence), that they must be represented on relevant platforms and Radio24syv's licence, that they must have their own website.

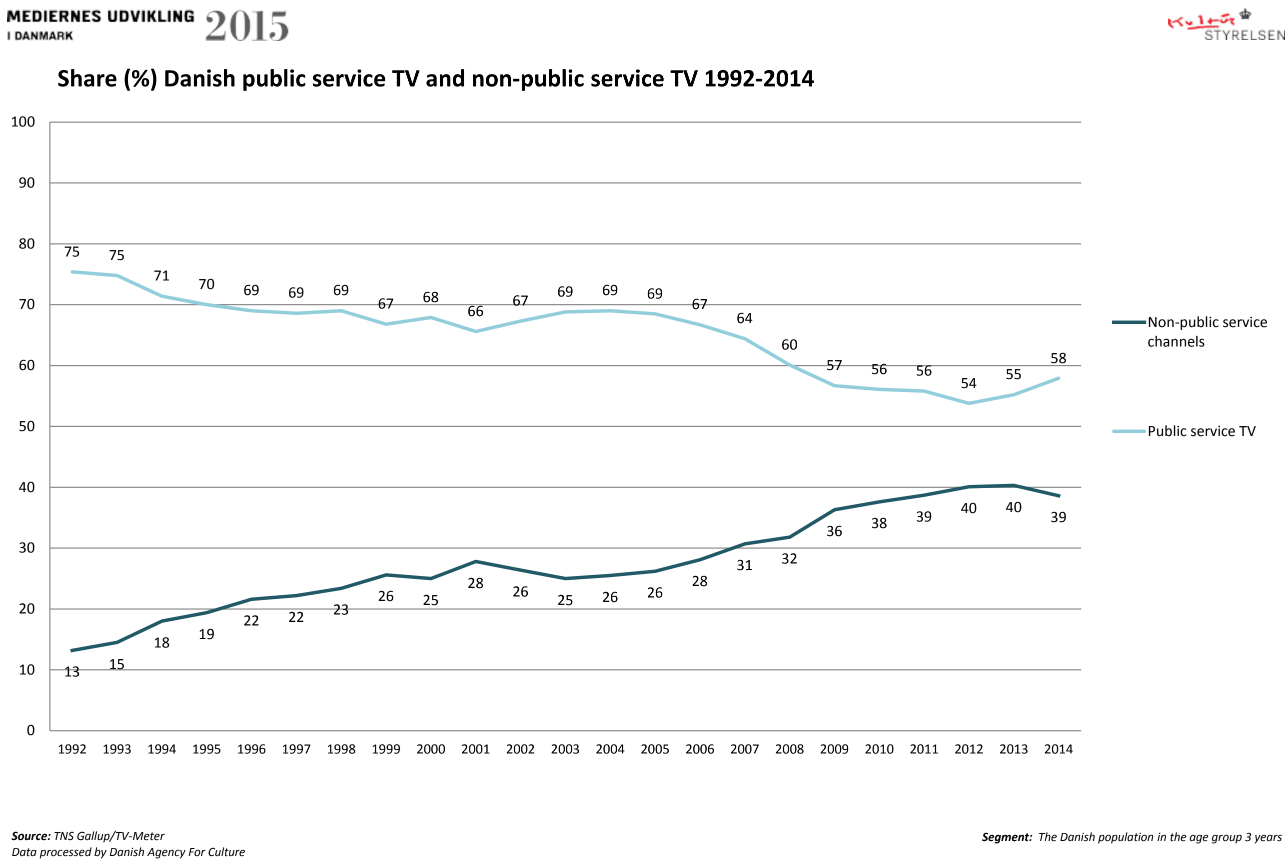
In the following text, a brief overview of the development in relation to public service media on the different platforms in the last year.

7.1 Television

With 58 %, public service TV has the largest share of the Danish population's traditional TV viewing. There is a 3 and 4-percentage point increase in relation to 2013 and 2012 respectively, which represents the lowest public service share since 1992. In contrast, non-public service TV has fallen by 1 percentage point from a share of 40 % in 2013 to 39 % in 2014.

The increase in public service TV is due to an increase in DR's share, which has increased by 2.5 percentage points in the period 2013–2014, while TV 2 in general has maintained its share (increased by 0.2 percentage point). Regional TV has an unchanged share of 0.7 %.

