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SLOTS- OG KULTURSTYRELSEN

MEDIA DEVELOPMENT
IN DENMARK

2017

SUMMARY AND DISCOURSE

PHOTOS: COLOURBOX

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Summary and Discourse 2017

Contents

1 Introduction

The media world is developing fast and media providers must consistently adapt and adjust. Media users have to sort through and prioritise new content on new platforms. The media industry is generally fraught with radical changes. These are developments that in some respects divide the population and highlight a generation gap.

We watch less flow TV, listen to less conventional radio and read fewer printed newspapers. At the same time, increasing numbers of Danes – especially young people – stream TV and view content on demand. More of us access the internet from mobile devices. The emerging scenario is a patchwork of usage patterns, in which many of today's media users choose to snap up news, TV series and radio broadcasts on the fly and access content wherever and whenever they choose. The new ways of using the media usage may seem strange, in particular to older users, who remain faithful to conventional media, such as printed newspapers, radio and TV.

These developments must, however, be seen in a wider context. Firstly, that there are significant differences in media use between different groups in the population is a long-standing tradition, which applies, for example, to the conventional media, i.e. radio, flow TV and printed media.

Secondly, it is true to say that, even though media provision is in constant flux, media users do not forsake the conventional media from one day to the next. Even though they may take new media into their repertoire, a great many people continue to use the conventional media on a daily basis.

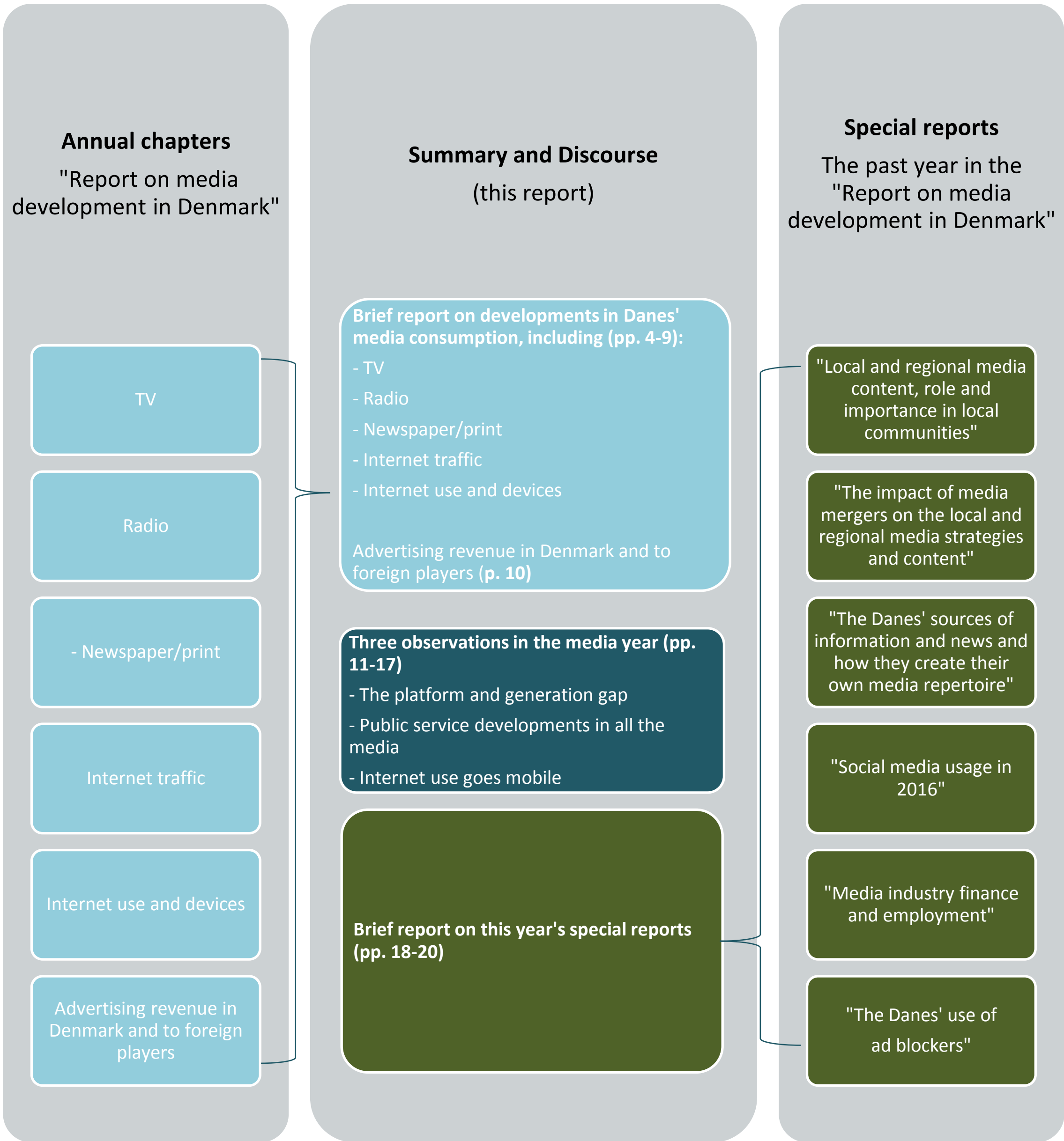
Thirdly, media developments may yet do everything but divide the population. Increasing numbers of older people are now streaming programmes on demand and use e.g. their mobile phone for day-to-day activities. Social media usage is also increasingly widespread among the oldest age groups. Finally, a large share of younger people continues to listen to radio and watch conventional flow TV.

