MEDIA DEVELOPMENT 2014
IN DENMARK

STYRELSEN
DANISH AGENCY FOR CULTURE

SUMMARY 2014






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SUMMARY 2014

1. Introduction

This is the first edition of the Danish Agency For Culture's Report "Media Development in Denmark ".

Until now, there has never been a comprehensive report on the media sector in Denmark that included statistics for the use of TV, radio and printed media (newspapers), the internet and mobile devices, as well as analyses and descriptions of the sector's economy, employment and major companies and major analyses of elements that are more content-related.

We hope that the Report "Media Development in Denmark" will at least in the long term enable people to have a complete overview of the Danish media sector and its conditions. An external editorial panel of professionals was appointed when the project was established and the panel has provided advice during the writing of the report. The editorial panel consists of six professional media experts, researchers and media sector representatives who have provided advice, development assistance, prioritisation and quality assurance on an on-going basis.

To learn more about the editorial panel, go to the report's website and select "About the report".

The main aim of this first edition of the report is to establish a basic structure, basic data and basic knowledge, which can be worked on going forward. Future reports will therefore contain updates of the findings and time series that were established in this year's study, as well as new and supplementary surveys that have been carried out, which can contribute to a complete overview of the development of the media.

In the summary below, we select and compile the most important conclusions of the year's surveys.

The report is web-based and divided into a number of web pages. In the separate 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. These separate sections also show which studies or analyses are being considered for inclusion in future reports.

In the media sector analysis section, there is a comprehensive review of the media sector with sub-sectors, in relation to key financial figures such as employment figures, and a review of a number of the biggest media companies in Denmark.

In addition, in the section "Special Reports", you can learn more about a number of major projects that have been initiated about media ethics, media quality and media use and find completed special reports about internet traffic in relation to the reported news media's websites.

It is our aim that in the future the report will cover more and more of the Danish media market and its rapid development. The 2014 report is the foundation for this.

We hope you find the contents interesting, useful and enlightening. Enjoy the report!

2. Why should we be interested in the media?

The media's role in contemporary society is described in an article by Stig Hjarvard, professor in media studies at the University of Copenhagen and a member of the external editorial panel. He writes:

"*The media permeates our society to such a degree that it can no longer be thought of as being separate from other cultural and societal institutions ... an understanding of the media's importance in modern socie-*

ty can no longer be left to a model where the media is considered as something separate from the rest of society and culture. The media is not just a set of technologies, which companies, parties or individuals can choose to use – or not use – at their own discretion. A significant part of the media's impact is that it has become an integrated part of other institutions' operations, while at the same time it has achieved independence, so that other institutions to a certain degree must subordinate to the media's logic. The media is embedded in society and culture and at the same time, it is an independent institution that stands between the other cultural and societal institutions and coordinates the mutual interaction of these institutions. This structural relationship sets a number of premises for how media messages in specific situations are used and perceived by the sender and recipients' and in that way affects the interaction between people ..."

In other words, the media is a link between the different institutions of society and between citizens and the society. It is through all of the forms of the media that people can hear, learn, study, stay up to date and remain informed about the wider society and also the international world – and above all, via the media, citizens, politicians, pundits etc., have the opportunity to make their opinions and positions known and 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.

The media is not disconnected from society but functions under the premises, conditions and frameworks laid down by legislation, finance and consumers.

The media is an essential part of our society and democracy. It follows developments in a society, examines areas that are uncomfortable and creates – for better or worse some might say – transparency and context. The media is a significant platform for the dialogue that develops and drives society, and it is here where differences and similarities are found that define Danish society or groups that exist within Danish society that provide a sense of community – the shared narrative.

Therefore, we should be interested in the media, the consumption of the media and the state of the media.

3. Evolution or revolution?

The media constantly changes, especially in recent years. Technological development and the widespread availability of ever-faster internet connections in Denmark and the associated price movement has opened new ways to produce and publish content – supplied by professionals and ordinary individuals – allowing people to consume precisely the media content that they want, where they want it and to what degree.

Now anyone can watch, listen and read 24 hours a day – and even be heard and watched – more or less whenever it suits them, and on any digital device.

The media market is undergoing structural changes in these years, but the impact on the different media groups is not the same and it is happening at different speeds.