Figure 15: Danish public service TV and non-public service TV's share of TV viewing (share (%)) from 1992–2014



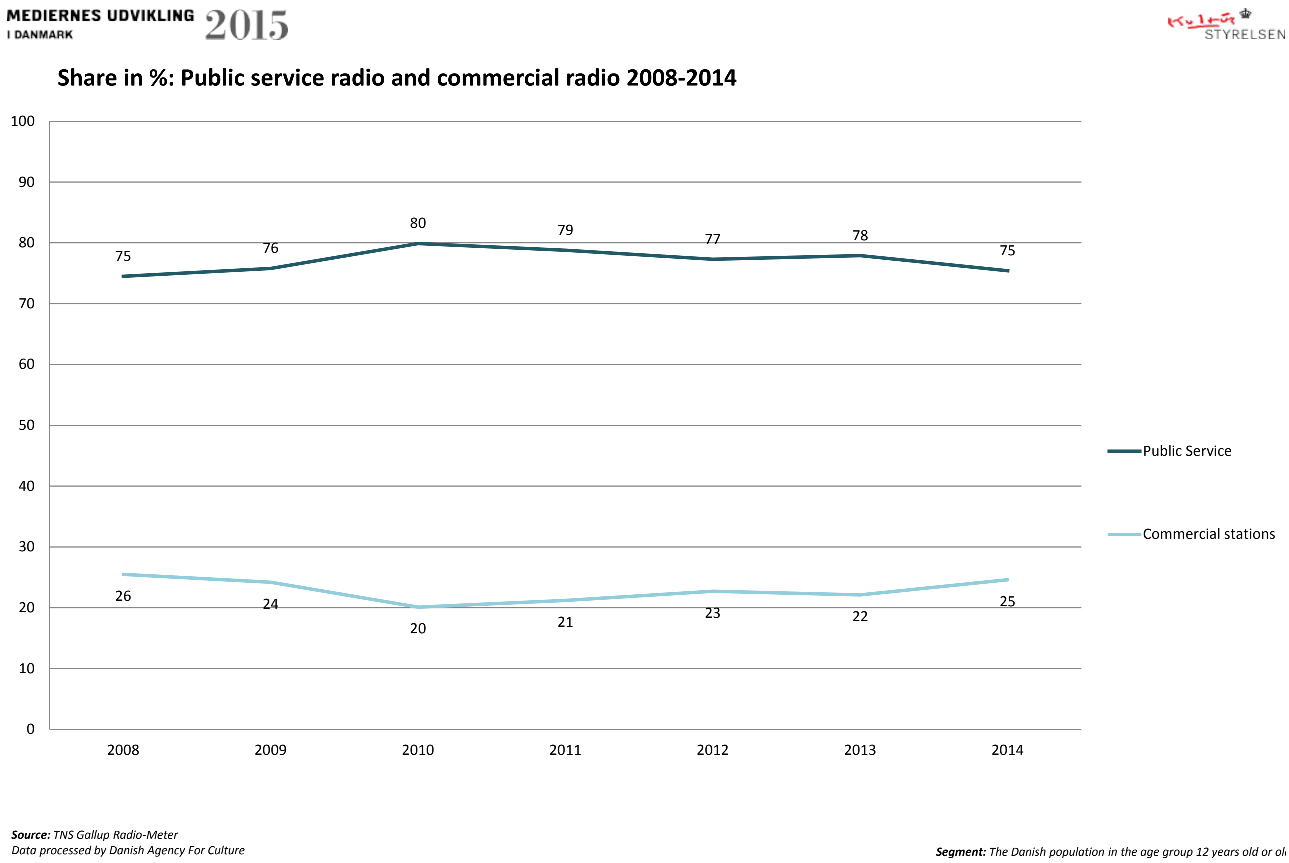
In particular, there has been a relatively strong increase in public service TV's share among younger viewers. There has been an increase of 5 percentage points for children aged 3-11, and 6.4 percentage points for children and young adults aged 12-18. Among seniors aged 71 years or older, the public service share is more or less unchanged from 2013–2014. An increase in the youngest age group for public service TV can presumably be put down to DR's launch of targeted channels for the youngest and slightly older children respectively. However, there is a still a tendency that the older the age groups, the greater a share of public service TV. The exception here is children aged 3-11, who also have a relatively high share of public service TV in their traditional TV viewing (57%).

Both public service television and non-public service television are seen by a large section of the Danish population during any given week. The weekly reach, which is an expression of the media's reach during a week (how large a share have watched five consecutive minutes on the channels in question) was 87.9 % for public service television in 2014 (compared to 87.9 % in 2013), while it was 71.3 % for non-public service television (compared to 73.9 % in 2013).

