



MEDIA DEVELOPMENT IN DENMARK

2018

SUMMARY AND DISCOURSE



Summary and Discourse 2018

Contents

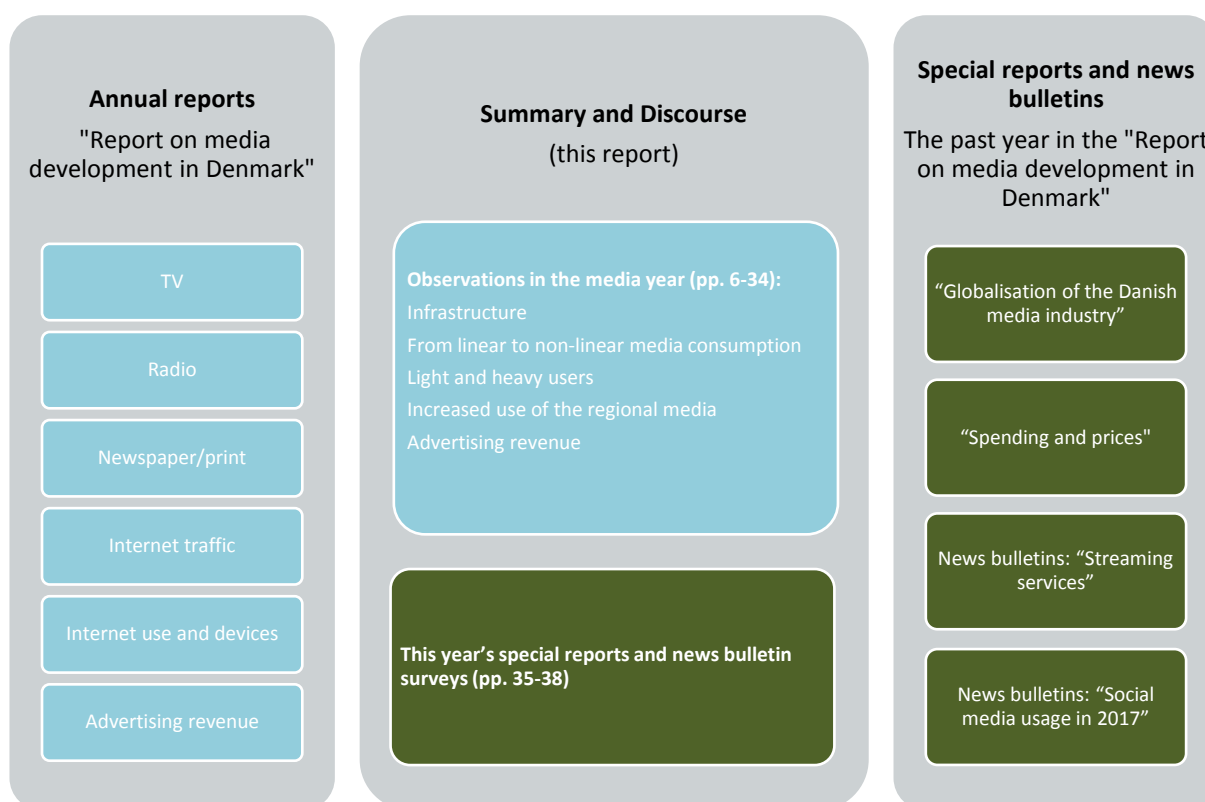
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1 Introduction

This is the fifth edition of the Danish Agency for Culture and Palaces' "Report on media development in Denmark" (Rapportering om mediernes udvikling i Danmark), the first of which was published in 2014.

The media development report for 2018 was prepared in consultation with an external editorial panel set up specifically for the "Report on media development in Denmark". There is a list of panel members here: [external editorial panel for the Report on media development in Denmark](#). The editorial panel consists of seven media professionals – experts, researchers and industry representatives – who have provided advice and suggestions regarding development and prioritisation as well as quality assurance throughout.

The purpose of "Summary and Discourse 2018" is to highlight and discuss the most important conclusions in this year's surveys – from not only fresh studies of media usage in Denmark, but also special reports published in the past year about globalisation of the Danish media industry, the social media, streaming and Danish consumers' media-related spending. The structure of the "Report on media development in Denmark" is illustrated in the model below:



For details, read about media developments in the chapters about the individual platforms.

- [TV](#)
- [Radio](#)
- [Newspaper/print](#)

- [Internet traffic](#)
- [Internet use and devices](#)
- [Advertising revenue](#)

The media world continues to undergo radical change, and technical breakthroughs continue to bring new challenges. The industry attempts to exploit every new opportunity and confronts every challenge it meets on its way. Users are adopting the new (digital) opportunities to widely varying degrees and at very different rates.

Market changes include that we generally watch less flow TV and listen less to conventional radio, and that consistently fewer of us read a printed daily newspaper.

On these facts alone, some might be tempted to conclude that Danes' media use is shrinking. This is not the case. Our media use is shifting.

The developments observed reflect that much of the population is ready for change, i.e. willing to accept new media and adapt to new ways in which to access media content. Danes' use of the more non-linear media services is growing: more of us are listening to podcasts, more of us are streaming TV and streaming TV more often, and more often on demand than in response to the providers' schedules. Moreover, a consistently increasing share of the population now uses the daily newspapers' digital content.

Where the more conventional media, i.e. TV, radio and printed newspapers are concerned, there is an ever-widening gap between the media use of the young compared to that of older members of the population. This is evident as a consistent pattern from 2016 to 2017. Those groups of the population who already use the more conventional media most are those whose use of these media has increased most (or is sustained). These are typically older media users. Conversely, those whose use of the conventional media has fallen most have cut their use most. These are typically the youngest media users.

A large and increasing share of younger media users prefer to access news, TV series and radio programmes where and when they can fit viewing and listening into their personal schedule. Young people's media use is of a kind that older media users have not yet fully embraced. The older generation faithfully continues to use more conventional, scheduled broadcasts and publications, such as printed newspapers, radio and flow TV.

Market developments do not indicate that the conventional media are no longer used. Many people still use the conventional media every day. However, media users have widely accepted the new media and new ways of using them in their repertoire.

For example, the devices that Danish households use to access media content have changed. In the past, they used stationary, single function devices. Now they use mobile, multifunctional devices (smart phones, tablets, etc.) when they are "out and about", on the sofa or in their

rooms. Some of the devices used are still stationary but these are now multifunctional devices used to facilitate media use in the home (smart TVs).

It makes good sense to see media market development from an historical and overall perspective. There is a long-standing tradition for clear and, in some cases, growing differences between media use in different groups of the population. Among others, this is true of the conventional media, i.e. radio, flow TV and printed media.

However, it is also true to say that the population's media use is, in some ways, becoming more uniform. This applies particularly to the newest digital media. Increasing numbers of older people are now streaming programmes on demand and using e.g. their mobile phone, for day-to-day activities. Social media usage is also increasingly widespread among the oldest age groups.

The following paragraphs provide a brief, general summary of developments in the Danes' media use and a description of observations made in the media year that are described in "Report on media development in Denmark 2018". Finally, there is a short summary of this year's special reports and news bulletins published since publication of the 2017 report.

2 Developments in Danes' media consumption

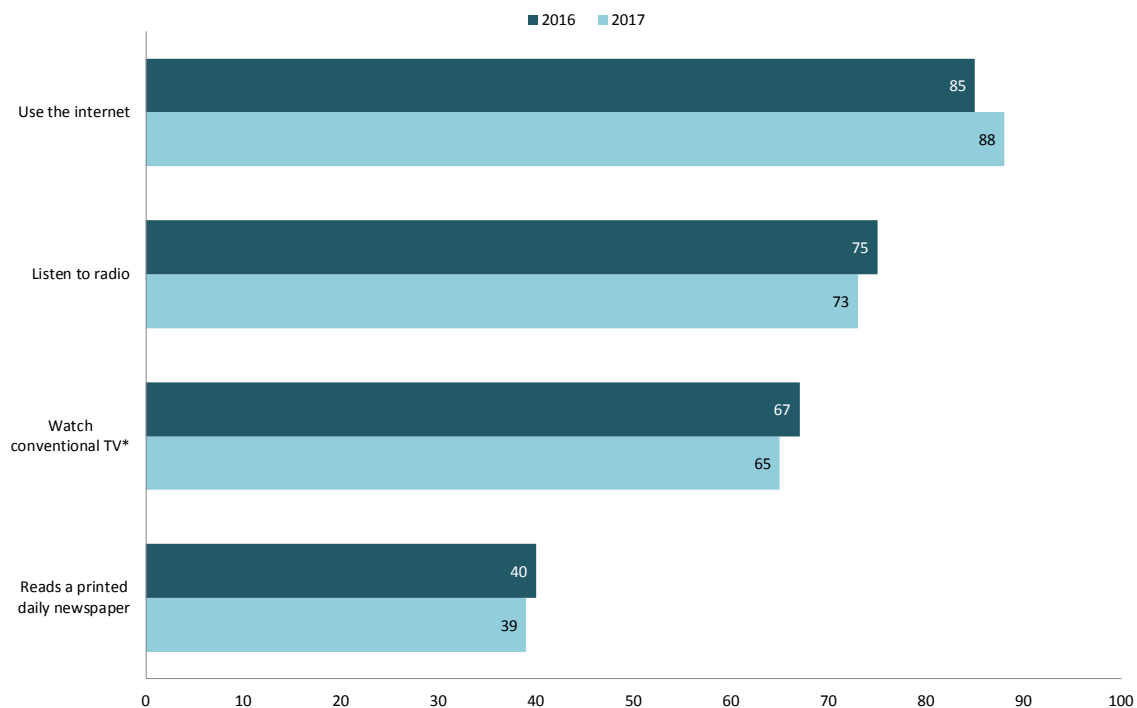
The media platform used by most Danes on a daily basis in 2017 was the internet: 88 % of Danes aged 16-89 used the internet on a daily basis in 2017. This is an increase from 85 % in 2016. The internet provides access to a very wide range of activities, of which media usage is only one. Internet reach in the population is generally high but the rate of increase is no longer as steep as in previous years. Even so, the internet is the only media platform, whose share of daily users is increasing.

The next most frequently used platform in 2017 was radio, to which 73 % of Danes listened on a daily basis. This is 2 percentage points down on 2016.

With a 65 % share of the population, conventional TV was the third most popular daily media activity in 2017.

In 2017, 39 % of the population read a printed newspaper daily. This is a modest decline compared to 2016, where the percentage share was 40.

Figure 1: Percentage share of Danes who use different media platforms on a daily basis. 2016-2017



Source: Statistics Denmark; Kantar Gallup Radio-Meter; Kantar Gallup TV-Meter, Index Danmark/Gallup
Data processed by the Danish Agency for Culture and Palaces

Universe: The Danish population aged 16-89

*) Due to the introduction of new methods in the Kantar Gallup Viewer Survey, the figures for TV in 2017 are not directly comparable with previous years' figures. The figures for 2016 are calculated as live + VOSDAL (Viewed On Same Day As Live) while the figures for 2017 are calculated as live + VOSDAL + TS (Time Shifted) – i.e. including any viewing that took place 1-7 days from the time of broadcasting.

3 Observations in the media year

3.1 The preconditions for media consumption: The infrastructure

The "Report on media development in Denmark" has repeatedly documented that media use in Denmark has over many years become increasingly internet-based, a development which, it seems, persists at pace.

- There are countless opportunities to consume media content on and via the internet. The sheer choice is on the brink of overwhelming. Constantly increasing quantities of media content are made available to the user, the quality of which is improving.
- Internet users upload their own material to the social media and video-sharing services, such as YouTube and blogs, etc.
- Widespread digitisation of society – in which, by European standards, Denmark leads the field – spurs the development of an increasingly internet-dependent daily life for everyone, including the eldest age groups, whose media consumption in many respects is becoming increasingly mobile and digital.

Media development therefore gives rise to a constant need for broadband *availability* at increasingly higher speeds, and for consumers *to have or acquire* internet access (also at increasingly higher speeds) and *to own* state-of-the-art devices that have adequate capacity to run media and other applications.

3.1.1 Broadband reach in Denmark

At the national level, the share of households with broadband reach of up to 100 Mbps (download speed) is high: 91 % in 2017. Ultrafast broadband (500 and 1000 Mbps) reach is lower but growing. For 500 Mbps, reach increased from 45 % in 2014 to 59 % in 2017 and for 1000 Mbps, from 40 % in 2014 to 58 % in 2017.

There are regional differences in broadband reach, particularly at the fastest speeds. Broadband reach is generally lower in Region Zealand, regardless of broadband speed. For example, 38 % of households in Region Zealand have (a technically feasible speed of) 1000 Mbps while as many as 67 % of households in Central Denmark Region have access to the same broadband speed. There are also relatively large regional fluctuations in 100 Mbps reach, e.g. 82 % reach in Region Zealand and 95 % in Central Denmark Region. For 30 Mbps, reach in Region Zealand is at 88 % while there is 97 % reach in the Region of Southern Denmark.

Table 1: Percentage broadband reach (download speeds) for Danish households in 2017

	2 Mbps	10 Mbps	30 Mbps	100 Mbps	500 Mbps	1000 Mbps
National	99 %	98 %	95 %	91 %	59 %	58 %
Central Denmark Region	99 %	98 %	95 %	92 %	67 %	67 %
Region of Southern Denmark	99 %	98 %	97 %	95 %	68 %	65 %
North Denmark Region	98 %	97 %	93 %	89 %	62 %	61 %
Capital Region of Denmark	100 %	99 %	96 %	91 %	54 %	54 %
Region Zealand	98 %	95 %	88 %	82 %	41 %	38 %

Source: The Danish Energy Agency (collection of telecommunications operators' reports of technically feasible speeds, i.e. speeds that the telecommunications operators are capable of offering, if they wish).

Data processed by the Danish Agency for Culture and Palaces

3.1.2 How many Danes have internet access at home? How fast are their internet subscriptions?

Adequate broadband reach is one thing. The share of Danes who have internet access at home and the speed of their broadband connections are two quite different matters that are examined in the following.

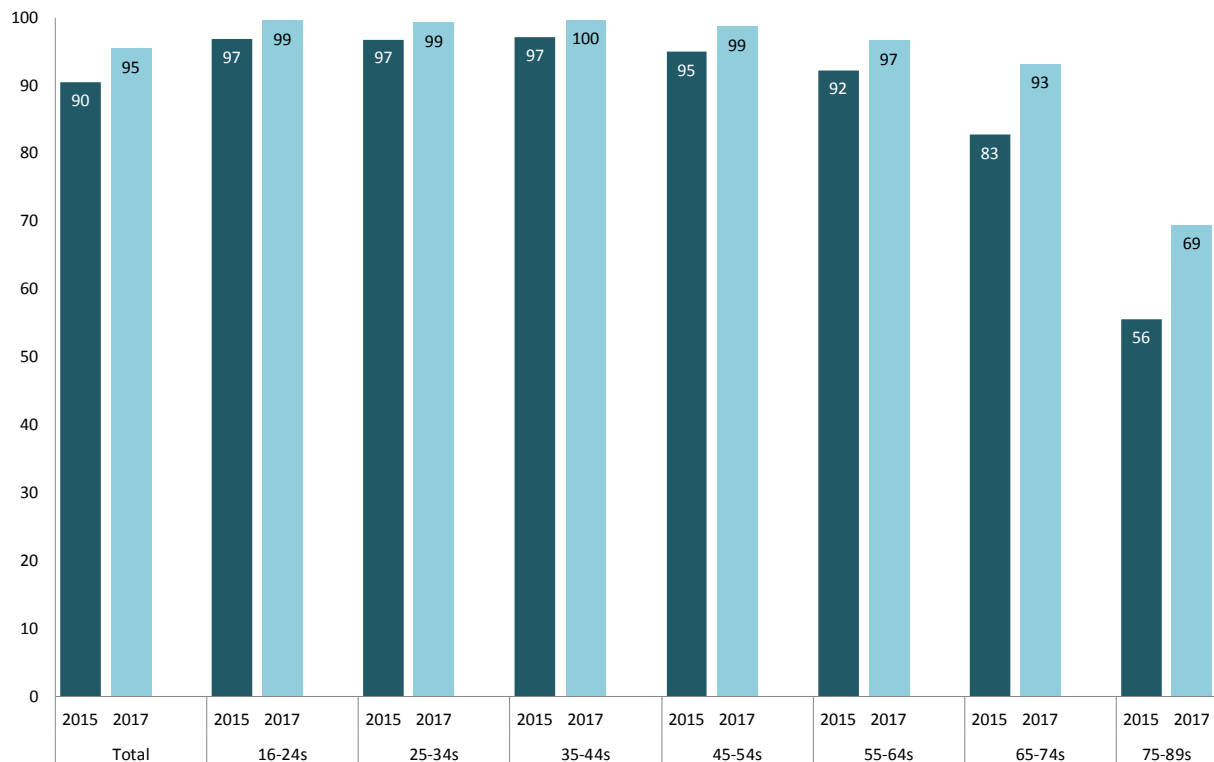
95.4 % of Danes aged 16-89 had access the internet at home on a daily basis in 2017. This is an increase from 90.4 % in 2015.