The changes are affecting commercial media and public service media differently, since among other things, commercial media depends on the users' willingness to pay for content but also by other sources of finance.

It is important that public service media reach a wide audience, because to a great degree their legitimacy depends on them being used by as many people as possible. They must provide a service to every Dane, while complying with the terms and conditions for public service companies, which are described in contracts and licences.

In recent times, media categories have been undergoing change and perhaps may even be disintegrating to a certain degree. For many years, newspaper publishers' products have been available in print form and to an ever-increasing degree available online (if not more available) where they are constantly updated and regularly have moving images.

Traditional TV enterprises no longer only offer linear flow television through traditional television viewing, they now also show the same content as a live stream on the internet. They also have streaming services for staggered, on-demand viewing on the internet of all of the broadcast programmes, and in some cases they let people view content that has not yet been broadcast or will not be broadcast on traditional television. The TV stations have websites with comprehensive and varied content, such as news, entertainment and education.

Radio too can be downloaded on-demand as a live stream on the internet or as podcasts for staggered listening. In several cases, web cameras have been set up in radio station studios, so people can view the radio programmes as they are broadcast live, and they can watch the filmed radio programmes later via YouTube and other platforms. However, does radio stop being radio when this happens?

In recent times, some TV distributors, mainly international distributors , have started to provide content that can be viewed via other channels but which are only available as on-demand at the individual distributor. The distributors thereby change to a certain degree from being a platform to being a media.

Are we witnessing media evolution or a media revolution? Are media users changing their habits at the same speed as the new options are becoming available?

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. In fact, 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 following text will review the development of consumption of different platforms.

3.1 Television

The average daily viewing figures for traditional television fell from 195 minutes in 2012 to 180 minutes in 2013 – a fall of almost 8 %. However in 2013, there is still a very high level of television viewing from a historical perspective – in 1992, the daily viewing figure was 143 minutes. There is a clear correlation between a viewer's age and the amount of time spent watching television. The older the viewer, the longer time he or she spends watching television every day. In 2013, children up to the age of 11 watched an average of 98 minutes of television every day, while people who were 71 years old or older, watched 265 minutes of television every day.

Some television viewers have moved over to other platforms, however, this is not measured in the official media industry analyses. This means that we do not know to what degree television viewing is happening on other platforms. However, the Gallup/TV-Meter – Annual Survey figures shown in Table 1, indicate that watching television on the internet is only developing relatively slowly. A large share of homes that have internet access – almost 43 % in week 1-13 in 2014 – never watch television on the internet.

Table 1: How often is television watched on the internet at home – as a share of households (%)

	2011			2012			2013			2014
	Week 1-13	Week 14-26	Week 31-47	Week 1-13	Week 14-26	Week 31-48	Week 1-13	Week 14-26	Week 31-48	Week 1-13
Several times a day	6.8 %	6.1 %	6.3 %	6.4 %	5.5 %	5.2 %	6.9 %	5.9 %	6.9 %	8.4 %
Once a week	4.8 %	3.8 %	4.2 %	4.8 %	5.0 %	5.1 %	5.8 %	5.7 %	6.0 %	7.9 %
4-6 times a week	4.1 %	3.7 %	3.8 %	3.8 %	3.8 %	4.0 %	4.7 %	4.4 %	4.9 %	4.3 %
1-3 times a week	13.7 %	13.4 %	12.7 %	12.5 %	12.1 %	11.8 %	13.4 %	14.7 %	12.9 %	14.1 %
1-3 times a month	11.6 %	10.8 %	11.4 %	11.1 %	10.7 %	12.7 %	11.1 %	11.5 %	10.7 %	11.0 %
More rarely	13.7 %	14.9 %	15.0 %	14.0 %	13.9 %	13.4 %	13.2 %	12.7 %	12.2 %	11.3 %
Never	45.3 %	47.3 %	46.7 %	47.3 %	48.9 %	47.8 %	44.9 %	45.0 %	46.4 %	42.9 %

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

3.2 Radio

In this first edition of the report on the development of the media in Denmark, analyses have solely been carried out in relation to national radio. Local radio is not included in this year's report but it is expected that it will be included in the future.