7.2 Radio

Just as public service TV has the largest share of the Danish population's traditional TV viewing, public service radio has the largest share of the Danish population's radio listening. And it is even higher than compared to TV: 75 % of radio listening is on public service radio, while 25 % is on commercial stations. However, there is a fall of 3 percentage points in public service radio's share from 2013–2014, while the commercial stations have seen an increase of 3 percentage points. Public service radio has fallen to the same share of listeners it had in 2008, while the commercial stations share is 1 percentage point less than the 2008 level. In general, there has been a constant increase in the share for the commercial stations since 2010, which at 20 % had the lowest share for any recorded year.

Figure 16: Share (%) (share of radio listening) for public service radio and commercial radio, 2008-2014



There is a clear correlation between the share of public service radio that accounts for one's listening and age. That is, the older the person, the greater the share of public service radio they listen to. For people aged 70 years old or older, 98 % of their listening is on public service radio – a level that has been relatively stable throughout 2008–2014. For people aged 55–69, there has been without an exception, a fall in the share in public service since 2010. Even so, the public service share is 78 % in 2014, a continued relatively high share, but it was 92 % in 2010. The biggest fall is with children and young adults aged 12–18, where from 2013–2014 there has been a fall in the public service share of 6 percentage points to 53 % in 2014. This is the lowest share of all of the age groups. Radio24syv maintains its share of 2 % of listening in 2014.

Public service radio and commercial stations also have a high weekly reach. For public service radio there has been a weekly reach in 2014 of 83 % (same level as 2013), while for the commercial stations it was 63 % (also same level as 2013).

7.3 The internet

When the total number of users is taken into consideration, there is not a large difference with the media groups with national daily newspapers and national public service media, However, it should be noted in relation to this, that the media group "National daily newspapers – All" consists of nine different media, while "National public service" consist of two different media. For a more detailed definition of the individual media groups, see section 10.1 below.

In 2015, the net number of users from the multiplatform measurement that measures across desktop, mobile, and tablet, is approx. 3.5 million users (January 2015) for both media groups. In last year's report, the two media groups (November 2013) each had approx. 2.5 million users measured on the desktop platform. On paper, the multiplatform figures for the national daily newspapers and national public service media show increased coverage, but the mutual balance of power between the media groups is the same.

Both "National daily newspapers – All" and "National public service" have a monthly reach across platforms of around 70 % in 2015. The figure for the desktop platform alone in last year's report showed that both media groups had a reach of around 55 %. However, if we look at the average daily reach, we can find differences. In January 2015, the media group "National daily newspapers – All" has with 31 % an average daily reach across platforms that is higher than the media group "National public service" with 24 %.

Table 21: Monthly reach for regional/national daily newspapers and public service media. January 2015:

Media groups	All	7-18 years old	19-34 years old	35-54 years old	55-70 years old	71 years old or older
National daily newspapers - All	70 %	72 %	74 %	70 %	68 %	66 %
National daily newspapers: Omnibus/business	*57 %*	*54 %*	*60 %*	*55 %*	*56 %*	*58 %*
National daily newspapers: Tabloid	*55 %*	*54 %*	*62 %*	*57 %*	*51 %*	*42 %*
Regional daily newspapers	28 %	17 %	28 %	31 %	30 %	27 %
National public service	69 %	79 %	73 %	68 %	63 %	62 %
Regional public service	20 %	12 %	21 %	23 %	20 %	14 %

***Source**: Gemius - gemiusAudience 2015-01. Segment: Danish internet users aged 7 years old or older*

The media group with regional daily newspapers has with 28 % an average monthly reach that is higher than the media group with national public service media, which has a reach of 20 %. The average daily reach with 6 % double as high for the media group "Regional daily newspapers" than "Regional public service" with 3 %.

By comparing the two different parameters for user behaviour in relation to the media groups, the media group with national daily newspapers looks markedly different. Especially in relation to page views, visits and time spent, the media group dominates compared to the public service media. User behaviour in relation to the media group with the national public service media is however in general, more uniform across gender and age than compared to the other media groups.