While increases are recorded in every age group, the largest increases in internet household reach generally are found among the oldest users. Compared with other age groups, there is a markedly larger pick-up in the number of people in the older age groups who have internet access in 2017 compared to 2015

- In 2015, 55.6 % of **75-89s** had access to the internet at home. This share increased in 2017 to 69.4 %, i.e. an increase of 13.8 percentage points.
- In 2015, 82.7 % of **65-74s** had access to the internet at home. This share increased in 2017 to 93.1 %, i.e. an increase of 10.4 percentage points.

For age groups under 55, almost 100 % had access to the internet in 2017.

Figure 2: Percentage share of the Danish population (16-89 years) who have internet access at home. 2015 and 2017 (by age)



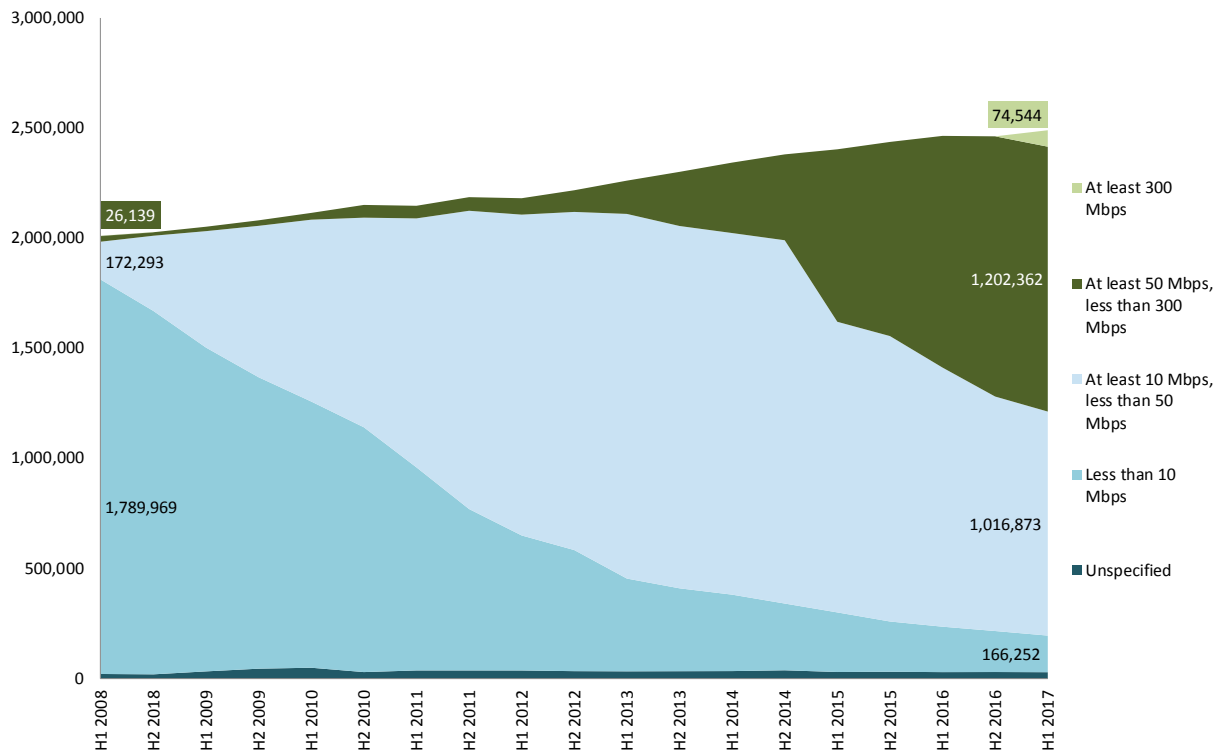
Source: Statistics Denmark – IT use in the population 2014-2017
Data processed by the Danish Agency for Culture and Palaces

Universe: The Danish population aged 16-89

From H1 2008 until H2 2017, the number of broadband subscriptions increased by 23.9 %. For a digital market of this type and over a period of nine years, this is essentially not a large increase. A breakdown of this figure reveals very marked shifts between broadband subscriptions at different speeds:

- Between H1 2008 and H1 2017, there was a sharp increase in the number of broadband subscriptions **with at least 50 Mbps up to less than 300 Mbps** (downstream connectivity) (from 26,139 to 1,202,362 subscriptions).
- For broadband subscriptions **from 10 up to less than 50 Mbps**, there was also a **marked increase** since H1 2008. However, the number of subscriptions in this speed range fell constantly in the period H2 2014 to H1 2017 (from 1,649,059 to 1,016,873 subscriptions). There are still many more than the 172,293 subscriptions in H1 2008 but it is clear that the faster broadband subscriptions are gaining ground at the expense of connections between 10 and 49 Mbps.
- The number of broadband subscriptions with **less than 10 Mbps** downstream connectivity has **fallen by almost 91 %** in the same period.
- In H1 2017, the fastest broadband speeds of **at least 300 Mbps** were recorded for the first time: 74,544 subscriptions.

Figure 3: Internet – Broadband subscriptions, by downstream capacity (marketed speeds)



Source: The Danish Energy Agency – Telecommunication Statistics H1 2017
Data processed by the Danish Agency for Culture and Palaces

3.1.3 Which devices do Danes have in the home, how do they use them to access the internet and how much mobile data do they use?

In general, Danish households had a strong arsenal of computers and similar digital devices at their disposal in 2017. There has been relatively marked development in ownership of several of these devices, even when we look only at the past five years (2013-2017).

91 % of Danish households have a stationary (desktop) pc, a small decline since 2013, when 93 % had a pc (95 % in 2016). 87 % have a laptop computer, which is a larger share than in 2013 (81 %) but smaller than in 2016 (91 %).

Smart phones and smart TVs are two of the devices, for which ownership has grown relatively markedly in the past five years:

- In **2013**, 63 % of Danish households owned a smart phone and 24 % a smart TV
- In **2017**, 84 % of Danish households owned a smart phone and 53 % a smart TV.

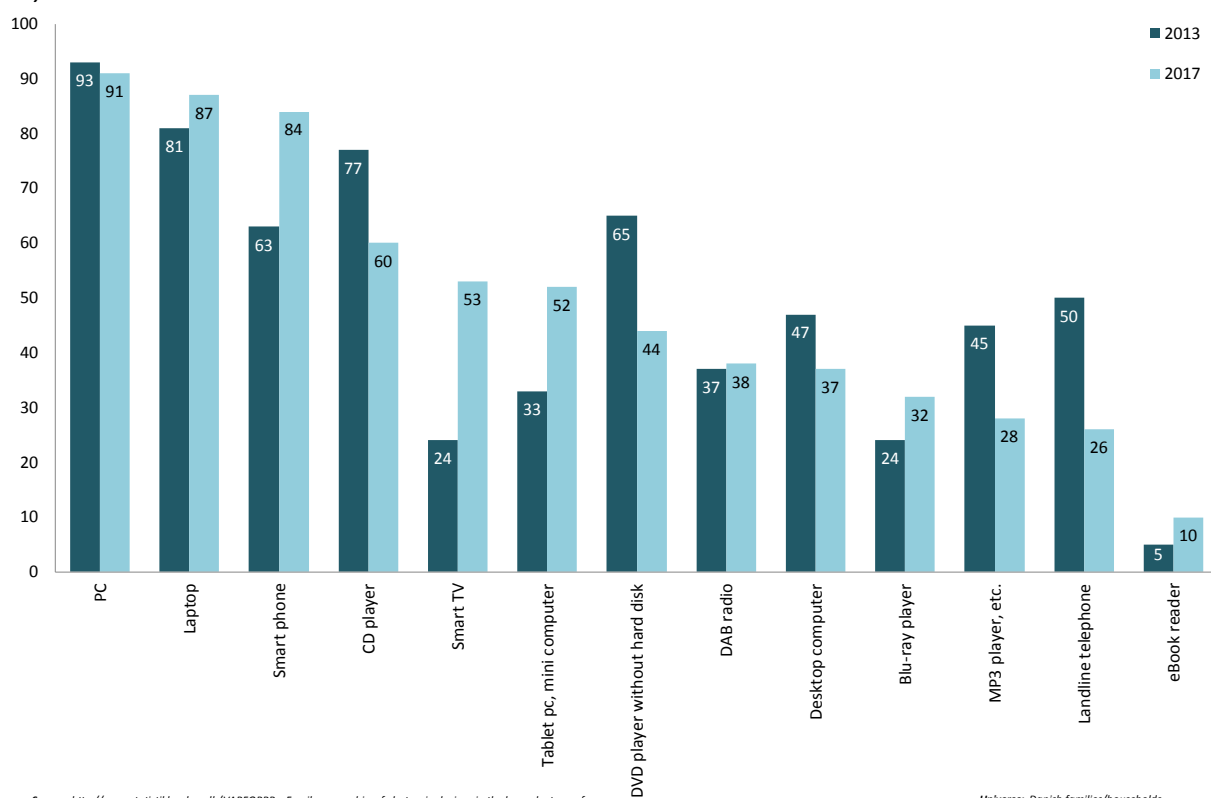
Tablets and minicomputers have also grown strongly since 2013 (33%). In 2017, 52 % of households owned a tablet. However, the share of households owning a tablet has fallen since 2016, when 61 % owned a device of this type.

Figure 4 (below) clearly shows that new types of devices are replacing old ones. There is a tendency for laptops and mobile devices to replace desktop machinery. Devices are also becoming increasingly multifunctional. The smart phone is the most obvious example of a device that is

multifunctional and portable. It now contains functions previously found in “single-function” devices, such as music players (CD and MP3), landline telephones, PCs (desktop computers) and laptop computers, TV and video players, etc.

However, despite increasingly larger screens, the limited size of a smart phone screen is a disadvantage when it comes to viewing TV, video and streaming at home. For these types of viewing, the smart TV, which is also multifunctional, is making relatively rapid inroads into the market.

Figure 4: Family ownership of electronic devices in the home in 2013 and 2017 (selected devices)



Source: <http://www.statistikbanken.dk/VARFORBR>: Family ownership of electronic devices in the home by type of use
Data processed by the Danish Agency for Culture and Palaces

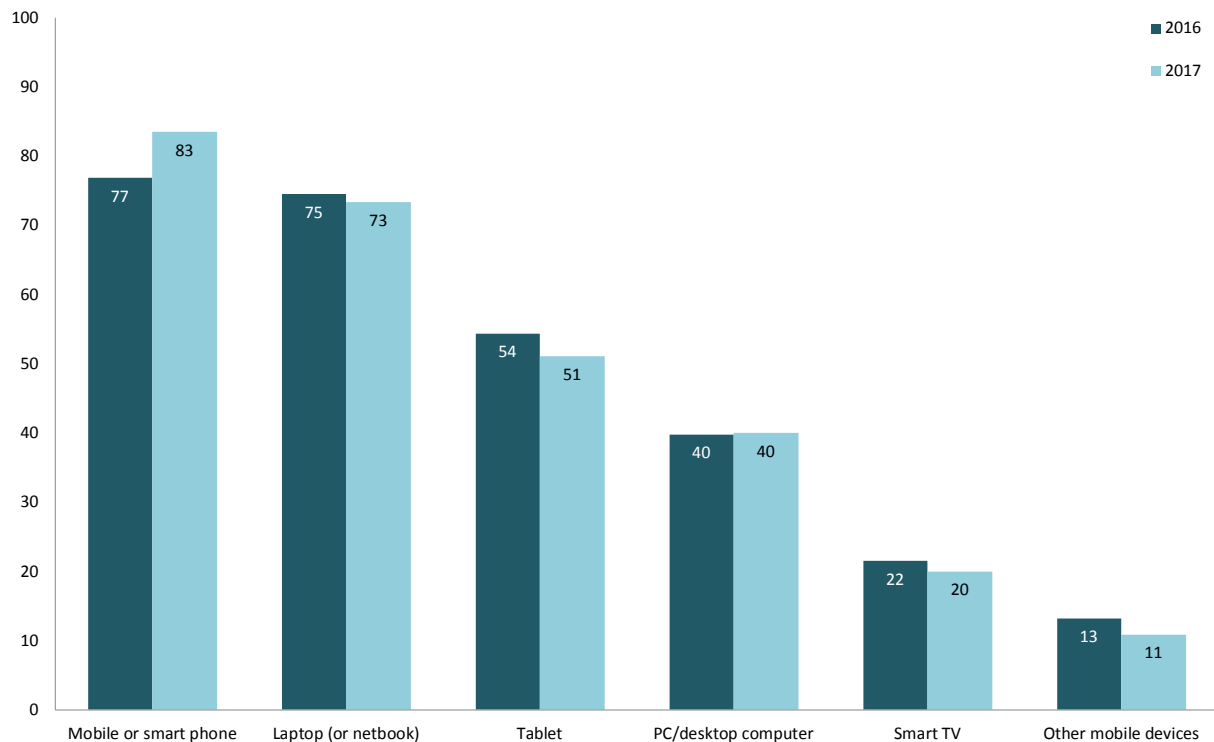
Universe: Danish families/households

In 2017, the smart phone is by far the device most widely used by Danish internet users (16-89s) to access the internet. In 2017, 83.5 % accessed the internet using a smart phone, compared to 76.8 % in 2016, while 73.3 % accessed the internet using a laptop computer/netbook, compared to 74.5 % in 2016. The difference between these two devices in 2017 is 10.2 percentage points.

It seems therefore that the smart phone has taken a big step forward since 2016, where the difference between the two devices was only 2.3 percentage points.

Like the laptop computer, the tablet has lost ground as a device used to access the internet: from 54.4 % in 2016 to 51 % in 2017.

Figure 5: Devices used to access the internet 2016-2017. Percentage share of Danish internet users (aged 16-89)



Source: Statistics Denmark – IT use in the population 2013-2017
Data processed by the Danish Agency for Culture and Palaces

Universe: Danish population aged 16-89 that has used the internet within the last three months

There are marked differences in the types of devices used by the different age groups to access the internet.

In 2017, 97.5 % of internet users aged 16-24 used a smart phone to access the internet. This is the highest share in any age group and an increase of 3.2 percentage points from 94.3 in 2016.

By comparison, only 35.6 % of internet users aged 75-89 used a smart phone to access the internet in 2017. The gap between the youngest and oldest age groups is still very wide. However, in the case of the oldest age group, there is an 11 percentage points increase in just one year. Only 24.6 % of this age group used a smart phone to access the internet in 2016.

For the 65-74s and the 55-64s, there are increases of similar magnitude.