The average daily listening figures for radio fell from 119 minutes in 2012 to 117 minutes in 2013 – a fall of almost 2 %. The general trend is one of decline and in 2008, Danes listened to 131 minutes every day. Like television, there is a correlation between the amount of time spent listening to radio and the listener's age. In 2013, people aged 12 to 18, listened to 54 minutes of radio every day while people who were 70 years old or older, listened to 154 minutes every day.

Just like television, there are a proportion of listeners who are not registered by official media industry figures, e.g. podcasts are not included.

Politicians in Denmark have decided that FM radio should be shut down and all radio should be digital radio by 2019, if by the middle of 2018 over 50 % of listeners use digital radio.

The development on the user side in the direction of listening to radio on new platforms is relatively slow, as the table below shows.

Table 2: Distribution of radio listening (national) on platforms in %, in the period 2009–2013

	2009	2010	2011	2012	2013
Unknown platform	21.3 %	15.4 %	14.9 %	14.3 %	15.4 %
FM	71.7 %	77.2 %	76.9 %	67.2 %	64.1 %
DAB	5.5 %	5.7 %	6.6 %	9.2 %	11.1 %
INTERNET	1.6 %	2.4 %	2.5 %	3.4 %	4.3 %
Cable	-	-	-	5.0 %	6.0 %

Part of the explanation of this may be because the history of radio is not the same as the history of television. For many decades, radio was a mobile medium that could be listened to in locations outside the home. In this way, new technologies do not provide the same advantages in the form of new mobility in the same way they do for example for television, or in the form of better sound quality. Above all, the benefit is the increased provision of channels that are accessible via other technologies than FM – diversity of choice is increasing.

Learn more about radio consumption in the radio section in the report’s website.

3.3 Newspapers

In 2013, almost 2.2. million Danes read a printed newspaper every day. In 2012, the figure was over 2.4 million, so there has been a decline of over 11%. In 2010, almost 2.8. million Danes read a printed newspaper every day. The printed newspapers are clearly the media group that has suffered the worst fall in the number of readers. Their readership declined by almost 22 % in the period 2010 - 2013.

The national newspapers' readership declined by over 27% in the period 2010 - 2013. This is a greater decline than their provincial counterparts. The provincial newspapers' readership declined by 20 % in the same period.

The annual report has shown that attitudes play a crucial role for the readers of printed media and this means there is a major differentiation between the readers.

Table 3: Newspaper readership – average daily readers (x 1000) of printed newspapers in 2010–2013

	2010	2011	2012	2013
All daily newspapers	2,763	2,606	2,436	2,159
All national daily newspapers	2,051	1,904	1,772	1,495
All provincial newspapers	1,281	1,213	1,125	1,027

Written reported (news) media are and have been undergoing powerful changes but they most definitely will not disappear as printed media, not today or tomorrow. The development, where consumption to a great degree has moved over to the internet, has provided fertile ground for online media and for new products in newspaper groups' product portfolios.

The newspapers groups' products have for a very long time been available on the internet, and according to them, they have never reached so many Danes as they do now. However, the development has also challenged the newspaper groups because they are forced to find new business models that can ensure earnings and thus ensure the production of content. When assessing the development of printed written media, it is therefore relevant to also look at a number of newspaper groups' output on platforms other than printed media to get an impression of the overall range. More details about the media's range on the internet are given in section 4.3 below.

Learn more about newspapers' readerships in the news section in the report's website.

3.4 The internet in general

In 2013, 91 % of Danes had access to the internet. Age has a major significance in this context. Internet access at home is almost universal for Danes up to the age of 54, but only 51 % of people aged 75 to 89 have access to the internet.

The share of Danes aged 16 to 89 who use the internet on a daily basis rose from 81 % in 2012, to 84 % in 2013. In 2005, 57 % of Danes used the internet on a daily basis.

There is also a large difference between the youngest and the oldest age groups in relation to internet use. Over 90 % of Danes who are 44 years old or younger, use the internet every day or almost every day. This share falls gradually as age increases. It is 57 % for people aged 65 to 74, 29 % for people aged 75 to 89 – In the oldest age group, 51 % of Danes have never used the internet.

The laptop was the most frequently used piece of equipment for accessing the internet in 2013 – laptops were used by 79 % of internet users to access the internet, followed by smartphones at 56 %. Tablet computers have not yet gained much of a foothold; however, tablet computers were used by 34 % of internet users to access the internet 2013. Age also has a big impact on what kind of equipment is used to access the internet. For example, 81 % of people aged 16 to 24 used a smartphone to access the internet in 2013, compared to only 5 % of people aged 75 to 89.