Table 22: Average time consumption per user per month. January 2015:

Media groups	Time consumption per user	Visits per user	Page views per user
National daily newspapers - All	03:06:48	46	152
National daily newspapers: Omnibus/business	00:56:51	19	47
National daily newspapers: Tabloid	02:59:27	40	146
Regional daily newspapers	00:29:40	11	42
National public service	01:46:50	23	74
Regional public service	00:08:29	6	11

Source: Gemius - gemiusAudience 2015-01. Segment: Danish internet users aged 7 years old or older

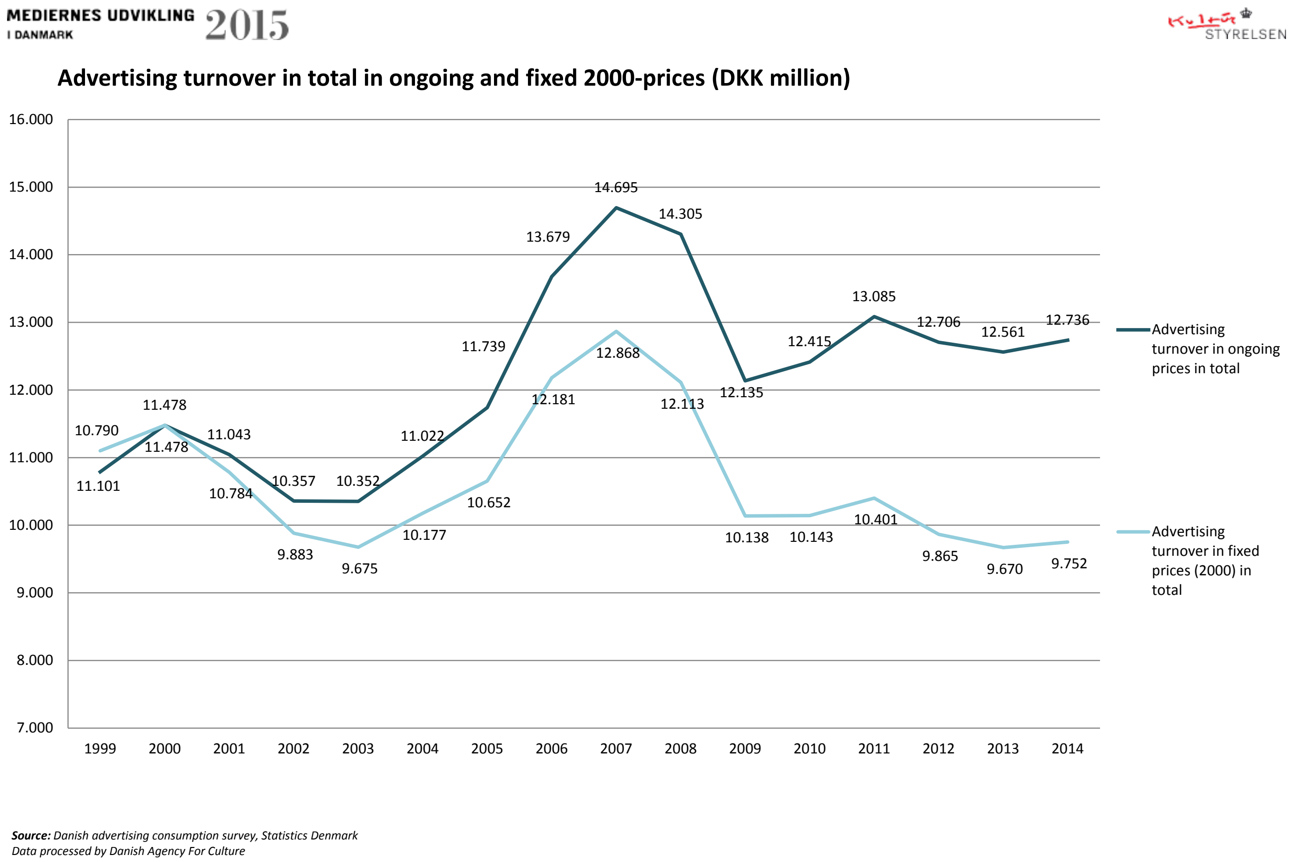
However, it is important to keep in mind that the media group "National daily newspapers – All" consists of nine different media, and that the special sub-group with tabloid newspapers affects the result for the media group when it comes to these parameters, which can be seen in the table above.

8. Sector: Advertising consumption and advertising turnover for foreign companies

It was described above how household consumption expenditure spent on media-related consumption items has developed since 1994, both overall and by sub-item. A second crucial element in the media companies' finances is advertising consumption – which perhaps can be considered as a large part of a business enterprise's "media-related consumption items".