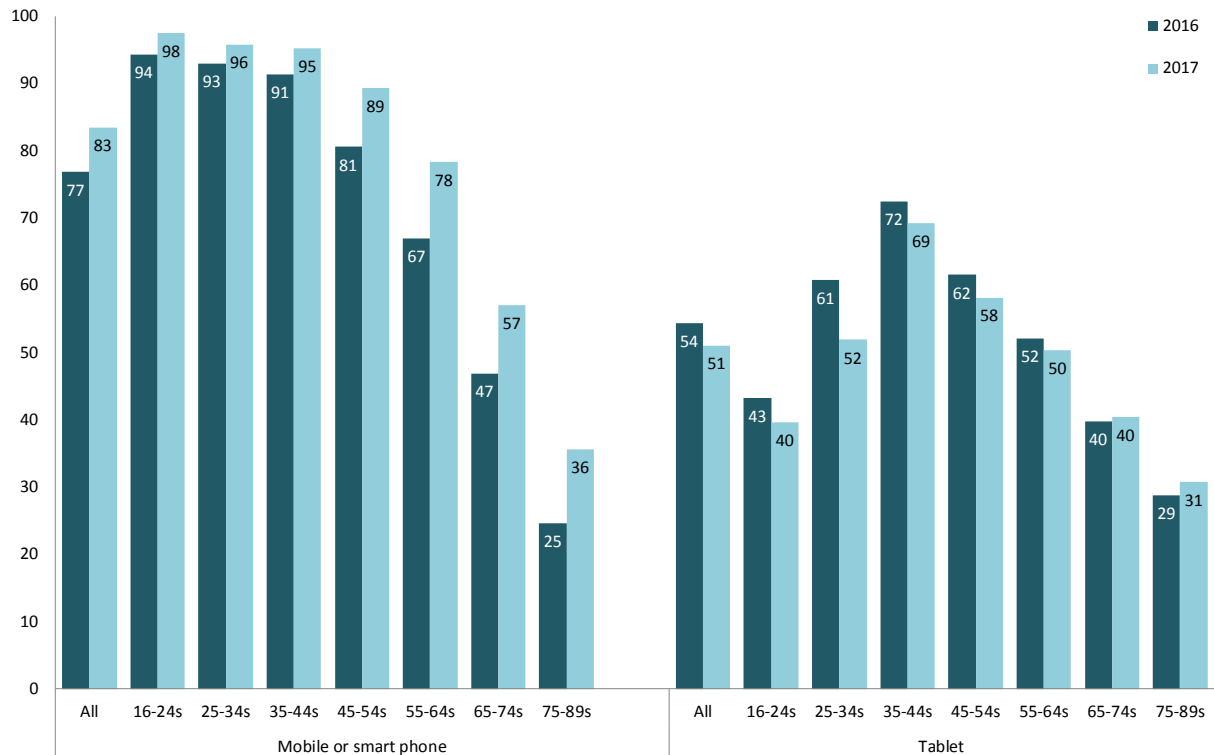
- In 2016, 67 % of 55-64s used a smart phone to access the internet. In 2017, the figure was 78.3 %, an increase of 11.3 percentage points.
- In 2016, 46.9 % of 65-74s used a smart phone to access the internet. In 2017, the figure was 57 %, an increase of 10.1 percentage points.

There remain differences between the age groups but these have shrunk in only a year.

Where using a tablet to access the internet is concerned, the differences between the age groups have also diminished, although the trend differs slightly from that for the smart phone.

While using a smart phone increased in all the age groups (and most among the oldest users), using a tablet fell in all age groups except the two oldest, where there was a modest increase in the use of tablets to access the internet from 2016 to 2017. The largest decline from 2016 to 2017 is seen among the 25-34s: a fall from 60.8 % in 2016 to 51.9 % in 2018 (-8.9 percentage points).

Figure 6: Percentage share of Danish internet users (aged 16-89) that used a mobile/smart phone or tablet to access the internet in 2016 and 2017 (by age)



Source: Statistics Denmark – IT use in the population, 2016 and 2017
Data processed by the Danish Agency for Culture and Palaces

Universe: Danish population aged 16-89 that has used the internet within the last three months

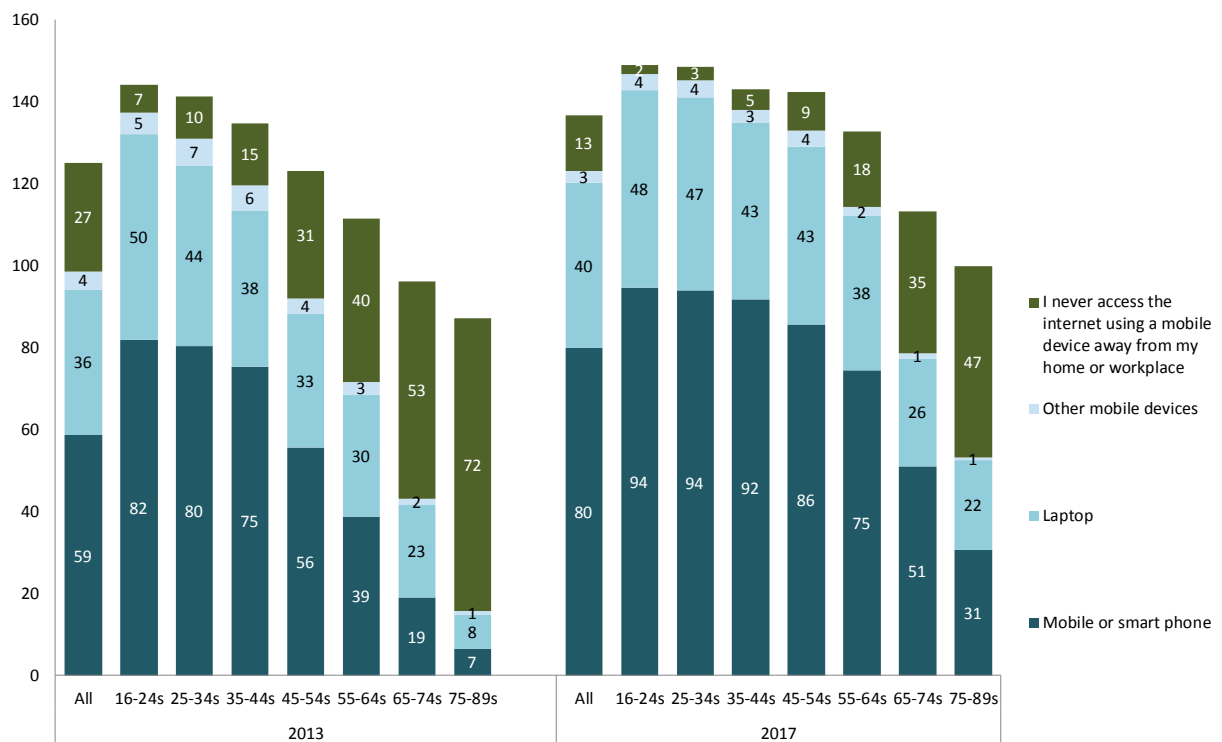
The disparity between the age groups is also evident when it comes to accessing the internet *outside* the home and workplace – although the differences are shrinking all the time. See Figure 78 and figure 8 (below).

Both figures show that the share of internet users who access the internet *outside* the home or workplace via a mobile or smart phone has increased in all age groups from 2013 to 2017 but positive development is clearest among the 45+ age groups.

The largest increase is found among internet users aged 55-64, where 38.9 % used a mobile or smart phone to access the internet in 2013 and 74.6 % in 2017, i.e. an increment of 35.7 percentage points. For internet users aged 65-74, there is an increase of 31.9 percentage points (from 19.1 % to 51 %) and for those aged 45-54, an increase of 30.1 percentage points (from 55.6 % to 85.7 %).

Since 2013, there has been a marked increase (24.2 percentage points) even among the oldest internet users (75-89s). In 2013, only 6.5 % of this age group used a mobile or smart phone to access the internet away from home. In 2017, 30.7 % of them used a smart phone to access the internet “on the fly”.

Figure 7: Percentage share of the Danish population (16–89s) that has used different types of IT devices to access the internet outside the home or workplace – by age. 2013 and 2017



Source: Statistics Denmark – IT use in the population, 2013 and 2017
Data processed by the Danish Agency for Culture and Palaces

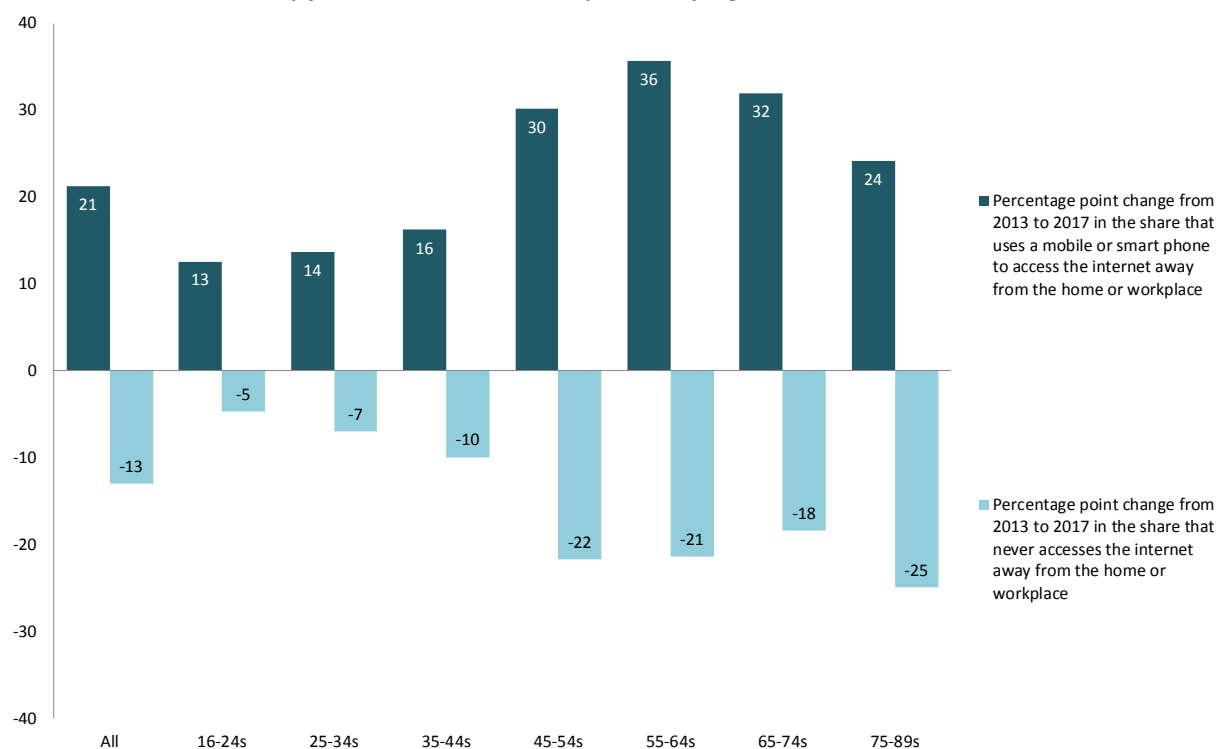
Universe: Danish population aged 16-89 that has used the internet within the last three months

From 2013 to 2017, there is a general fall in the share of internet users who state that they never access the internet outside the home or workplace. In 2013, this share was 26.5 % but it fell to 13.5 % in 2017 (a decline of 13 percentage points).

Once more, the most marked change in the period is observed in the 45+ age groups. They have become much more mobile in 2017 than in 2013:

- In 2013, 71.5 % of **75-89 year old internet users** never used the internet outside the home or workplace. In 2017, this share was 46.6 %, a decline of 24.9 percentage points.
- In 2013, 31.1 % of **45-54 year old internet users** never used the internet outside the home or workplace. In 2017, this share was 9.4 %, a decline of 21.7 percentage points.
- In 2013, 39.8 % of **55-64 year old internet users** never used the internet outside the home or workplace. In 2017, this share was 18.4 %, a decline of 21.4 percentage points.
- In 2013, 53 % of the **65-74 year old internet users** never used the internet outside the home or workplace. In 2017, this share was 34.6 %, a decline of 18.4 percentage points.

Figure 8: Percentage point change from 2013 to 2017 in the share of the population that uses mobile or smart phone to access the internet outside the home or workplace, or who never access the internet away from the home or workplace – by age



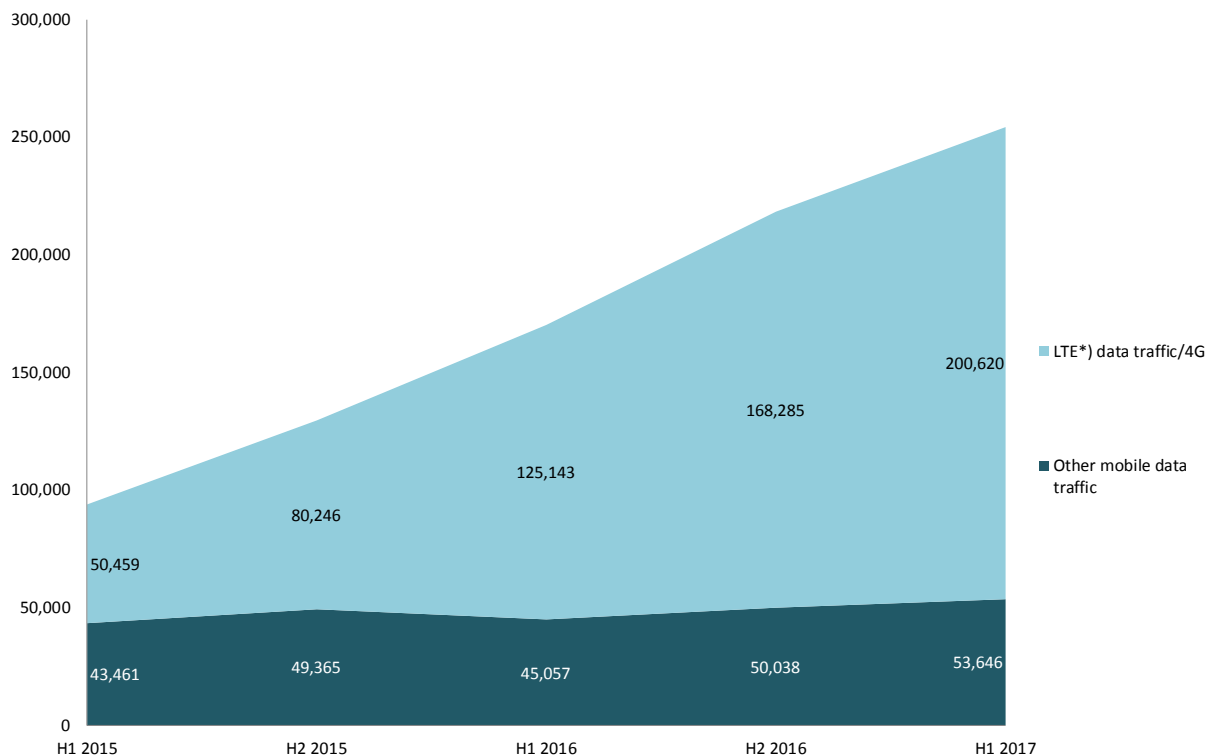
Source: Statistics Denmark – IT use in the population, 2013 and 2017
Data processed by the Danish Agency for Culture and Palaces

Universe: Danish population aged 16-89 that has used the internet within the past three months

The fact that a great many Danish internet users have become mobile, generally and outside the home or workplace, is clearly evident in the growth of mobile data traffic, as shown in Figure 9 below.

In only two years, mobile data traffic has increased by 170.7 %. Data traffic on LTE/4G mobile networks alone increased by 297.6 % from H1 2015 to H1 2017.