Interest in social media is immense. In 2013, 65 % of Danish internet users were connected to a social media platform service – 10 years ago very few people had heard of social media.

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

3.5 Mobile phone/tablet

According to Statistics Denmark's analyses of electronics in the home in terms of type of consumption and time, 98 % of Danish families had a mobile phone in 2013. From 1994-2002, this figure had increased from 14 % to 84 %. The percentage increase from 2002 onwards is obviously significantly lower. The widespread use of mobile phones had reached a level where it was almost impossible for it to be any higher. Smartphones have spread very rapidly. In 2011, 33 % of Danish families owned a smartphone, which increased to 63 % in 2013. For tablet and mini computers, the figure has increased from 9 % to 33 %.

Mobile phone and smartphone use is very high in Denmark. According to a study carried out by Statistics Denmark in 2013, 93 % of Danes had used a mobile phone or smartphone in the last three months.

There is a difference in mobile phone or smartphone use in term of age groups. Among people who are 64 years old or younger, 90 % had used a mobile phone or smartphone, and this figure fell to 70 % for people aged 75 to 89.

The most used function was the traditional SMS, which 84 % had used, while the second-most used function was accessing the internet via a mobile/smartphone, which 55 % had done in 2013. In 2010, only 21 % had done this. There is also a large increase in the use of apps, GPS, online banking and payments via mobile phones. In effect, Danes are increasingly mobile in their daily activities – correspondingly, so too so is their media use. However, for most mobile functions and mobile services, there is a very great difference in their use by different age groups. The trend is without exception that the youngest age groups use the different mobile functions and mobile services to a much greater degree than older age groups.

Learn more about mobile phone/tablet use in the internet section in the report's website.

4. Public service and non-public service media

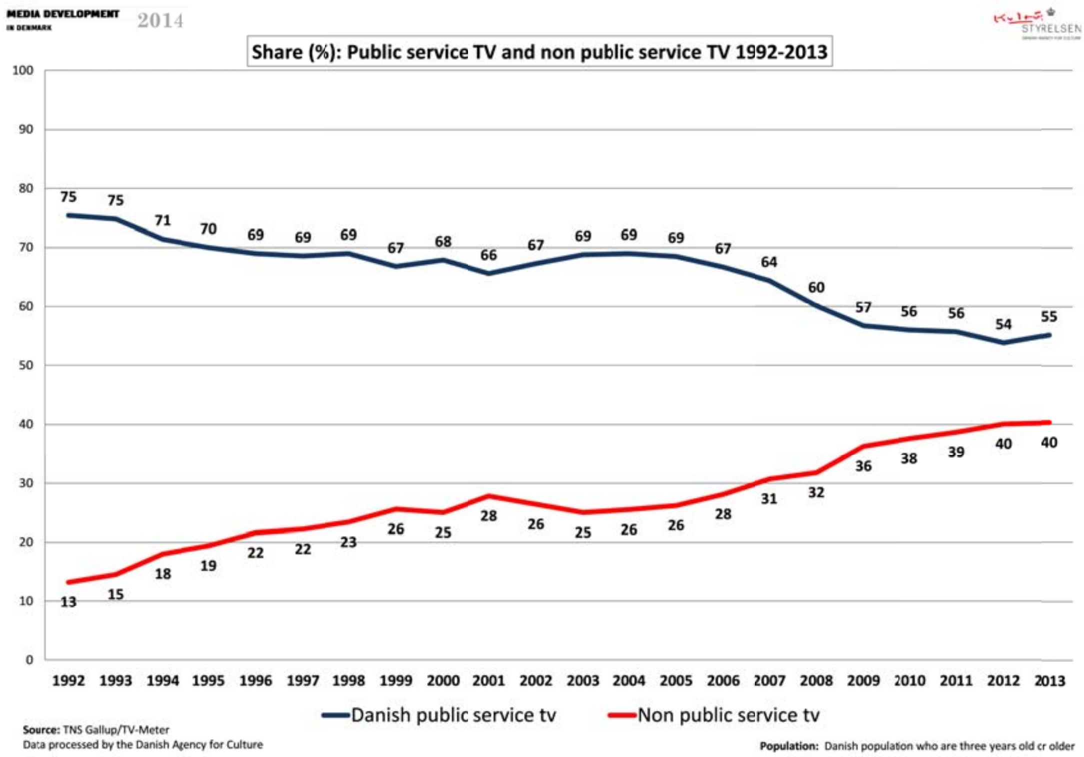
The role of public service media is constantly debated and in the Nordic countries, public service media have a much greater role than in other western countries. In Denmark, public service media, because of requirements such as those in the public service contracts, are required to be available on several platforms. There is a general obligation for the majority of Danish public service providers to have services available on what is considered the most relevant platforms. The results of this are summed up in the following text.