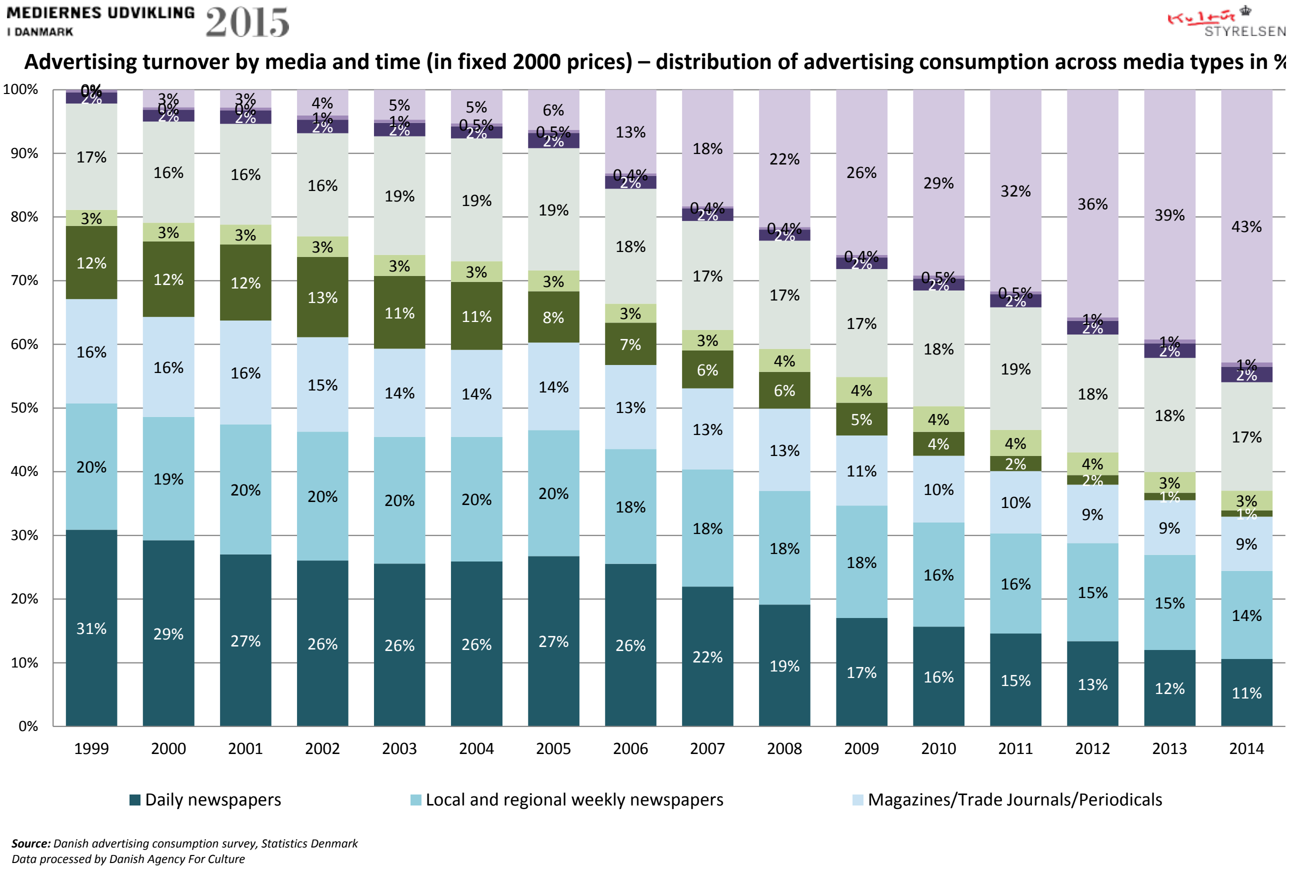
Advertising turnover during the period 1999–2014, has been far from stable. Advertising turnover to a certain degree reflects the economic trends, and the impact of the socio-economic crises can be seen in the graph, for example the IT bubble that burst in 2000, which affected advertising turnover up until 2004. From thereon, advertising turnover increased until 2007, when house prices were at their highest. From the end of 2008, the financial crisis really began to bite in Denmark, which can clearly be seen by the trend in Figure 17. There is an increase from 2013–2014, but the levels both in fixed prices (i.e. without inflation) and ongoing prices have continued to be a long way from the level in 2007.