Figure 9: Mobile data traffic by broadband type (millions MB)



Source: The Danish Energy Agency – Telecommunications Statistics H1 2017
Data processed by the Danish Agency for Culture and Palaces

*] LTE: Long Term Evolution / 4th generation wireless cellular service

Regarding infrastructure (in the broadest definition of the term), we conclude the following:

- Broadband reach in Denmark is quite high and increasing. This includes ultrafast broadband. However, there are regional divergences.
- Almost all Danes (aged 16-89) have access to the internet from home – and even the oldest age groups keep pace with development, generally and outside the home and workplace.
- The number of internet subscriptions is growing, and internet subscriptions with fast download speeds are largely replacing slower subscriptions.
- As for media-access devices in Danish households, stationary single function devices are being replaced by either portable/mobile and multifunctional devices (smart phone) for use “on the fly” or multifunctional media-access devices for use in the home (i.e. smart TV).
- Generally and outside the home and workplace, the smart phone is the device most often used to access the internet.
- Mobile data traffic is growing fast and reflects the growth in the number of mobile devices in Danish households and their use generally and “on the fly”.

You can learn more about internet access, internet use, devices, streaming and social media use in this chapter of the report: [Chapter on internet use and devices 2018](#).

3.2 From linear to non-linear media consumption

In recent years, the internet and digitization have impacted the ways in which media content is produced, distributed and consumed. New technologies, platforms and trends are surfacing all the time. Each offers new opportunities to produce and consume the media.

3.2.1 From TV to streaming

A trend that has become even clearer in 2017 is the shift from linear to non-linear consumption of audio-visual content. The media world is shifting. In the past, media users fitted their viewing/listening into a schedule predetermined by the media provider. Today's media users are better able to determine where, when and what content they watch/listen to.

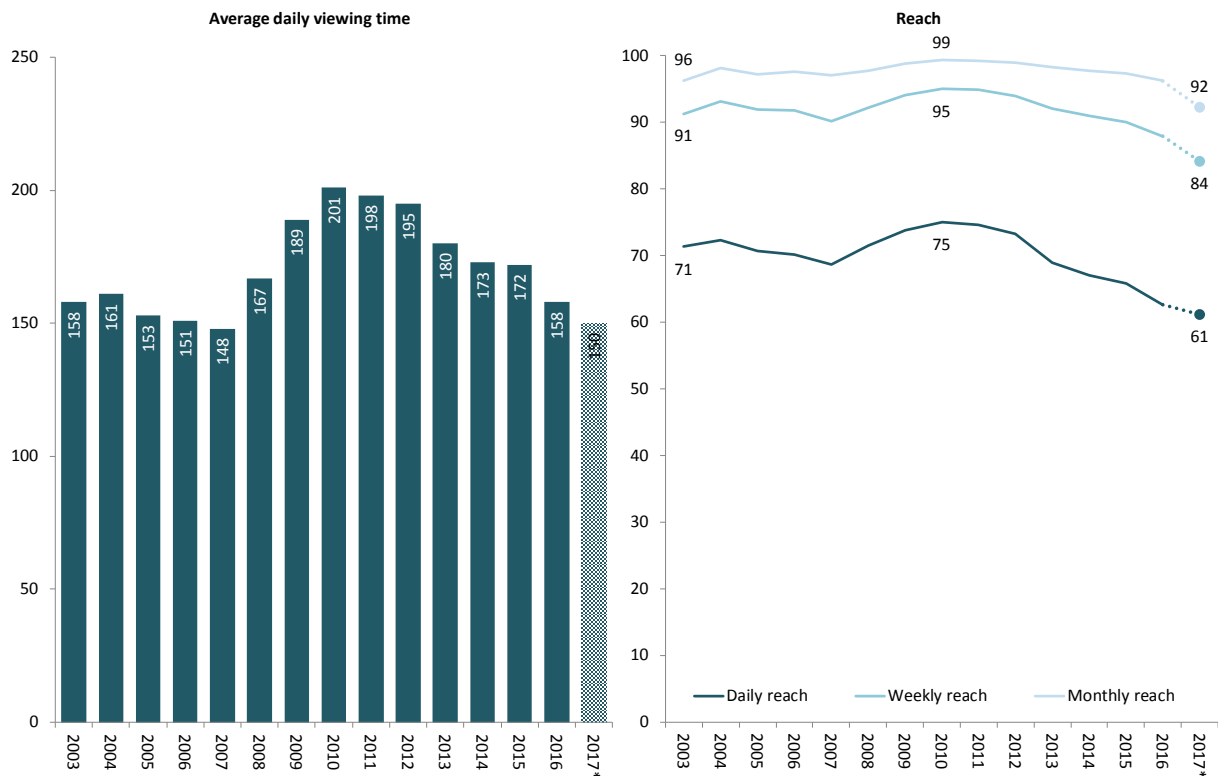
The decline in the use of linear (flow) TV since 2010 continued in 2017. Although a large share of Danes (61 %) continues to watch TV on a daily basis and the vast majority still watches TV weekly (84 %) and monthly (92 %), since 2010 TV as a media has lost reach (share of the population that watches TV) and viewing time.

Some of this development, *specifically* from 2016 to 2017, is probably due to comprehensive changes in the method used by the measuring tool (Kantar Gallup Viewer Survey). The changes in the method mean that pre-2017 figures are not directly comparable with figures after 1 January 2017.¹ Conversely, the method changes do not impact general tendencies for the TV media, i.e. falling daily viewing time and reach.

¹ Up to 2016, the Viewer Survey – then called the TV Meter – was designed as a study of Danish households with TV. From 2017 the survey population is extended to encompass all Danish households. The change means that, while surveys up to and including 2016 charted the TV consumption of Danish households with TV, the 2017 survey charts the TV consumption of all Danish households.

Furthermore, the industry now recognises a new definition of TV viewing. In the past, it was defined solely as LIVE+VOSDAL (i.e. "TV watched LIVE" plus "Viewed On Same Day As Live"). The new definition is LIVE+VOSDAL+TS, i.e. TV watched LIVE" plus "Viewed On Same Day As Live" plus "Time Shifted viewing" (defined as viewing shifted 1-7 days after broadcast).

Figure 10: Average daily viewing time (minutes) and average daily, weekly and monthly reach (%)



Source: Kantar Gallup Viewer Survey
Data processed by the Danish Agency for Culture and Palaces

Universe: The Danish population aged 3+

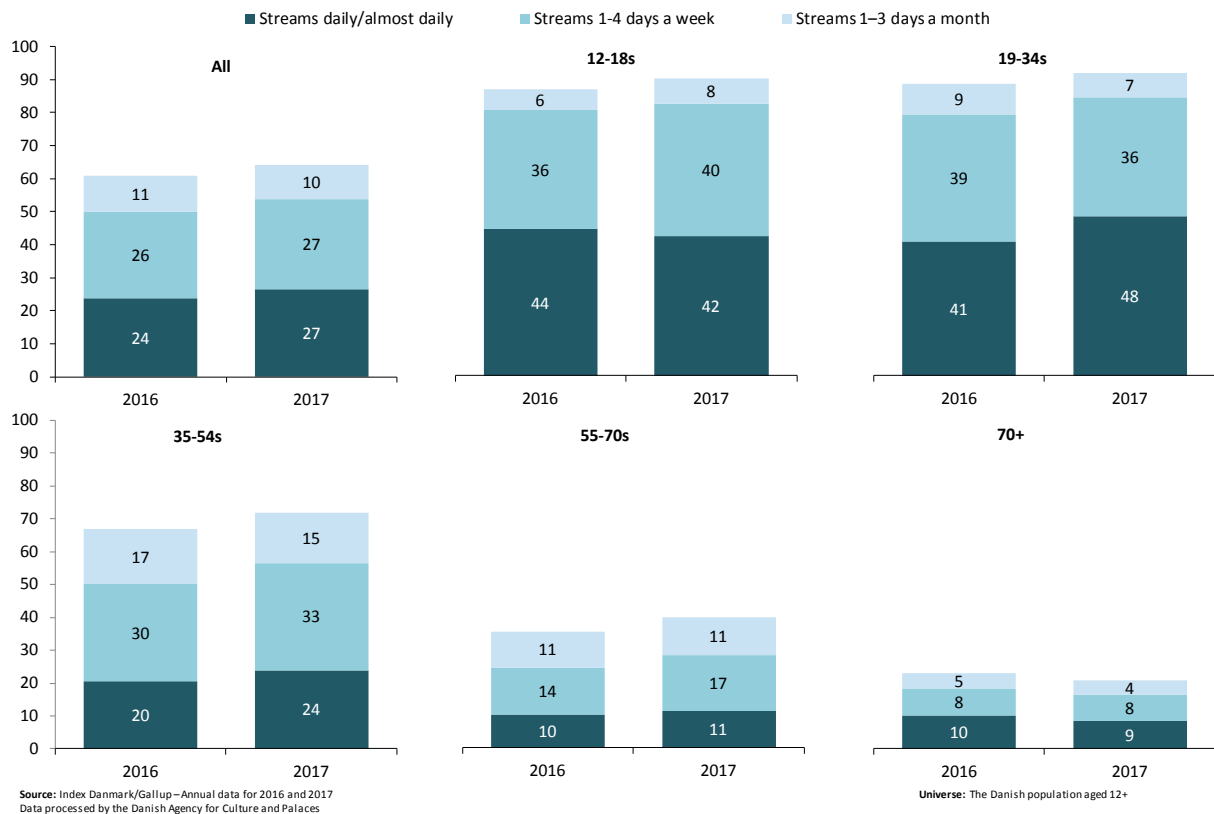
*) Due to the introduction of new methods in the Kantar Gallup Viewer Survey, the figures for TV in 2017 are not directly comparable with previous years' figures. The figures for 2016 are calculated as live + VOSDAL (Viewed On Same Day As Live) while the figures for 2017 are calculated as live + VOSDAL + TS (Time Shifted) – i.e. including any viewing that took place 1-7 days after broadcast. See note 1.

Development is anything but uniform between different segments in the population, and the fall in TV viewing is primarily concentrated on people under 55 years of age. Section 3.3 under(below) and the [Chapter on TV in Report on media development in Denmark 2018](#) illustrate the situation.

Developments in the population's use of streaming to view films, series/programmes, live TV and news contrasts sharply with the developments in conventional TV viewing (described above). "Streaming" does not necessarily mean that content is viewed non-linearly. It is also possible to stream linear TV channels, e.g. via the broadcasters' streaming services or TV distributors' digital services. However, unlike the conventional TV signal, streaming does give viewers an opportunity to view content non-linearly.

Compared with 2016, in 2017 a larger share of the population (aged 12+) streamed at least once a week. This share increased from 50 % in 2016 to 54 % in 2017. Meanwhile, streaming is markedly more widespread in the age groups whose conventional TV viewing has fallen most, i.e. the 12-34s.

Figure 11: Percentage share of the population that streams daily, weekly and monthly. 2016 and 2017



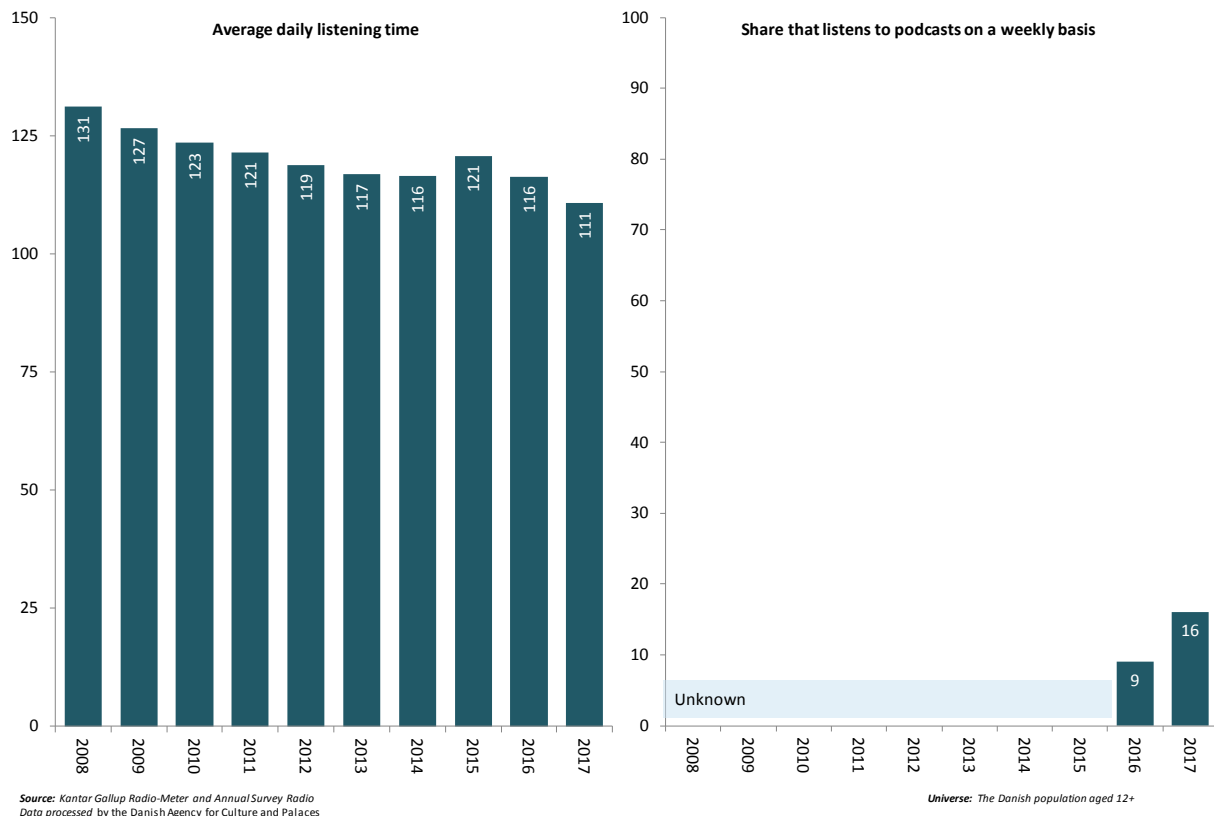
A fall in TV use and concomitant, more widespread use of streaming services – both trends seen primarily in groups under 55 years – heralds a shift away from linear consumption of audio-visual content on flow TV towards non-linear consumption via streaming services.

3.2.2 From radio to podcast

There is a similar development in **radio**. With the exception of a single year (2015), average daily radio listening time has fallen since current industry-approved surveys began in 2008. Radio listening time fell again from 2016 to 2017, from 116 to 111 minutes a day.

However, Danes are increasingly awakening to new opportunities to listen to audio content. In 2016, 9 % listened to podcasts on a weekly basis. In 2017, this share increased to 16 %. This development indicates that podcasts are becoming a regular feature in Danes' media repertoire.

Figure 12: Average daily listening time (minutes) and share that listens to podcasts on a weekly basis



As with TV, it is primarily the younger members of the population that have so far accepted the podcast medium: 17 % of 12-18s, 27 % of 19-34s and 19 % of 35-54s use podcasts on a weekly basis. On the other hand, a mere 8 % of 55-69s and 2 % of the 70+ age group listen to podcasts.