4.1 Television

Since 1992, when public service television accounted for 75 % of viewing, Danish public service television's share of viewers has decreased gradually while non-public service television's share has increased gradually. The trend has slightly stagnated in the last couple of years and public service television still accounts for over half of all the viewing by Danes in 2013 (55 %). Different factors affect how much public service television is watched by an individual, including age and education. Public service has a 52 % share of children aged 3 to 11 and the general trend, is that the younger the person, the smaller public service television's share is. In 2013, public service television had a share of 67 % for people who were 71 years old or older, while this fell to 37 % for young people aged 12 to 18. In relation to education, the higher the education, the higher the share of public service television (no vocational education: 54 % share, long further education: 64 % share).

By launching a number of niche channels, both DR (Danish Broadcasting Corporation) and TV2 Danmark A/S, like the commercial television stations, have followed the development of more fragmented media consumption. However, in contrast to DR's niche channels, TV2's niche channels do not have to meet public service obligations. These channels are therefore not included as public service television in this report but rather as part of non-public service television. TV2 regions' 24-hour channels were launched in 2012, and they accounted for almost 1 % of viewing in 2013. In addition, TV2 regions' share of programming is sent in windows on TV2's main channel.

Figure 1: Share in % for public service television and non-public service television, 1992-2013



Public service television still plays an important role as mass media in Denmark. This is also reflected by the number of Danes who watch the public service channels during any given week.

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 uninterrupted minutes) is 89 % for public service television and 74 % for non-public service television.

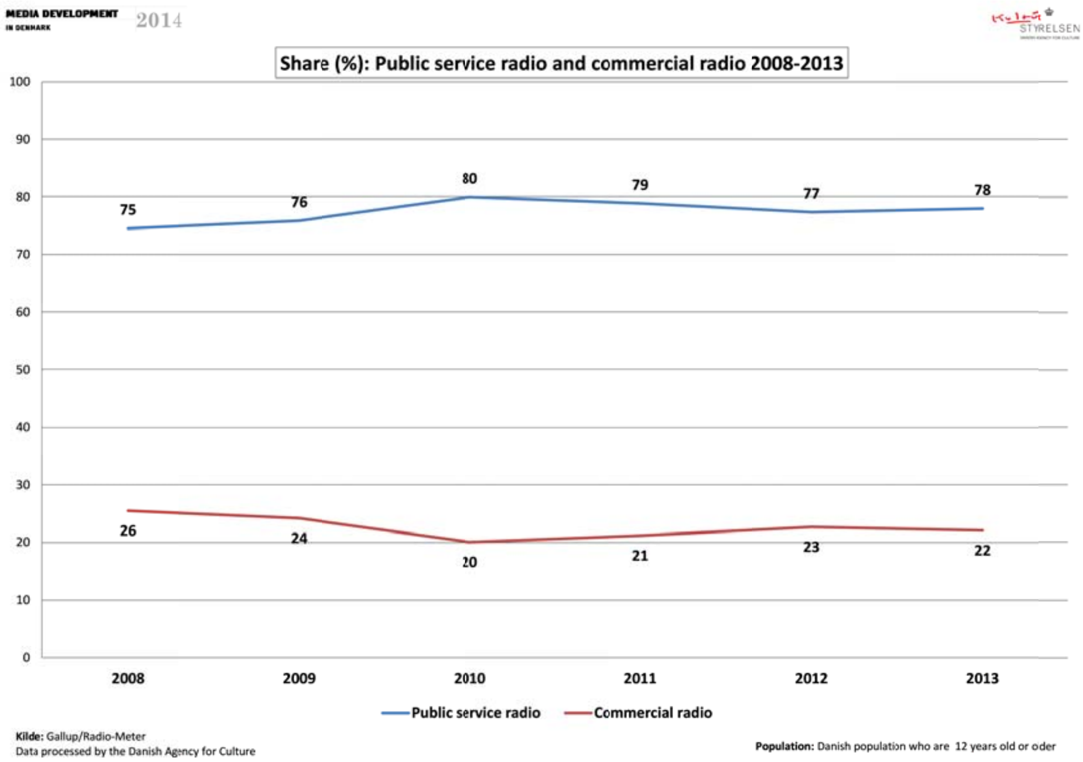
In relation to people watching television on platforms other than traditional flow TV, there are no official media industry figures. However, we know that from a web-based study carried out by TNS Gallup for the Danish Consumer Electronics Association (BFE), the three most-used streaming services in homes are YouTube (39 %), DR NU (23 %) and Netflix (22 %).