Figure 17: Advertising turnover in total in ongoing and fixed 2000 prices (DKK million)



If we look at how advertising consumption is distributed across the different media groups as it is shown in figure 18 below, we can see that some media groups have not only been hit by the economic trends, which can be seen in figure 17 above, they have also been hit very hard by the technological development, which through the advance of the internet and the transfer of media consumption to digital platforms, has heavily rearranged advertising turnover's distribution between the media groups. In 2000, internet advertising accounted for almost 3 % of total advertising turnover. 14 years later internet advertising turnover accounts for no less than 43 % of the total advertising. TV media's share of the companies' advertising budget has generally remained constant during the entire period – between 16 % and 19 %, and the local weekly newspapers have not lost share anywhere near to the same extent as the other media groups have. During the entire period 1999–2005, local newspapers accounted for 20 % of advertising turnover, but this has gradually fallen since then, and accounts for 14 % in 2014. The daily newspapers have been hit quite differently, in 1999 they were the largest advertising media, with almost 31 % of the total advertising. In 2014, this share had reduced to almost 11 %. So daily newspapers' readership and their advertising turnover have been hit harder than the local weekly newspapers. Both radio and cinema maintain about the same share of advertising turnover – however, at a very low level, while annual publications have been strongly reduced.

Figure 18: Advertising turnover by media and time (in fixed 2000 prices) – distribution of advertising consumption across media types in %.



A crucial factor in relation to the financing of media content – perhaps especially publicistic content– in Denmark is, how large a share of the advertising that is aimed at the Danish market, which is sent to foreign companies, which did not produce the Danish publicistic content. In other words, the larger the advertising turnover that is sent to foreign companies, the less the share there is to produce media content in Denmark. As table 23 below shows, the share of the total advertising turnover that is aimed at Denmark, but which goes to foreign companies, grew from 3 % in 2007 to 22 % in 2014. Looking solely at advertising turnover on the internet, both in 2013 (51 %) and 2014 (52 %) there has been a larger share of advertising that goes to foreign companies than to Danish companies. The corresponding share in 2007 was 19 %.

Table 23: Share of total advertising turnover in Denmark, which is sent abroad – 2007-2014

	2007	2008	2009	2010	2011	2012	2013	2014
Share of total advertising turnover in Denmark, which is sent abroad	3 %	5 %	9 %	11 %	13 %	17 %	20 %	22 %
Share of advertising turnover on the internet in Denmark, which is sent abroad	19 %	24 %	33 %	37 %	43 %	47 %	51 %	52 %

Source: *Danish Media research for Danish Agency For Culture, own calculations*
Data processed by the Danish Agency For Culture.

Learn more about the sector and consumption on the report's website.

9. The special reports – the main conclusions

In the first six months of 2015, three special reports were published on the reporting website, with major analyses of " Medieetik"(Media Ethics) (Roskilde University), "Journalistiske kvaliteter 1999-2014" (Journalistic Qualities 1999-2014) (Roskilde University) and "Danskernes mediebrug 2014 – hverdag og demokrati "(Danes Media Use 2014 – daily life and democracy) (University of Copenhagen) The main conclusions from these three reports are reviewed below. All three reports are available in Danish in their full edition on the report's website.

9.1 Media Ethics

In the special report “Media Ethics”, the results of a comprehensive mapping of Danish media's ethics was presented. The study consist of an analysis of Danish Press Council practice since its creation in 1992, a survey of Danish news media's internal guidelines, a comparative study of these guidelines over time, and a survey carried out among journalists and an interview study with journalists and editors.

The study shows that Danish Press Council practice is relatively uniform over time, despite however evidence of several companies becoming more aware of how they can use the Press Council. Many of the media's internal guidelines for ethics are a specification of the recommended press ethics rules for individual media.

The journalists and editors who were interviewed in the study support the Danish Press Council's work in general, and the Danish Press Council is described as a place that sets the limits for what you may or may not do. However, many journalists have never experienced that a failure to comply with the ethical rules led to sanctions. In particular, it is the critical news stories where press ethics are articulated, and here internal guidelines can function both as a catalyst for and block of discussions of specific stories.

The total number of guidelines devised by the media has increased markedly over the last few years, and 65 % of the news media that was looked at in the study have written rules. The most detailed ethical guidelines are found in the national media – especially morning newspapers and the public service media. 43 % of net media (both the independent and those associated with media) are not registered with the Danish Press Council, and compared to the more traditional media groups, few of them have guidelines regarding complaints and debate.

The growth in the number of guidelines can be interpreted as an expression of a more ethical approach by the media, but it can also be interpreted as an expression of several problems with ethics and an increased need for rules. The development of ethical guidelines can also be interpreted as increasing professionalism among media companies.

The interviewed journalists refer often to the industry regulations for good press ethics and the media's own internal guidelines, when they describe what they mean by good press ethics. But at the same time press ethics is diffuse, something you "just know when you're a journalist", a practice based on knowing what is right instinctively, and which does not necessarily need to be discussed much in the daily news work. There is a tendency for journalists to find that the general ethics in the press is markedly worse than compared to their own workplace and the journalism they produce themselves.