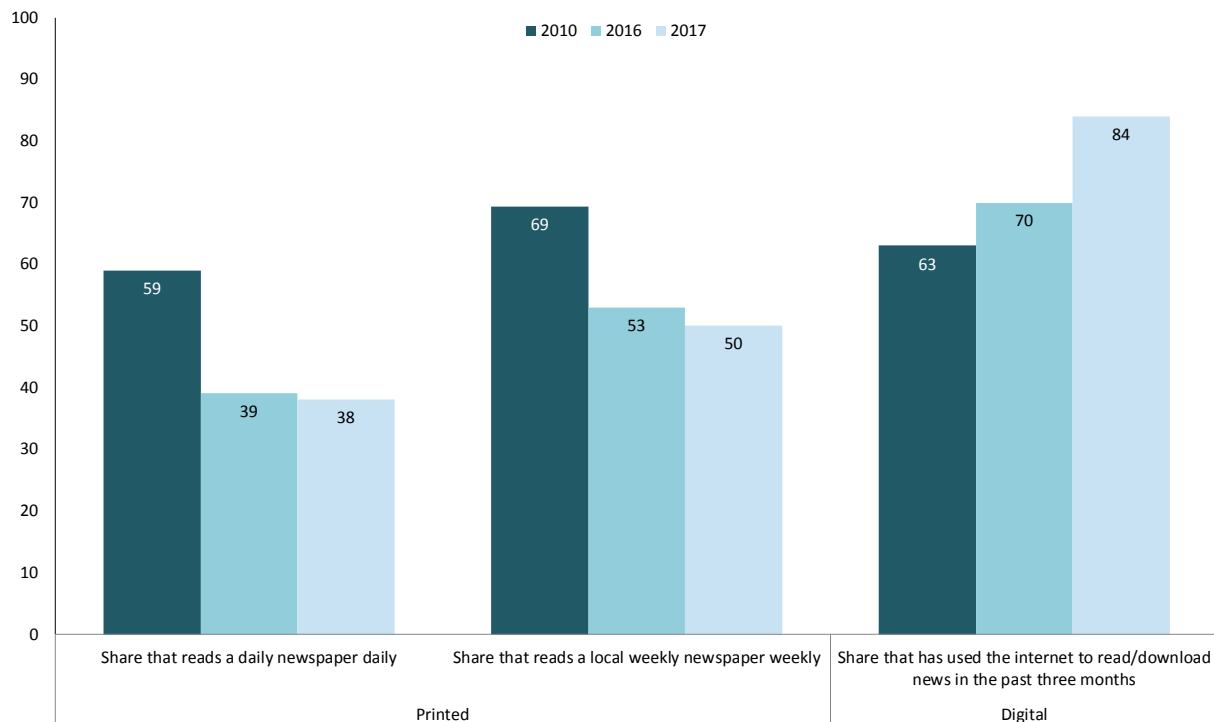
In addition to the increase in the use of podcasting, Statistics Denmark's figures indicate that the share of internet users who used streaming services to listen to music increased from 47 % in 2014 to 60 % in 2017.

3.2.3 From printed to online newspaper

The Danes' use of text media is also switching platform. On TV and radio, some age groups are shifting from a predetermined schedule to a media universe, in which they can choose what to watch/listen to – and where and when to do so.

A similar shift is seen in the use of text media, where the share of people who read a **printed newspaper** – today's deadline for yesterday's news – is dwindling while the share of people who read **text media via the internet** – with constantly changing front page(s) and the latest news – is increasing.

Figure 13: Percentage share that reads daily (daily) and weekly (weekly) newspapers respectively, 2010 and 2017



Source: Index Danmark/Gallup (daily newspapers) Lokal Index Danmark/Gallup (weeklies) and Statistics Denmark – IT use in the population (to read/download news)
Data processed by the Danish Agency for Culture and Palaces

Universe: Danish population 16+ (read/download news) and Danish population 12+ (daily newspapers and weeklies)

In 2017, 1.9 million Danes (aged 12+) read a **daily newspaper** – corresponding to a 38 % share. Even though the fall in this share from 2016 to 2017 is marginal, it is in continuation of a long-term, marked tendency to desert the printed media. In 2010, 2.8 million Danes read a printed newspaper on a daily basis, corresponding to 59 %. This means that daily readership has fallen 21 percentage points, corresponding to about 0.9 million daily newspaper readers.

We see a comparable development for local weekly newspapers, which are (obviously) measured on a weekly basis. In 2017, just over 2.5 million Danes (aged 12+) read a **local weekly** – corresponding to a 50 % share. Since 2010, when 69 % of the population (corresponding to 3.3 million Danes) read a local weekly, the average weekly readership of these publications has fallen by 19 percentage points (about 0.8 million weekly readers).

Based on available sources and surveys, it is not possible to measure Danes' use of internet media on a daily/weekly basis. This would provide the optimal basis for a comparison. Statistics Denmark's "IT use in the population" tells us that, in 2010, 63 % of internet users (aged 16+) had used the internet to access online news/newspapers. In 2017, this share had increased to 84 %. This indicates – ceteris paribus – that the use of the internet to read news is growing.

3.2.4 Summary

Developments for audio (radio and podcasts), visual (TV and streaming) and text (printed newspapers and internet newspapers) content indicate that media users – especially the younger age groups – have accepted the electronic media services and that their consumption of the conventional media is therefore shrinking.

Whereas the conventional media *concomitantly* present *identical content*, the new media offer much more freedom of choice and interaction as media users – to a certain extent – can choose what they wish to watch and listen to – and when to do so.

Some digital media run on algorithms. Algorithms can influence the content, to which the media user is exposed and the content, to which his/her attention is drawn. This is true of Google and Facebook that are increasingly popular gateways to digital news. However, Netflix and a few other news sites are also beginning to function as such gateways.

An increasing share of media consumption is moving from linear to non-linear channels. This shift is driving migration of the flow of content to which the media user is exposed and the extent to which the media user is able to choose what to watch, listen to or read, and when.

3.3 Bigger gap between the light and heavy user

There have always been marked differences regarding *how* and *how much* various groups in the population use the media. Developments over time in different groups of the population are not necessarily parallel. Which group is currently using any given medium or platform most or least at any given time, tends to vary.

One factor that is characteristic for the media year 2017 is that those groups of the population that were already using specific media least, have further reduced their use of the same media most. Light media users are using even less than before. On the other hand, those groups of the population that used a given medium most are those that have increased their use of the same medium (most), i.e. heavy users have either maintained or increased their use.

This development means (*ceteris paribus*) that, in a number of areas, the gap between the users who use a given medium most and those who use the same medium least, has widened.

3.3.1 The TV consumer

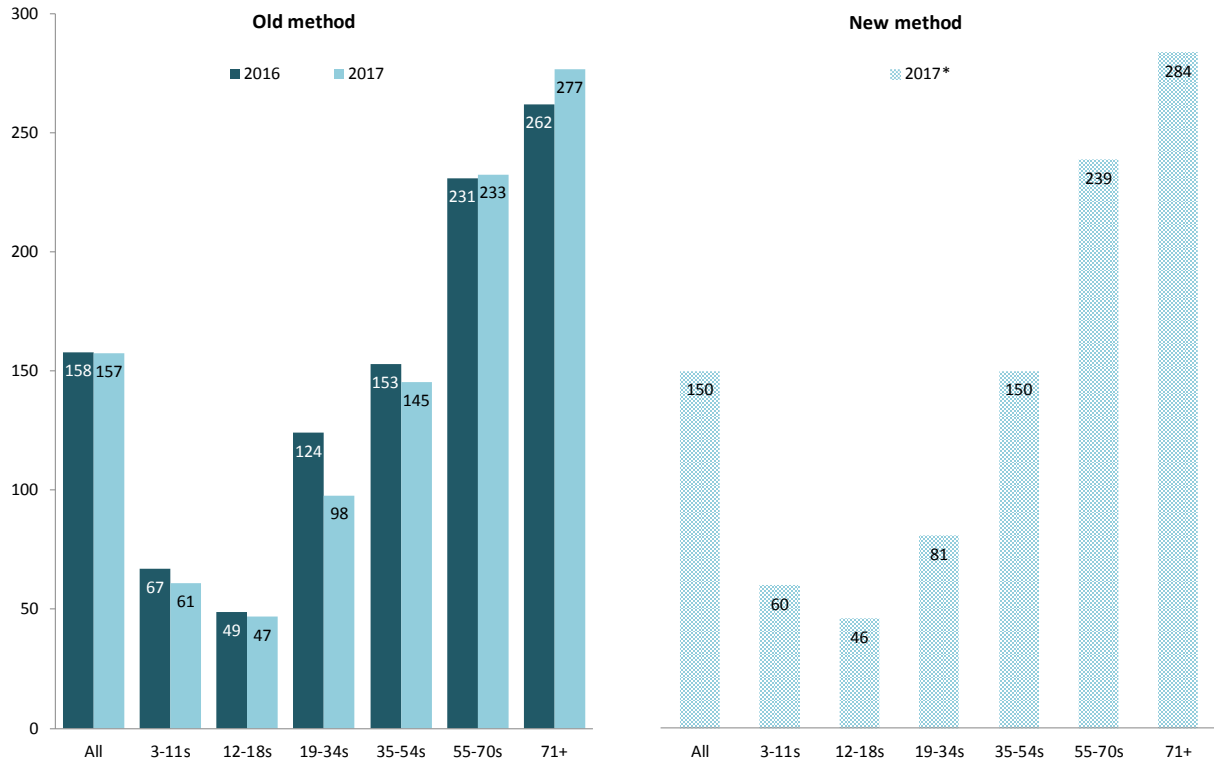
In TV, there is a long-standing trend: the older the viewer, the more time he/she spends watching conventional TV. This is still the case.

The figures from both measuring methods¹ appear in the diagram below.

In recent years, the young have markedly reduced their viewing of conventional TV. From 2016 to 2017, the young are those age groups that have reduced daily TV viewing most (using the old method, i.e. among TV households that view LIVE +VOSDAL). In previous surveys, the old-

est groups largely maintained a stable level of TV viewing. In 2017, their viewing time has increased.

Figure 14: Average daily TV viewing time in minutes, by age. 2016-2017



Source: Kantar Gallup Viewer Survey
Data processed by the Danish Agency for Culture and Palaces

Universe: The Danish population aged 3+

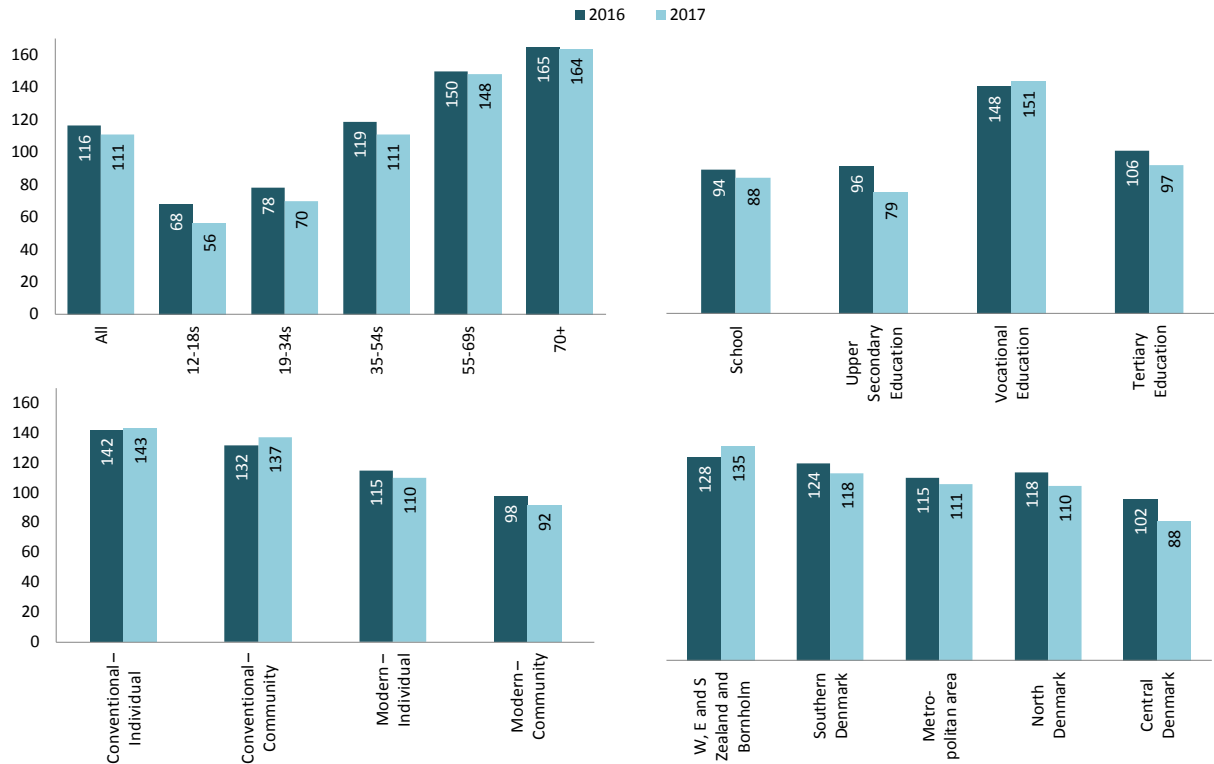
*) Due to the introduction of new methods in the Kantar Gallup Viewer Survey, the figures for TV in 2017 are not directly comparable with previous years' figures. The figures for 2016 are calculated as live + VOSDAL (Viewed On Same Day As Live) while the figures for 2017 are calculated as live + VOSDAL + TS (Time Shifted) – i.e. including any viewing that took place 1-7 days from the time of broadcasting. See note 1 (above).

3.3.2 The radio consumer

Looking at radio, we see that the elderly listen most. This was also true in the past. From 2016 to 2017, all age groups listened less to the radio but, as with TV, the youngest groups have reduced radio listening most, while the reduction in the oldest groups is very modest. This means that the gap between oldest and youngest listeners has widened.

Whether we break the figures down by age or otherwise, the pattern is repeated: the groups that already listened least have reduced listening time by most minutes. Only the groups who listened most have increased daily listening time. The pattern is the same if we break the figures down by geography, education or Gallup Kompas segments.

Figure 15: Average daily listening time in minutes, by age, education, Gallup Kompas segment and geography. 2016-2017

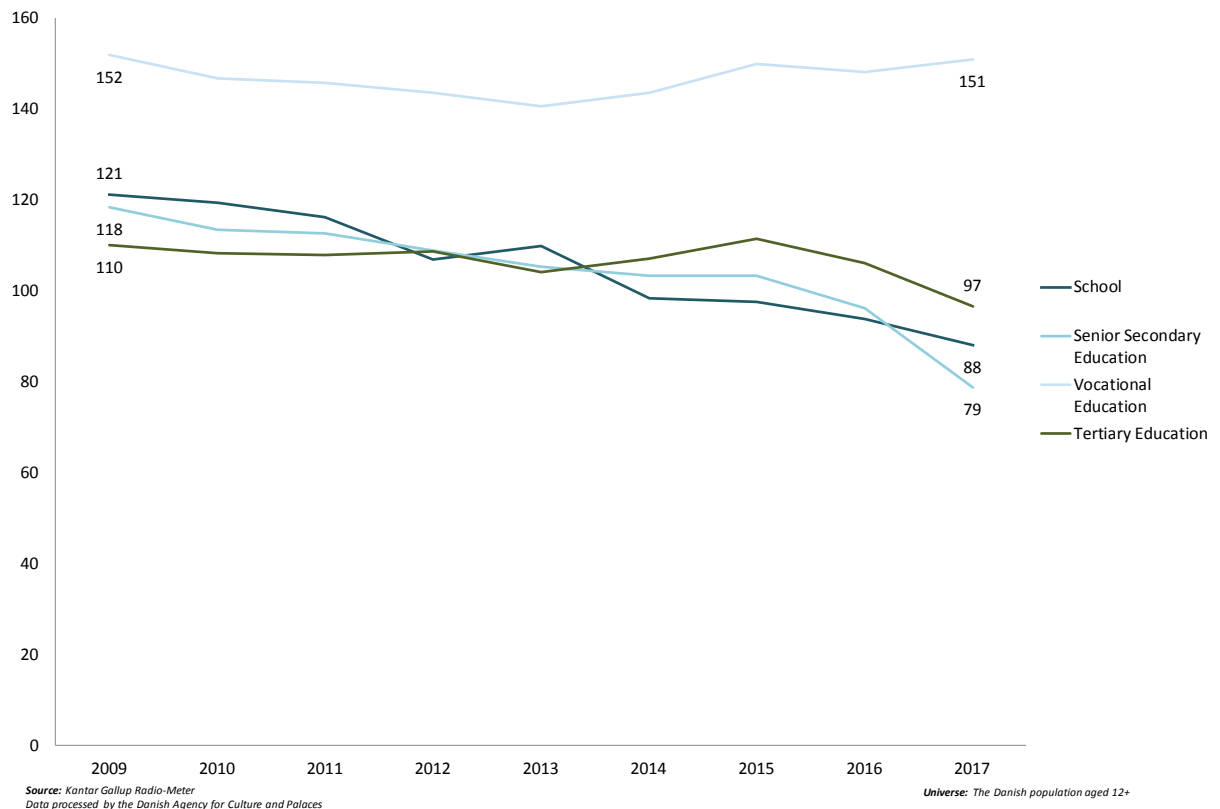


Kilde: Kantar Gallup Radio-Meter
Data processed by the Danish Agency for Culture and Palaces

Universe: The Danish population aged 12+

If we look at radio listening among people with different levels of education, those who have vocational training tend to have much more intensive listening patterns than people with other educational backgrounds. This has not changed since the advent of these surveys. However, from 2016 to 2017, the only group to further increase listening time were those with a vocational training background. Here too, it is true to say that the gap between the time spent by relatively heavy radio users (vocational background) and light users (other educations) widened in 2017.