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

4.2 Radio

Public service radio represented by the three national radio channels, accounts for a very large share of listening in Denmark. Throughout the entire period of 2008-2013, public service radio accounted for at least a 75 % share of listening and in 2013, it accounted for 78 %. Age has a major impact on public service radio's share of listeners: In 2013, public service radio had a share of listening of 96 % among people who were 70 years old or older, while this share fell to 59 % for young people aged 12 to 18. Radio24syv was launched in 2011 and in 2013, it had achieved a share of listening of almost 2 %. There is very little movement in the share of public service radio and commercial radio, and in 2013, commercial radio had a 22 % share of national listening.

Figure 2: Share in % for public service radio and commercial radio, 1992-2013



Public service radio also has a high weekly reach: During any week, public service radio channels are heard by 83 % of Danes for at least five uninterrupted minutes, while that figure is 63 % for the national commercial radio channels, which means these channels also are in contact with very many Danes.

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

4.3 The internet

In 2013, the national newspapers' websites had in total over 2.5 million users – an increase of just over 9 % compared to 2012, while public service media had almost 2.6 million users – an increase of almost 3 % compared to 2012. The two media groups had more or less the same population reach (share of the population they are in contact with) in 2013 – 55 % and 57 respectively. This is an increase for both media groups compared to 2012.

Table 4: Use of national newspaper media's websites and public service media's websites 2009-2013

Danish internet users, who are seven years old or older	2009		2012		2013	
	National newspaper media	**Public service media**	**National newspaper media**	**Public service media**	**National newspaper media**	**Public service media**
Users (x 1000)	2,166	2,373	2,298	2,317	2,514	2,585
Population reach	51 %	55 %	51 %	51 %	55 %	57 %
Visits (x 1000) per month	70,063	37,453	100,304	46,676	96,964	51,885
Visits per user per month	32	16	44	20	39	20
Page views (x 1000)	297,043	233,402	382,268	195,397	352,631	190,749
Time spent per user per month (hours:minutes:seconds)	2:38:20	1:45:04	3:33:55	2:00:16	2:59:00	1:51:01

The two media groups are more or less at the same level in terms of the total number of users and reach. If we also take into account the total number of visits, the total number of visits per user per month, the total number of page views and time spent, national newspaper media websites are much higher than public service media. However, there has been some movement from 2012 to 2013, with the gap between national newspaper media websites and public service media websites narrowing slightly. There is also differences among the national newspaper media; in particular, the tabloid media's higher total number of users boost the figures for national newspaper media websites.

This development can partly be ascribed to the fact that newspaper media have implemented different access payment models for their websites. For example, there are a maximum total number of articles that can be read for free in the individual websites each month, after which the reader is prevented from reading any more content for the rest of the month or there may be some content that can be accessed by payment while the rest of the content is available for free, regardless of the total number of articles that the user has read.

These payment models probably mean that the users visit several media websites than they would have done if all of the content had been free or they access the same websites from several different devices.

4.4 Summary of public service

Public service media continues to account for a large part of Danes' media consumption when it comes to traditional TV and national radio. Public service media also has major presence among Danes when it comes to the internet. In relation to the more active use of internet media – measured or example, in relation to the time spent by Danes using net pages and how many page views and visits the users have, the level of use of public service media websites is less than newspaper groups' websites.