If we look at the content of the ethical guidelines, the majority of the rules are about journalistic work processes. On the other hand, most widespread guidelines are about the journalistic content and they align with the industry regulations for good press ethics.

Furthermore, the analyses show that in the interviewed journalists’ experience, the challenges faced by press ethics may be from increased commercialisation, increased competition and a labour market for journalists that is under pressure.

The study paints an overall picture where it is possible to talk of a journalistic ethic that extends across media groups and journalists, where there is relatively uniform agreement on what good ethical practice is.

How the report's many conclusions are interpreted depends on which ethics ideals you have. But it is highlighted in the report, that the journalists' strong awareness of press ethics, the increased number of internal guidelines in media groups and journalists and editors' support for the Danish Press Council, must overall, be interpreted as being positive for Danish journalism in 2014.

Despite this, the report identifies some problems. This is particularly true in terms of a lack of consequences for any breach of press ethics; that the increasing faster news cycle in many ways puts pressure on ethics, and that many of the new net media do not have the same focus on media ethics as the traditional, established media groups.

You can read more details in the special report "Media Ethics" on the report's website.

9.2 Journalistic qualities 1999-2014

The special report "Journalistic Qualities 1999-2014", builds on an open, empirical and descriptive approach to journalistic qualities. The study seeks to empirically unearth which quality terms, which are found in practice, rather than a measurement in relation to theoretical definitions. The study thus describes the journalistic qualities based on a number of research-based parameters rather than assessing them.

The report's descriptive approach does not provide an answer as to whether the quality of news media has improved or worsened. On the other hand, the report presents data that as whole indicates that quality has changed. For example, most media uses more sources in 2012 than in 1999, and the share of hard news has increased in the same period.

The report shows that the publicism and democratic journalistic role is strong in Denmark, both in relation to Danish news media's self-perception, news content and in relation to the assessment of journalists, politicians and media users. In general, the quality criteria across the media types and platforms in relation to journalistic practice is independence, neutrality and credibility. In relation to the content, most news media focus on emphasis on basic journalistic standards such as factuality, and materiality, actuality and speed, depth, perspective, entertainment value and offering the target group useful and unique news content.

Journalists, politicians and citizens in general support the publishing ideal and a classic democratic journalistic role, which embodies communication, creating debate and controlling the establishment. On the question of specific quality parameters, journalists and politicians are in general in agreement. However, compared to journalists and media users, more politicans believe in their experience that the journalistic quality has worsened.

Furthermore, looking across the analysis it is possible to see a differentiation between "print quality", which is characterised by a relative high degree of processing, an increase in the share of background material and the use of several sources, and a "net quality", which is characterised by a relatively lower degree of processing, an increase in the share of news material and the use of fewer sources.

You can read more details in the special report "Journalistic qualities 1999-2014 " on the report's website.

9.3 Danes Media Use 2014 – daily life and democracy

The Danish media environment is increasingly becoming a multimedia environment. The special report "Danes Media Use 2014 – daily life and democracy" looks at the 2014 media environment based on the users' perspective: Who uses what media, and how media use is incorporated into daily life and democracy.

The report presents two mutually linked studies:

Firstly it lays out a broad documentation for the Danes media consumption across the technological platforms, with particular reference to changes that the spread of the internet and mobile media has brought about.

Secondly a more detailed and focused analysis of media use's democratic perspectives is carried out, which examines to what extent the Danish population's use of many different media platforms constitutes a strength or perhaps a challenge for the public sphere, which the media and citizens together constitute.

A common denominator of the two sub-studies is the idea of community in the use of media, and thus in the political and cultural agendas, which the population keeps itself up to date with, and in the final analysis, acts on.

A central result is that the traditional platforms – TVs, radios and printed newspapers – continue to constitute a very crucial share of media use, both in respect to the individual media's penetration and to the time spent on each media. The report, based on a multimedia study, clarifies and provides detail of this overall picture in relationship to different demographic segments in the population, not least the use of the internet and mobile media among younger and older media users, respectively.

The first part of the report is summed up in a typology, based on the most ordinary combinations of media use on different media platforms in different parts of the population: "mainstreamers", "media traditionalists" and "media pluralists". For the vast majority of the Danish population, the day's media environment constitutes a menu, where a number of different media forms supplement and complement each other. Also the young media users combine to a great extent, old and new platforms in their total media use.