Figure 16: Average daily listening time in minutes, by education. 2009-2017

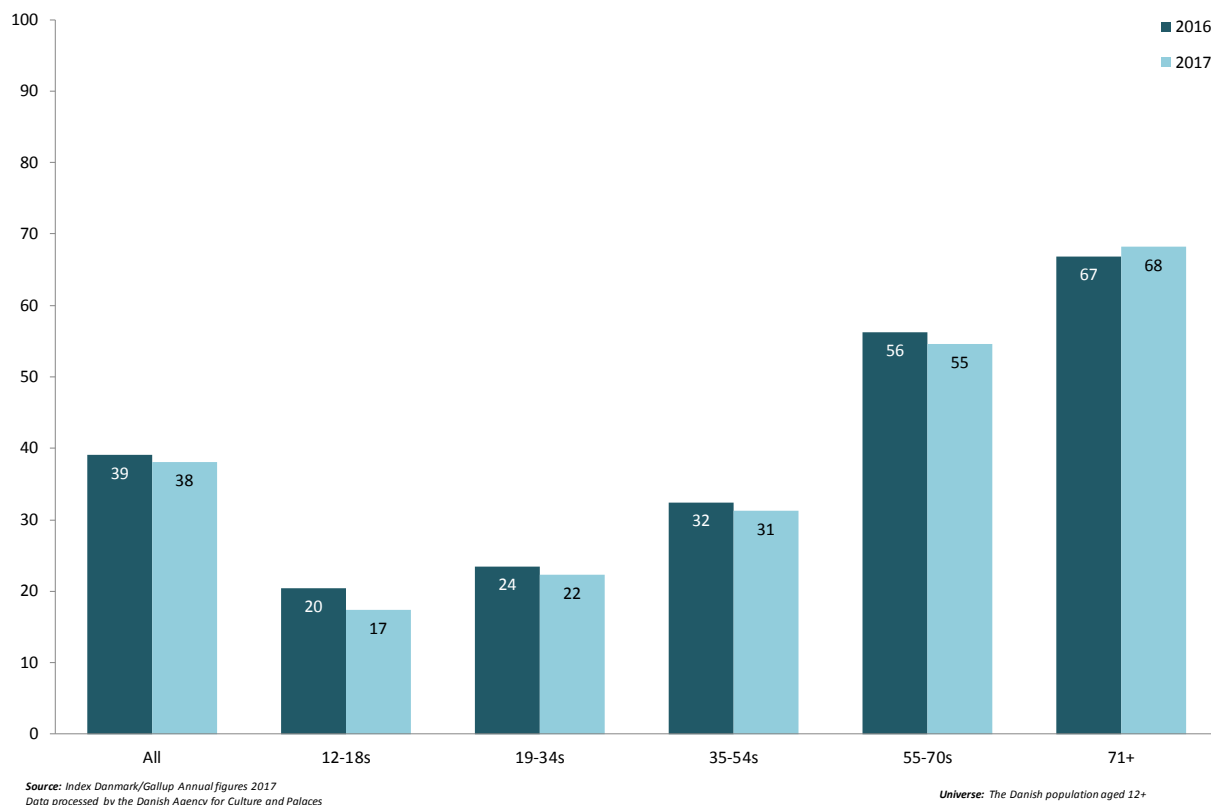


3.3.3 The daily newspaper reader

With regard to the printed media, the largest fall in the share of daily newspaper readers from 2016 to 2017 was recorded for the youngest groups, among whom the share of daily newspaper readers was already lowest.

In 2016, 20.4 % of 12-18s read a daily newspaper. This share fell by 3 percentage points to 17.4 % in 2017. Conversely, among the oldest (aged 71+), the share of daily newspaper readers increased by 1.3 percentage points (from 66.9 % in 2016 to 68.2 % in 2017). Again, the gap between the groups that have the largest and smallest shares respectively, widened further in 2017.

Figure 17: Newspaper reach (%), by age. 2016-2017



3.3.4 Internet use and devices

One of the areas that deviates from the pattern described above for light and heavy users is the Danes' use of the internet and devices. There remains a clear difference between the degree to which younger and older groups use modern (internet-based) technologies. However, the older groups of the population (who did not accept the new technologies and new ways of using the media as rapidly as the younger groups) now tend to increase their use relatively more than the young.

While the differences between different groups' use of the conventional media are, in many ways, increasing all the time, the differences in their use of new media and media technologies is shrinking. The gap is closing in this area due to the fact that, while the young maintain or only slightly increase high use, in time more and more older people are catching up and increasing their consumption at a faster rate of increase than the young's.

This applies, for example, not only to general use of the internet but also to using mobile devices to access the internet, and especially away from home. Furthermore, this applies to the use of the internet to access a range of services, e.g. social network services, reading or downloading news, streaming TV, etc. The gap between light and heavy users is still wide but the effect of the development of these media is increasingly to unite the population rather than to widen generational gaps. Quite the opposite is the case for many of the more conventional media.

3.4 Growth in regional media use

In 2017, it was possible to track progress in the use of the regional media, including printed newspapers, internet websites and TV. For example, readership of several of the major regional dailies' printed publications increased in an otherwise shrinking daily newspaper market. Overall, *Regional dailies* was the only daily newspaper group, for which readership did not fall in 2017.

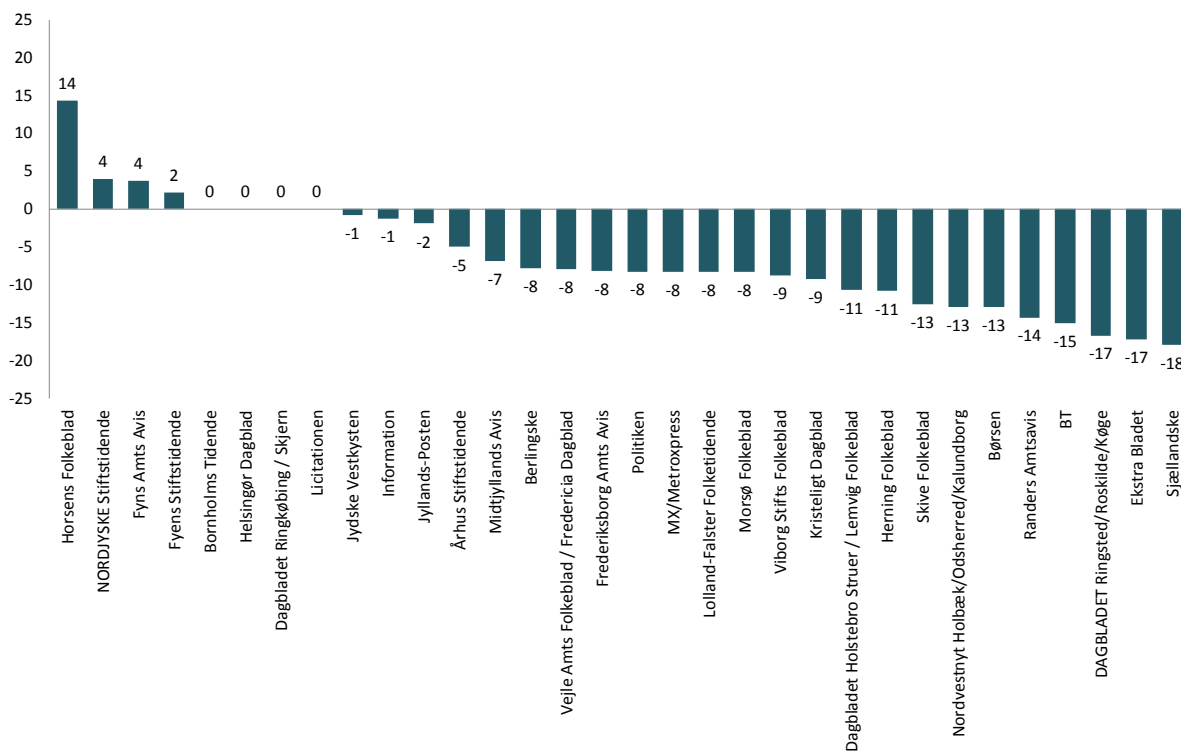
Meanwhile, the number of people using the regional dailies' websites in 2017 grew more than other daily newspapers' websites². Finally, in 2017, TV 2 regional stations' round-the-clock channels' share of total TV viewing increased slightly.

In 2017, among the dailies' **printed publications** (including e-newspapers), there were four that increased readership and a further four that maintained status quo. Seven of the eight publications that either increased readership or maintained status quo were *regional dailies* or *provincial dailies*. A relatively minor daily, Horsens Folkeblad, enjoyed most growth, 14 %.

More markedly, larger publications – including NORDJYSKE Stiftstidende, Fyns Amts Avis, Fyens Stiftstidende, Jydske Vestkysten and Århus Stiftstidende – are listed as dailies whose readership increased, maintained status quo or fell very slightly compared to the majority of Danish daily newspapers.

² NB: Among others, eb.dk, politiken.dk and jp.dk (all owned by JP/Politikens Hus) were not included in the survey until December 2017, and are therefore not included in the survey.

Figure 18: Percentage change in readership – Dailies/newspapers from 2016 to 2017



Source: Index Danmark/Gallup – Annual data 2010, 2016 and 2017
Data processed by the Danish Agency for Culture and Palaces

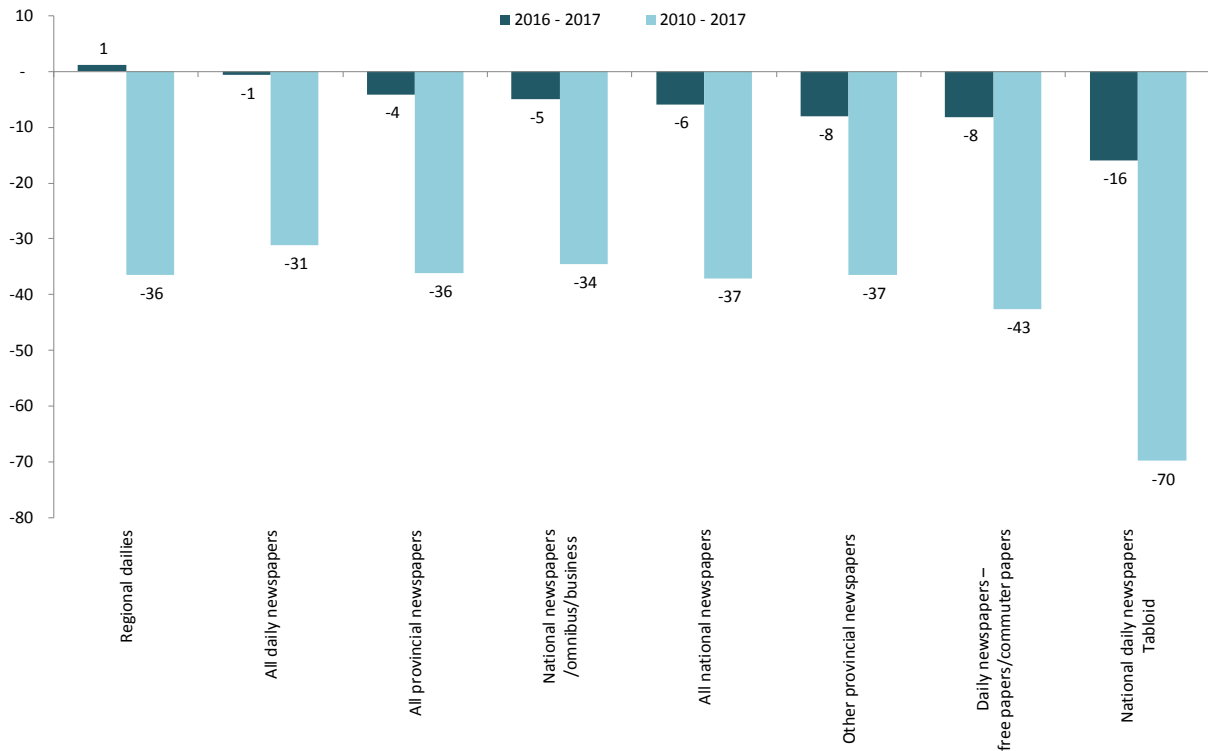
Universe: The Danish population aged 12+

In the "Report on media development in Denmark 2018", daily newspapers are categorised in eight groups. One of these, *All provincial dailies* includes *Regional dailies* (major publications: Århus Stiftstidende, Fyens Stiftstidende, Jydske Vestkysten, Nordjyske Stiftstidende) and *Other provincial dailies* (all other provincial daily newspapers).

When measuring all eight groups of daily newspapers, the only group with a growing readership is *Regional dailies*. Readership grew 1 % from 2016 to 2017.

The increase in the readership of *Regional dailies* from 2016 to 2017 is interesting because it flies in the face of a marked general decline in all daily newspaper groups' readership from 2010 to 2017 (see Figure 19) – including a decline in *Regional dailies*.

Figure 19: Average daily readership – daily newspaper groups – percentage change from 2016 to 2017 and from 2010 to 2017



Source: Index Danmark/Gallup – Annual data 2010, 2016 and 2017
Data processed by the Danish Agency for Culture and Palaces

Universe: The Danish population aged 12+

Readership of a number of (particularly the small) *provincial dailies* has fallen in recent years. The figure (above) shows that all of these are in the *Other provincial dailies* group, whose readership fell by 8 % from 2016 to 2017. Of these, readership shrunk most at Sjællandske, DAGBLADET Ringsted/Roskilde/Køge, Randers Amts Avis, Nordvestnyt, Skive Folkeblad, Herning Folkeblad and Dagbladet Holstebro-Struer, all of whom lost 10 % or more of their readers from 2016 to 2017.