This situation may be due to the fact that public service media on radio and television were established many decades ago, becoming fully established and consolidated in the market and only now, much later on, have they faced competition from commercial providers from foreign media on a large scale. In relation to the internet, public service media has in effect "kept up" with the commercial media in line with the development.

Learn more about public service media on the internet in the internet section in the report's website.

5. What do Danes watch and listen to on television and radio?

We know to a certain degree what programme types media users have access to and how they use what is available on the channels. However, what is being broadcast and what is being watched?

5.1 Broadcast and watched television programme categories

In total, 51.4 % of broadcast time on public service channels in 2013 was used to broadcast news (general news and sport), current affairs, regional programmes, information, culture and education. In relation to this, viewers divided their television viewing on the public service channels, so that 53.9 % of the time they spent looking at public service channels was spent on looking at these programme categories. They also spent a relatively little more time to watch these programmes on the channels than was broadcast.

The calculated radio figures show which programme categories have an "over consumption" or "under consumption" in relation to how much is broadcast in the individual programme categories. For example, in 2013 there was an over consumption of current affairs programmes (ratio 168) and regional programmes (ratio 740), i.e. the Danes saw relatively more of this than was broadcast – and an under consumption of information and culture (ratio 76) and education (ratio 33).

Table 5: TV: Broadcast time and viewing time divided across programme categories on public service television in 2013

	PUBLIC SERVICE TV Broadcast time distribution in %, 2013	**PUBLIC SERVICE TV** Viewing time distribution in %, 2013	**Ratio broadcast-seen***
General news	12.9 %	14.4 %	112
Sports news	0.3 %	1.4 %	467
Current affairs	6.5 %	10.9 %	168
Regional programmes	0.5 %	3.7 %	740
Information and culture	30.9 %	23.4 %	76
Sport	2.5 %	7.0 %	280
Entertainment	4.1 %	6.7 %	163
Music	1.6 %	1.5 %	94
Education	0.3 %	0.1 %	33
Foreign fiction	33.7 %	22.3 %	66
Danish/Nordic fiction	6.7 %	8.6 %	112

***** *Ratio = 100: Same amount seen as was broadcast of category, Ratio > 100: Relatively more seen than was broadcast of category, Ratio < 100: Relatively less seen than was broadcast of category*

In 2013, 26.6 % of non-public service total output programme categories consisted of news (general and sport), current affairs, information and culture, while viewers in total spent 31.1 % of their viewing on the non-public service channels in these categories (however, see note ** below Table 6 below). Viewers of public service channels also watched slightly more than was broadcast in these categories. General news and current affairs fell here, to a ratio of 192 and 156, respectively. In other words, significantly more was viewed than was proportionally broadcast in 2013. Because TV2/NEWS is not covered by TV2's public service obligations, this channel is not listed under public service TV and this obviously has an influence on the broadcast times and viewing times distribution in this channel category.

*Table 6: TV: Broadcast time and viewing time divided across programme categories on non-public service television** in 2013*

	NON-PUBLIC SERVICE TV Broadcast time distribution in %, 2013	**NON-PUBLIC SERVICE TV** Viewing time distribution in %, 2013	**Ratio broadcast/seen***
General news	5.1 %	9.8 %	192
Sports news	0.1 %	0.1 %	100
Current affairs	1.8 %	2.8 %	156
Information and culture	19.6 %	18.4 %	94
Sport	15.2 %	13.7 %	90
Entertainment	5.4 %	9.2 %	170
Music	17.1 %	3.1 %	18
Foreign fiction	13.8 %	15.7 %	114
Danish/Nordic fiction	0.4 %	1.6 %	400
Non-categorised fiction* **	21.4 %	25.5 %	119

** Ratio = 100: Same amount seen as was broadcast of category, Ratio > 100: Relatively more seen than was broadcast of category, Ratio < 100: Relatively less seen than was broadcast of category*
*** Non-categorised programmes are subtracted for non-public service television. Therefore, the report does not fully cover these channels*
**** Assessed to be foreign fiction after an incomplete review of programme level.*

That is, the Danes in general are hungry for news and current affairs and spend a relatively large part of their television viewing time on watching public service channels to see these types of programmes. However, entertainment, sport and Danish/Nordic fiction are also popular programme types, but this year's analysis has shown a significant difference between different age groups in terms of the programme types that Danes want to see.