The report focuses on the news media as a democratic resource. Based on an analysis of media use's democratic perspectives, the results indicate that firstly, there is a significant intersection of different kinds of news on different platforms, and secondly, Danish media users typically receive a range of news from several media and platforms. At the same time, there is a fairly large difference between the respondents, relative to their knowledge about the contents of news – difference, which has a correlation with media use and demography alike, including the level of education.. Despite a widespread expectation that the new platforms enable citizens to a greater extent to distribute and discus the news themselves, the results indicate that such an active use of the news is limited so far.

You can read more details in the special report "Journalistic qualities 2014" (in Danish) on the report's website.

10. Method

10.1 Note for section 2 in The Summary 2015

In relation to the figures in section 2 in the summary, it is important to be aware of several factors:

1. For all of the different media types, the age group is people aged 16-89, since this is the age group that is included across all of the measurements and surveys. In the subsequent sub-sections on the individual media in this summary and sub-chapters in the other reports, it will be the age group that is included in the measurement of the media in question which is used (e.g. three years old or older for TV, 12 years old or older for radio and print media, etc.)

2. The numbers in the figures in the section are taken from different official, accepted media industry measurements of consumption on the different platforms and surveys from Statistics Denmark. In other word, the figures are taken from different random samples and have been collected using different data collection methods. In this way, they are not completely comparable but represent the most precise figure for the consumption on their respective platform.
3. The figures show the *share* that has a specific activity but does not show anything about the extent - how much or for how long someone has carried out the activity in question.

For TV and radio, it is the average daily reach (AvReach %) – how large a share have seen or listened to at least five consecutive minutes during the day. In relation to daily newspapers, it is the average daily coverage – i.e. how large a share on average read a daily newspaper every day.

For the local weekly newspapers however, it is the average weekly coverage.

The figure for the use of the internet is the share that has responded that within the last three months they have used the internet daily or nearly daily, while the figures for streaming of film/series/TV programmes are the share that has answered that they stream daily or almost daily.

Lastly, the figures for the daily use of web-based media are calculated as the average for January 2015, since it is only from 2015 that the total figure can be extracted across platforms. Therefore, in relation to the use of the web media, there are only figures for January 2015 and not from before. The figures for web use do not cover figures for the use of/traffic via apps, as this is not measured.

Gallup/TV-Meter has solely measured the traditional viewing of linear (flow) TV in Denmark up until December 2013. This means in general that the figures for TV viewing do not contain results for viewing TV on other platforms and on the new on-demand providers and streaming platforms, e.g. YouTube, Netflix and HBO Nordic. From and including 1 December 2013, the measurements of TV viewing on computers (PC and MAC) is included in the measurement but is not shown separately. However, viewing on computers is only included in the measurements to a degree, since only viewing up to approx. a week after the broadcast on TV is included.

The media group "news media" covers in section 3 in the summary the following aggregated titles (sites):

Included news media (sites)
180grader.dk, altinget.dk, amtsavisen.dk, aoh.dk, avisen.dk, berlingske.dk, borsen.dk, bt.dk, business.dk, dagbladet-holstebro-struer.dk, dagbladetskjern.dk, dagens.dk, denkorteavis.dk, dinby.dk, dknyt.dk, dr.dk, eb.dk, folkebladetlemvig.dk, folketidende.dk, frdb.dk, fyens.dk, helsingordagblad.dk, hsfo.dk, information.dk, jp.dk, jv.dk, kristeligt-dagblad.dk, lokalavisen.dk, minby.dk, mja.dk, mx.dk, newsbreak.dk, nordjyske.dk, politiken.dk, raeson.dk, sn.dk, stiften.dk, tv2.dk, tv2fyn.dk, tv2lorry.dk, tv2nord.dk, tv2oj.dk, tveast.dk, tvmidtvest.dk, tvsyd.dk, ugeavisen.dk, vafo.dk, viborgfolkeblad.dk

11. Sources and use of results

Source for figures used in the summary:

Television viewing: Gallup/TV-Meter

Radio listening: Gallup/Radio-Meter

Listening to commercial local radio: TNS Gallup Local Index

Newspaper reading: Index Danmark/Gallup

Local weekly newspapers: Lokal Index Danmark/Gallup

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

Internet use in general: Statistics Denmark

Sector economy and employment: Figures provided by Statistics Denmark

Household consumption: Statistics Denmark – extract from StatBank Denmark (FU5) and figures provided by Statistics Denmark

At all times if the data is used, the original source (e.g. Gallup/Index Danmark (and base), Statistics Denmark (and table), the Danish Audit Bureau of Circulation (audited circulation or similar) and Danish Agency For Culture, Report on the media's development 2015 must be stated. Further sale or other commercial utilisation/use of the data is not permitted in any form.

12. Figure list

13. Table list