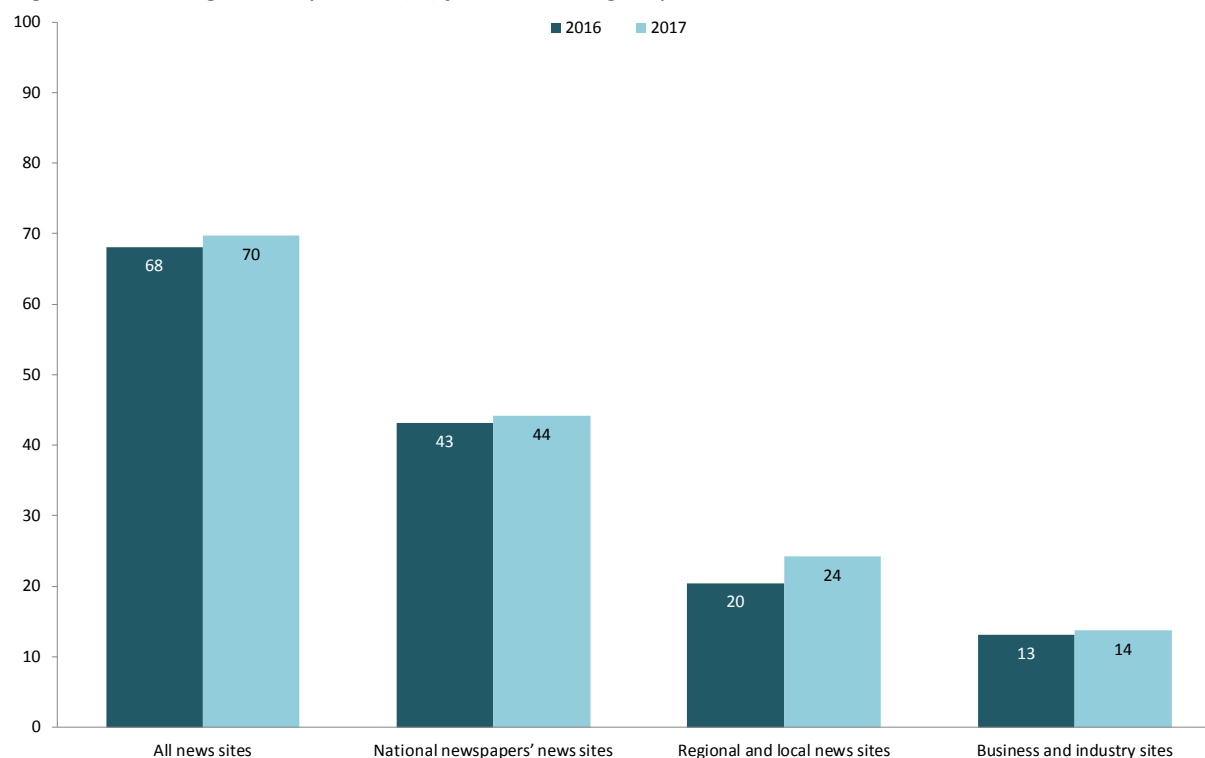
While there are generally fewer of us who read printed daily newspapers, there is a clear increase in the share of Danes that reads the news on the internet. The share of internet users (16-89s) who read online news/newspapers on the internet increased from 71 % in 2016 to 85 % in 2017 (Source: Statistics Denmark – IT use in the population).

This development is also reflected in the use of local and regional news sites that increased markedly in 2017 (even by comparison with other news sites). From 2016 to 2017, average weekly reach for regional and local news sites³ increased from 20 % to 24 %.

³ amtsavisen.dk, aoh.dk, aoib.dk, aok.dk, dagbladet-holstebro-struer.dk, dagbladetningskjern.dk, folkebladetlemvig.dk, folketidende.dk, frdb.dk, fyens.dk, fyn.dk, helsingordagblad.dk, hsf.dk, jv.dk, minby.dk, mja.dk, nordjyske.dk, sn.dk, stiften.dk, ugeavisen.dk, vafo.dk, vdonline.dk and viborgfolkeblad.dk

An increase of 4 percentage points here is much larger than the development in *National dailies' news sites* and *Business and industry sites* (both have increased by 1 percentage point) and the *All news sites* group (that has increased by 2 percentage points).

Figure 20: Average weekly reach (%) for news site groups in Dansk Online Index



Source: Dansk Online Index/Kantar Gallup
Data processed by the Danish Agency for Culture and Palaces

Universe: Danish internet users aged 7+

Among the daily newspapers' news sites, readership of news sites associated with regional dailies increased most in 2017 (measured on the average number of weekly users). See figure 21 below.

The five daily newspaper news sites that achieved most growth in the average number of weekly users in 2017 (among sites measured in Dansk Online Index) are all associated with regional dailies. Readership of four of these five (stiften.dk, nordjyske.dk, jv.dk and sn.dk) increased by more than 30 %. Readership of the fifth, fyens.dk, increased by 24 %.

The increases in readership for the largest daily newspaper news sites measured were more modest: business.dk (22 %), tv2.dk (13 %), bt.dk (11 %), dr.dk (5 %) and b.dk (3 %).

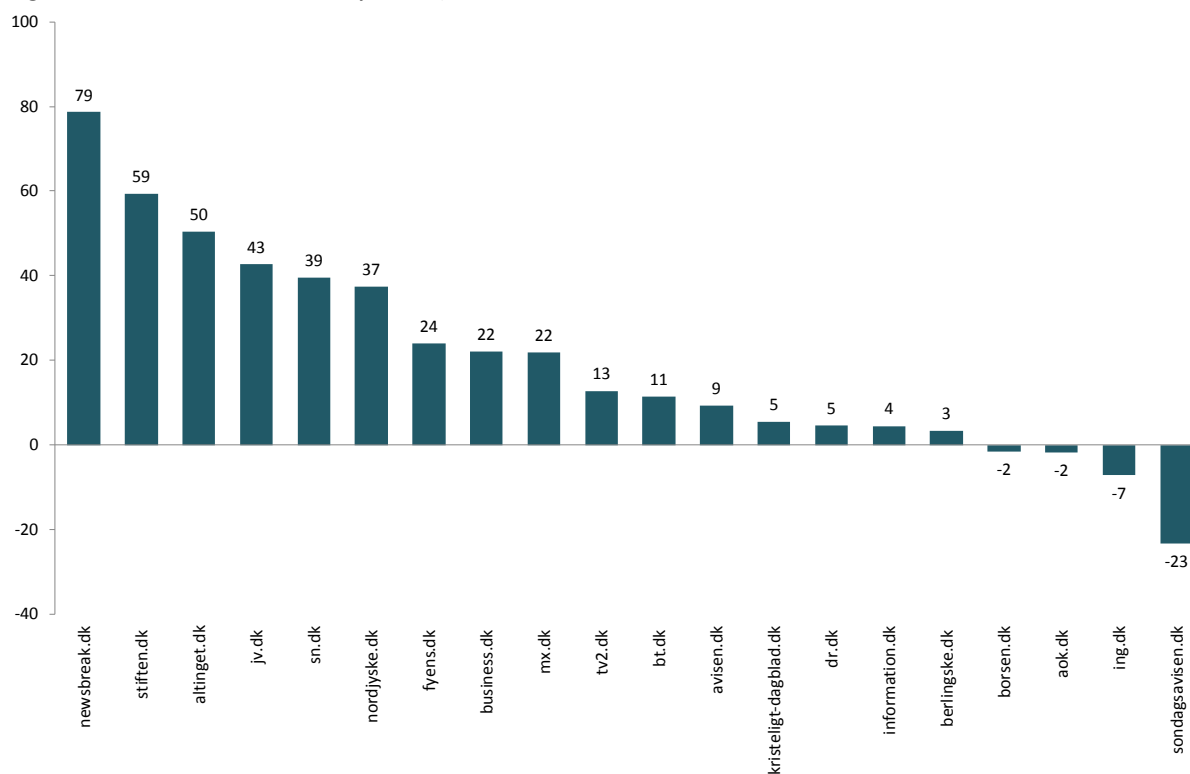
Two of the five daily newspaper news sites with most growth are also associated with dailies, for whose printed publication readership also increased.

- Readership of the printed version of NORDJYSKE Stiftstidende increased by 4 % in 2017 and the number of average weekly users of their news site increased by 37 % in the same period.

- Fyns Amts Avis and Fyens Stiftstidende increased print readership by 4 % and 2 % respectively in 2017, while the average number of weekly users of their common news site, fyens.dk, increased by 24 % in the same period.

Conversely, the average number of weekly users of sn.dk (a shared news site run by Sjællandske Medier’s daily and local weekly newspapers) grew by 39 % in 2017, whereas readership of the company’s four daily printed newspapers fell by 8 % or more.

Figure 21: Development in average no. of weekly users from 2016-2017 (% , all platforms, 20 largest news sites, measured by users)

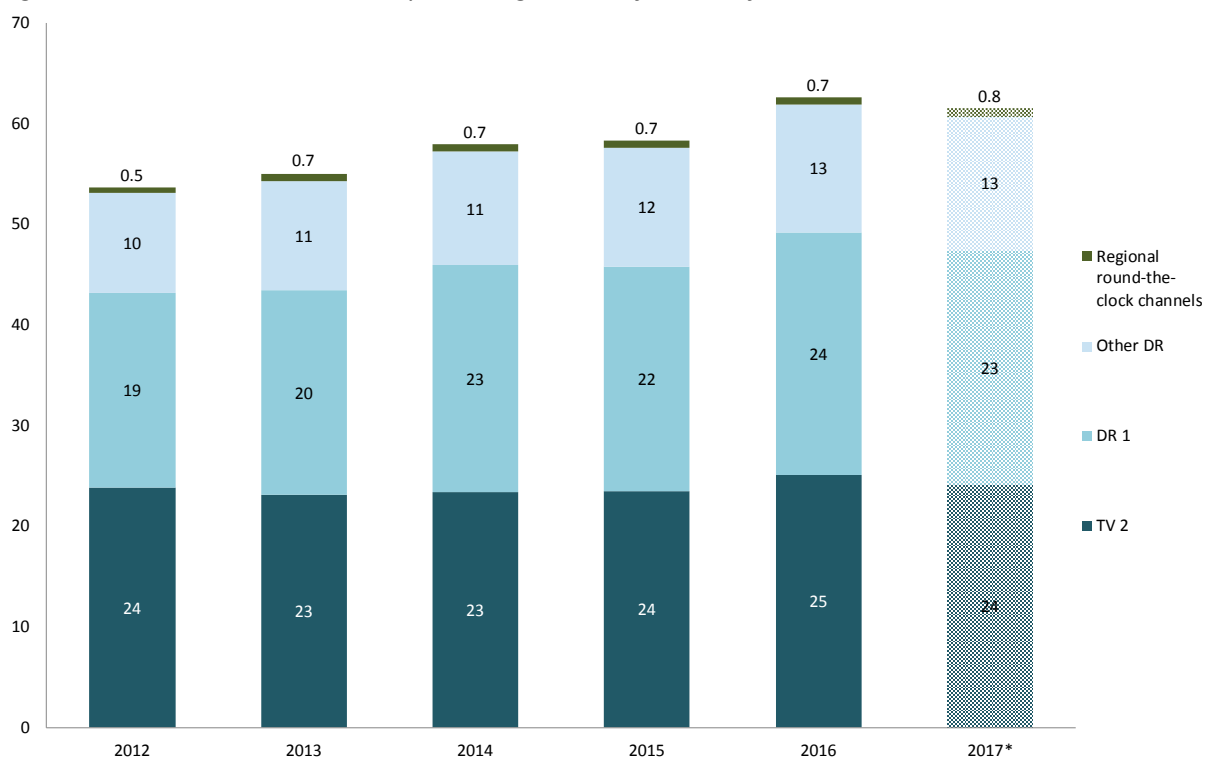


Source: Dansk Online Index/Kantar Gallup
Data processed by the Danish Agency for Culture and Palaces

Universe: Danish internet users aged 7+.

While there are many regional and local text media, the regional TV 2 stations are the only major regional and local players on **the TV market**. The regional TV 2 stations’ round-the-clock channels increased their share of total TV viewing from 0.7 % in 2016 to 0.8 % in 2017 (corresponding to an increase of 0.1 of a percentage point). The regional TV 2 stations’ round-the-clock channels were founded in 2012. Since their inception, their share of total TV viewing has increased by 0.3 of a percentage point.

Figure 22: Public service channels' percentage share of viewers from 2012-2017



Source: Kantar Gallup Viewer Survey
Data processed by the Danish Agency for Culture and Palaces

Universe: The Danish population aged 3+

The development of the regional media (not including the regional TV 2 stations) can be seen in the light of a tendency to consolidate that has affected the market for daily (general) and local weekly newspapers in recent years. For example, Berlingske Media's disinvestment in regional daily (general) and local weekly newspapers has driven further consolidation of such publications under the wings of major regional newspaper companies, as major players acquired more or less all the disinvested media.

A case in point is Jysk Fynske Medier (annual revenue MDKK 1.860 in 2017). With 13 dailies and 57 local weeklies, Jysk Fynske Medier is now Denmark's second-largest newspaper group (after JP/Politikens Hus).

Table 2: Daily newspaper groups' annual revenue 2017 (MDKK)

Group	Revenue 2017 (MDKK)
JP/Politikens Hus	2,755
Jysk Fynske Medier	1,860
Berlingske Media	1,100
Nordjyske Medier	865
Sjællandske Medier	491
Dagbladet Børsen	314
Kristeligt Dagblad	128
Information	119

Source: The groups' annual accounts

Compared to individual publications, the regional newspaper groups, including Nordjyske Medier (especially NORDJYSKE Stiftstidende) and Sjællandske Medier (e.g. DAGBLADET Ringsted/Roskilde/Køge, Frederiksborg Amts Avis and Sjællandske), can achieve synergy between their publications.

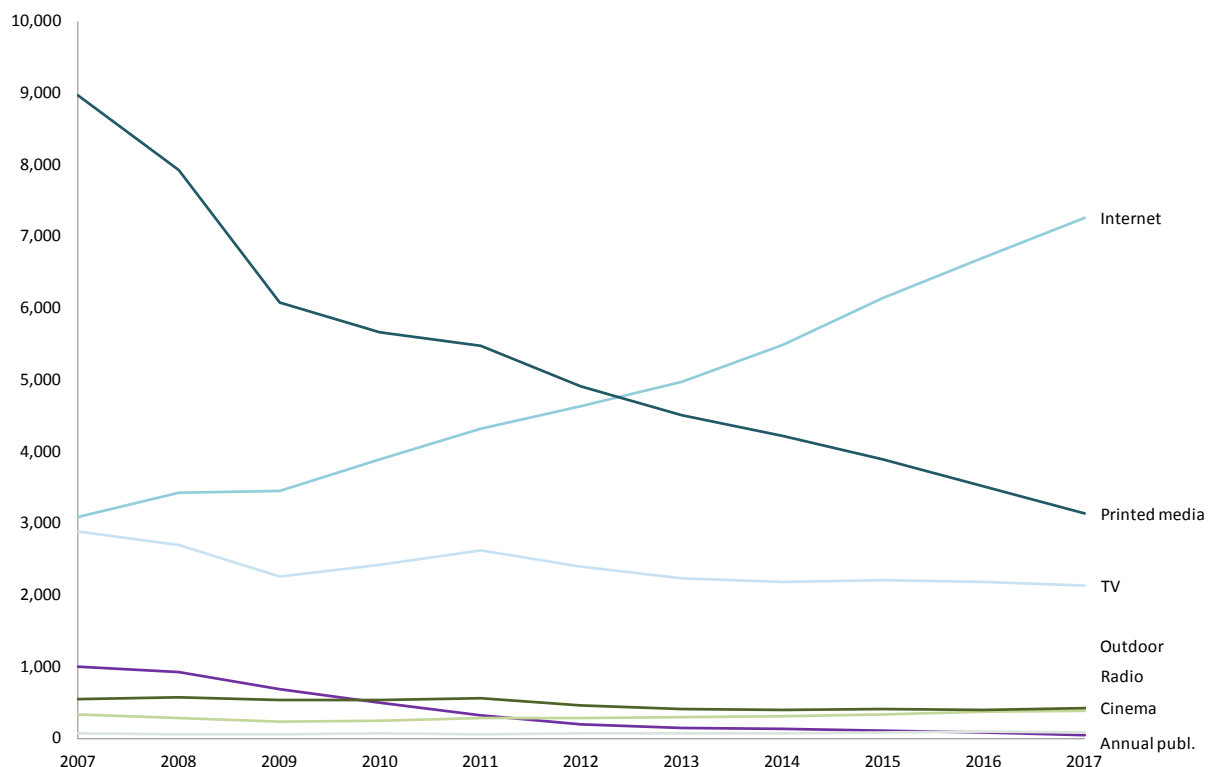
The regional newspaper groups publish dailies, local weeklies and news sites, in which much of the design and content is repeated and supplemented with regional and locally adapted content.

Similarly, several of the regional newspaper groups' news sites include one or more dailies and these are often supplemented with content trawled from a large number of local weeklies. For example, Sjællandske Medier's news site, sn.dk, encompasses four dailies (with their respective e-newspapers) and the content of the group's local weeklies.