Learn more about programme categories, broadcast time and viewing time on television in the television section of the report's website.

5.2 Broadcast and listened to radio programme categories

Only the public service media codes radio programme category. This means we only know about the distribution of broadcast and listened to public service channels and nothing about the national commercial channels.

In 2013, 48 % of the total broadcast time and 68 % of listening time on the public service radio channels consisted of news, current affairs, information and culture. It seems clear then that Danes to a very high degree consider and use Danish public service radio as a means of gaining information.

Table 7: Radio: Broadcast time and listening time divided across programme categories on public service radio in 2013

	PUBLIC SERVICE RADIO Broadcast time distribution in %, 2013	**PUBLIC SERVICE RADIO** Listening time distribution in %, 2013	**Ratio broadcast/listened to***
News	12.8 %	11.2 %	88.0
Current affairs	19.7 %	39.0 %	197.4
Information and culture	15.5 %	17.8 %	114.8
Sport	0.8 %	2.3 %	308.5
Music	42.1 %	17.6 %	42.0
Drama and fiction	0.1 %	0.1 %	92.3
Entertainment	9.1 %	11.9 %	131.5

** Ratio = 100: Same amount listened to as was broadcast of category, Ratio > 100: Relatively more listened to than was broadcast of category, Ratio < 100: Relatively less listened to than was broadcast of category*

In addition, in relation to radio listening, it is confirmed that the Danes are interested in listening to current affairs, information and culture.

Learn more about programme categories, broadcast time and listening time on radio in the radio section of the report's website.

5.3 Content on the internet and mobile devices

At the time of writing this report on the media's development, we do not have detailed knowledge about precisely which content internet users look for, or their search activity and thus which media content they precisely seek on the internet.

However, we do know from the previously mentioned survey carried out by Statistics Denmark, there is in general major interest in reading or downloading news on the internet – 73 % of all internet users aged 16 to 89, did this in 2013. Of mobile phone users, 60 % in the same age group downloaded or read the news and newspapers outside their home or at the workplace using their mobile phone or smartphone.

6. Media sector economy and employment

In 2011, the media sector had a total turnover of DKK 24.4 billion, compared to a turnover of DKK 26.9 billion in 2008. This is a reduction of 9 %, equivalent to DKK 2.5 billion. However, the various parts of the sector have been affected differently. In particular, the printed written media business area (defined as weekly magazines and magazines, local newspapers and advertising papers and daily newspapers) has been affected to a much greater degree compared to other media. Together, they have experienced a decline of DKK 2.2 billion in the period 2008-2011.

The earnings structure for advertisements in the Danish media market was changed significantly by internet advertising and the emergence of major international players. It is estimated that 51% of all Danish money spent on advertising goes to foreign companies. The amount that is allotted abroad, represents a total of 20 % of the advertising budget in 2013.

This creates a number of challenges, especially for printed written media which loses subscription earnings, but also for the other media groups that are dependent on advertising sales and so therefore can no longer achieve the same earnings to finance the production of their content.

Obviously, the downturn in the media sector has had an impact on operations. The various businesses operating in the sector have reduced manpower by 8 %, equivalent to a reduction of 2,015 jobs. However in 2011, the sector continued to employ 24,560 people in Denmark – defined as full time and part-time employees. If employment is calculated as full-time equivalent, full-time equivalent employment has fallen by 10 % in the period 2008-2011, equivalent to 1,835 full-time equivalent jobs. As with the decline in turnover, the printed written media has adjusted its operations the most. In total, it has seen a reduction of 2,559 jobs and a reduction in relation to full-time equivalent jobs of 1,777 in the three businesses.

Basically, all of the businesses have been affected by the crisis, but radio seems to be especially undergoing a positive development. Despite the decline in turnover and full-time equivalent employment, media companies can continue to create value, this is indicated by the added value in the individual businesses over time, which in the light of operational adjustments has increased the value added per full-time equivalent job in the printed media.

7. Sources

Source for figures used in the summary:

Television viewing: Gallup/TV-Meter

Radio listening: Gallup/Radio-Meter

Newspaper reading: Gallup/Index Danmark

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