3.5 Advertising revenue in Denmark and to foreign players

Total advertising revenue in Denmark increased by MDKK 127 in 2017: from MDKK 13.320 in 2016 to MDKK 13.447 in 2017. The advertising market continues to grow. However, as in previous years, market shares are shifting between the different media groups.

Figure 23: Advertising revenue by media group and time (MDKK at 2015 prices)



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

Universe: Advertising products in the Advertising Consumption Survey

The most obvious trends in 2017 are the continued drastic fall in advertising revenue in the **printed media** and the corresponding persistently strong growth in advertising revenue on **the internet**.

Seen over a longer period, advertising revenue in all media groups (except radio, cinema and the internet) has fallen. Advertising revenue has fallen most in the **printed media** group, i.e. by DKK 5.8 billion. If we discount the **internet** for a moment, the media groups overall have lost DKK 7.6 billion in advertising revenue since 2007. **Advertising revenue on the internet** increased by DKK 4.2 billion in the same period. This is therefore the predominant growth factor on the Danish advertising market.

Table 3: Advertising revenue by media group and time (MDKK at 2015 prices)

	MDKK	2007	2016	2017	2007-16	2016-17
Printed media		8,960	3,507	3,132	-5,828	-375
Annual publications		1,002	81	44	-958	-36
Posters and traffic/Outdoor		543	396	416	-127	20
TV		2,889	2,177	2,129	-759	-48
Radio		327	370	383	55	13
Cinema		64	91	87	22	-4
Internet		3,086	6,698	7,255	4,169	558
Ad revenue in total		16,871	13,320	13,447	-3,425	127

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

Internet development has many nuances. Growth is unevenly distributed between internet advertising products – display, web TV, search words, etc. This helps to explain why internet advertising growth has largely gone to foreign rather than Danish companies because the foreign companies play many of the key roles in digital advertising.

A special report "[Globalisation of the Danish media industry](#)" prepared by Mandag Morgen (a media company and think-tank) for the Danish Agency for Culture and Palaces describes how foreign technological companies – chiefly Google and Facebook – play key roles in the Danish media industry's digital value chain. On the strength of these key roles, the foreign players are winning large shares of Danish advertising revenue.

Table 4: Advertising revenue on the internet by media group and time (MDKK at 2015 prices)

	2009	2016	2017	2016-2017	Share of growth since:	
	MDKK	MDKK	MDKK	MDKK	2016-17	2009-17
Search words	1,169	3,008	3,303	295	53 %	56 %
Display (ex web TV from 2106)	1,102	1,930	2,134	204	37 %	27 %
Marketplaces	1,018	1,213	1,206	-7	-1 %	5 %
Display on web TV (from 2106)	0	265	321	56	10 %	8 %
Permission marketing	140	257	257	0	0 %	3 %
Others	21	24	34	10	2 %	0 %
Internet total	3,450	6,698	7,255	558	100 %	100 %

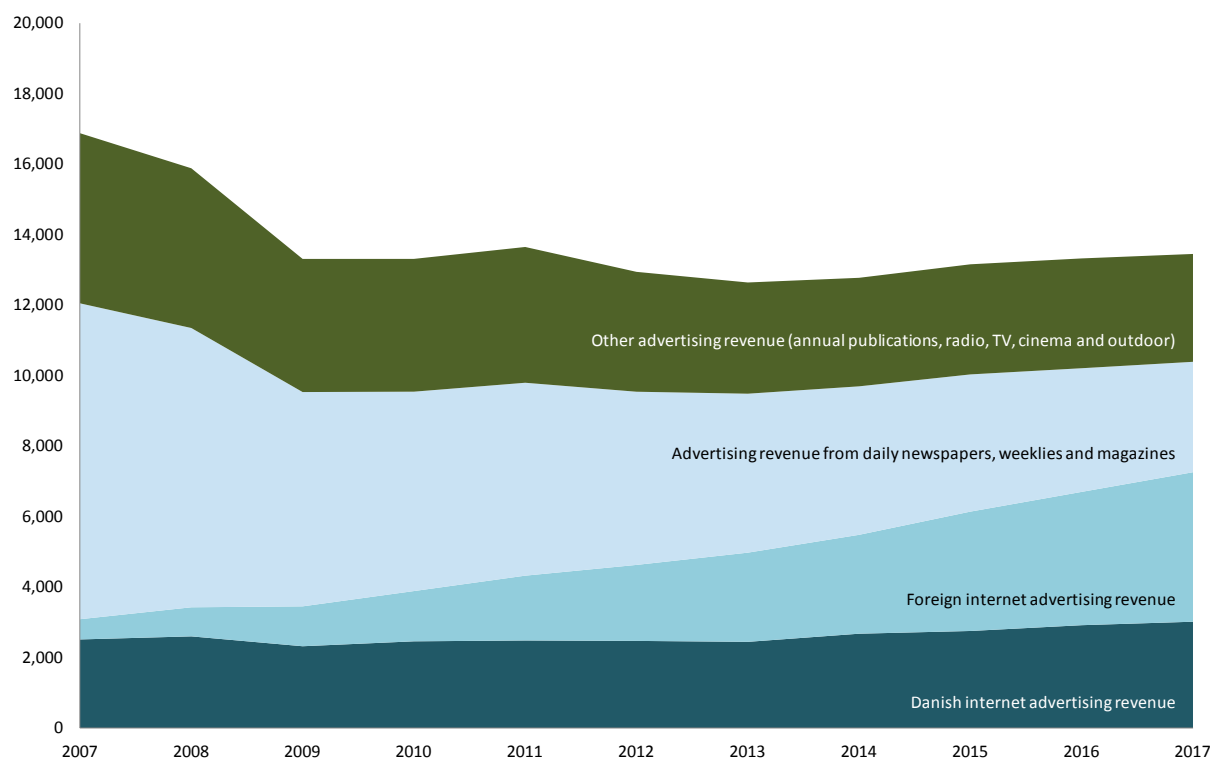
Source: Danske Medier Research for the Danish Agency for Culture and Palaces, own calculations. Data processed by the Danish Agency for Culture and Palaces.

Total growth from 2016 to 2017 was MDKK 558. Of this growth, **search words** (that are advertising mainly on Google (owned by Alphabet)) account for more than 50%. Classic **display advertising**, for a share of which a great many major and minor players are currently jostling, accounted for 37 % of growth while web TV (specified separately for the first time in 2016) accounted for 10 % of growth from 2016 to 2017. You Tube is assumed to swallow much web TV revenue. Both Google and YouTube are owned by Alphabet. **Marketplaces** accounted for 1 % of growth, **permission marketing** for 0 % and **other advertising revenue** for 2 %.

The pattern is identical in the longer perspective. Compared to 2009 – i.e. the first year, in which internet revenue was broken down by product type – **search words** have accounted for an unrivalled majority share of growth (56 %), followed by **display** (27 %), **web TV** (8 %), **marketplaces** (5 %), **permission marketing** (3 %) and **other internet advertising** (0 %).

Development in 2017 showed that Danish companies profited from only 18 % of total growth on the internet. Foreign players coined the remaining 82 %. The pattern has not changed since 2007: Danish companies profited from 12 % of internet growth while foreign players profited from 88 % of growth. Google and Facebook were particularly strong foreign players. They have coined 74 % and 24 %, respectively, of internet advertising revenue since 2007. The trend is unequivocal: the internet – and therefore the foreign players – have conquered a large share of the Danish advertising market.

Figure 24: Danish advertising market revenue. Internet advertising revenue by Danish and foreign companies, advertising revenue from daily newspapers, weeklies and magazines, and other advertising revenue (MDKK at 2015 prices)



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

Universe: Advertising products in the Advertising Consumption Survey

In a hypothetical example, in which the printed media accounted for all growth in Danish internet advertising revenue since 2007, the printed media would have earned a MDKK 503 revenue increase. However, this would not come close to covering advertising lost on their printed products, amounting to MDKK 6,786. In the past decade, the industry has reacted to the market situation by implementing a wave of mergers, redundancies, cutbacks, etc.

4 This year's special reports

In the past year, two special reports were published as part of the Danish Agency for Culture and Palaces' "Report on media development in Denmark". The main conclusions of this year's special reports are presented here.

4.1 Globalisation of the Danish media industry

[The report](#) illustrates how in recent decades the Danish media market has become more strongly affected by and dependent on foreign companies that increasingly determine the conditions under which Danish media companies produce and distribute content to Danish media consumers, and how this content is commercialised. The report also describes how the Danish media companies face huge challenges in the competition to win Danish consumers' loyalty.



The report's main conclusion is that in 2017 Danish media companies are manifestly no longer capable of determining the technological, distributive or commercial standards they use when they provide Danish content to Danish media consumers. Global players now determine – and continually change – these standards, and Danish media companies no longer have the final say regarding important parts of their own commercial value chain.

In a section entitled **Technological upheaval and new players**, the report describes how **three types of players exert an influence on market development in Denmark**: Social media (e.g. Facebook), streaming services (e.g. Netflix) and technology conglomerates, like Apple and Google.

- These players' burgeoning presence has caused **the dissolution of the Danish media companies' value chain**. This is explained not least by the fact that news production requires a great number of partners, all of whom add and extract resources. A Danish media product from a private media company involves on average **102 partners**.
- Google is particularly predominant in the so-called **invisible streams of data** between companies.

In a chapter entitled **Economic displacement and the search for new business models**, the report illustrates the importance of international players for media advertising revenue and the market for subscription-based media content.

- Today's digital advertising market is **bipolar, i.e. dominated by Google and Facebook**. These two players coin more or less all growth (an estimated 75-90 % at the global level) in the online market.

- Danish media companies' **dependency on Google and Facebook is increasing** because none has the capacity to compete with the innovative drive and raise the capital needed to invest in development.
- The TV advertising market is in the throes of **disruption**, as indeed other parts of the media industry were disrupted in the past. For example, Facebook, Google, Amazon and Netflix are ready to pounce on the advertising potential on streaming TV and file-sharing services.

Upheavals in distribution and new journalistic processes describes how international technology companies, and especially the social media, **influence Danish news media content** and how content is produced and distributed. For example, Danish media companies rely heavily on Facebook as a distribution channel and use the social media as a journalistic source. Meanwhile, **the invisible hand of the algorithm** has become a new production criterion.

4.2 Spending and prices

How much money do Danes spend on the media and media-related products? How is the distribution of media spending between e.g. newspapers, mobile phones, internet, TV and books developing over time? And what impact do recent trends, such as streaming and combi-subscriptions, have on spending? These are some of the issues addressed in ["Spending and prices"](#).



In 2016, the average Dane's annual media-related spending amounted to DKK 19.626 (2016 prices). This is DKK 116 more than in 2015. The figure is still somewhat lower than the hitherto highest annual spending figure, DKK 25,049, measured in 2007. However, there have been many marked shifts in media spending.

- There are growing differences between spending on the written media and spending on audio-visual media. **Households' annual spending on the written media almost halved from DKK 4,147 in 2006 to DKK 2,279 in 2016.** Conversely, spending on audio-visual media, including streaming services, has increased (to DKK 275 in 2016).
- Telecommunications services account for an ever-increasing share of media spending. Telecommunications services including so-called combi-teleservices (i.e. combining telephony with internet or TV) accounted for **35 % of households' media-related spending** in 2016.

There is a marked trend for tele- and TV providers increasingly to **include third-party services in their products**. For example, YouSee customers can compile a subscription that includes up to 10 third-party services. Telia and Plenti each offer eight, and Stofa and Telmore seven optional extra services. Examples of optional extra services are TV 2 Play, Zetland and HBO.

The report also describes differences in spending based on demography and geography. For example, in 2016, media spending in households in urban municipalities amounted on average to DKK 20,241, which is **DKK 3,526 or 21 % more than in provincial municipalities**.

Finally, based on price indices (that take into account fluctuations in prices, quantities and quality), the report describes how content media (e.g. TV and newspaper subscriptions) have become relatively more costly whereas teleservices (especially mobile telephony and the internet) have become relatively cheaper.

4.3 News bulletin surveys

In the past year, the organisation behind the "Report on media development in Denmark 2018"," has published two news bulletin (Kort Nyt) surveys, the main conclusions of which are presented here.



4.3.1 News bulletin: Streaming

In the [News bulletin Streaming services](#) survey, the Danish Agency for Culture and Palaces focused on the Danes' consumption and use of streaming services, and substantiated appreciable growth in international streaming services' content budgets.

In 2016, the average Danish household paid DKK 276 p.a. *directly* to film and streaming services. *Indirect payment* for such services is probably higher as many subscribe to streaming services, e.g. HBO, via their telephone, TV and internet subscriptions. This means that film and streaming services continue to be only a relatively minor item of consumer expenditure compared to other media items, e.g. TV subscriptions, on which the average household spent DKK 2,514 in 2016.

There are vast differences in how much different types of households spend on film and streaming services. For example, in 2016, households comprising two adults with children spent DKK 446 p.a., whereas households with two adults and no children, where the person with the household's highest income was aged 60+, spent DKK 175.

The survey also shows that the 25-29s and the 30-34s are most likely to pay to stream film and music on the internet. 52 % of the 25-29s pay for streaming services compared to an average of 29 % among the 16-89s. Only 10% of the 60-64 % pay for streaming services.

The survey also focused on the differences between Danish TV providers and international streaming services' respective content budgets, especially budget growth rates:

- **Netflix has tripled its content budget since 2014:** From DKK 21.6 billion in 2014 to DKK 44.9 billion in 2017. In the same period, DR and TV 2's content budgets changed very little.

- A growing number of subscribers may account for much of the growth in Netflix' content budgets. However, **Netflix' cost of content per subscriber** has increased from DKK 34.6 a month in 2015 to DKK 39.5 in 2017. Cost increases should be seen in the light of Netflix' revenue that continues to grow year after year. Netflix can afford to invest more in content and improve profits at the same time.
- Other players' (e.g. Amazon Prime and HBO) budgets are increasing. Others still, including Apple and Facebook, are planning to launch streaming services of their own.

4.3.2 News bulletin: The social media

The [News bulletin](#) survey: [Use of the social media in 2017](#) describes a clear trend, in which social media users in increasing numbers are becoming active on an increasing number of social media platforms. This trend appears to have changed in 2017: the number of Danish social media users that settle for using a just one social medium has grown.

The share of social media users that settled for using just one social medium increased from 28 % in 2016 to 37 % in 2017 – an increase of 9 percentage points. Meanwhile, the share of people who use two or more than three social media fell in 2017.

Facebook continues to be the Danes' favourite social medium. **Of users who use only one social medium, 91 % used Facebook;** followed by LinkedIn (4 %), Snapchat (2 %), and Instagram, Twitter and WhatsApp (1 % each). This is explained partly by the fact that Facebook consistently integrates new functions that are actually the primary objectives of the other social media (including, in future, streaming services).

The principal observations of the survey are:

- **There seems to be a correlation between how frequently the Danes are active on Facebook and how frequently they purchase goods on the internet.** In 2017, 77 % of daily Facebook users had purchased goods online within the last three months, compared to 71 % of weekly Facebook users. This is explained partly by the fact that the group defined as *Daily Facebook users* includes a markedly larger share of young people than *Weekly Facebook users*.

Daily Facebook users are more likely than their weekly counterparts to make online purchases in the "film, music or video" category. Conversely, *Weekly Facebook users* are more likely to purchase "books, e-books, journals and newspapers" than daily users.

5 Method

To read about the methods used, read the method description in each chapter.

- [TV](#)
- [Radio](#)
- [Newspaper/print](#)
- [Internet traffic](#)
- [Internet use and devices](#)
- [Advertising revenue](#)

[For detailed information about the methods used, see the "Report on media development in Denmark 2018" website:](#)

6 Sources and using results

All rights to the data used belong to the original sources/data providers.

When using any of the data, the original source (e.g. Dansk Online Index, Statistics Denmark and Kantar Gallup) must be cited.

The Danish Agency for Culture and Palaces' "Report on media development in Denmark 2018" must also be cited as a source.

Resale and other commercial exploitation/utilisation of data are not permitted in any shape or form.

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