This is the fourth 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 2017 was prepared in consultation with an external editorial panel set up specifically for the "Report on media development in Denmark". The editorial panel consists of seven expert media professionals, researchers and industry representatives who have provided advice and suggestions regarding development and prioritisation as well as quality assurance throughout.

The objective of this overview is to highlight and discuss the most important conclusions in this year's surveys – not only fresh studies of media usage in Denmark, but also special reports published in the past year about local and regional media, media mergers, Danish sources of news and information, social media use and media industry financial and employment, respectively.

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.

2 Developments in the Danes' media consumption

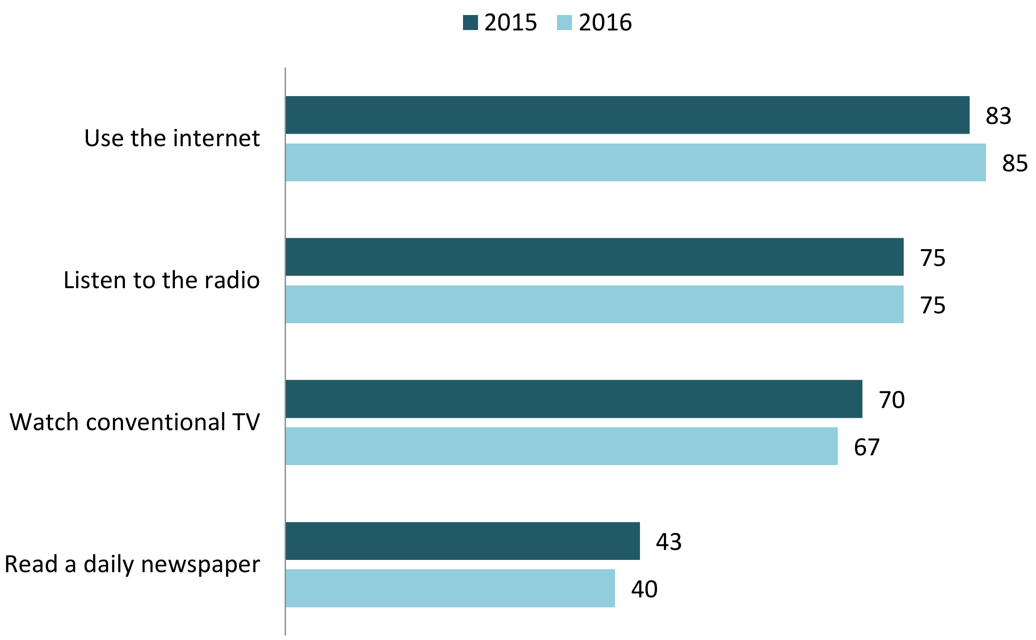
The media platform used by most Danes in 2016 was the internet. In 2016, 85 % of the Danes used the internet daily, an increase from 83 % in 2015. The internet provides access to a very wide range of activities, of which media usage is but one. Internet coverage in the population is generally high but the rate of increase is no longer as steep as in previous years.

The second most popular platform in 2016 was radio. 75 % listened to the radio, precisely as in 2015.

Conventional TV was the third most popular daily media activity in 2016. There is a small decline in the number of people who watched TV daily compared to previous years, i.e. from 70 % in 2015 to 67 % in 2016.

40 % of the population read a printed newspaper daily in 2016. This is a decline compared to 2015, where the percentage share was 43.

Figure 1: Percentage share of Danes who use different media platforms on a daily basis. 2015-2016



Source: Statistics Denmark; Kantar Gallup Radio-Meter; Kantar Gallup TV-Meter, Index Danmark/Gallup

2.1 TV

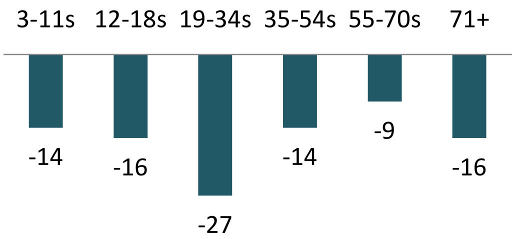
On average in 2016, the Danes watched conventional TV for 2 hours and 38 minutes each day. This is a decline of 14 minutes compared to 2015, and 43 minutes compared to 2010.

In 2016, 12-18s watched least conventional TV, on average 49 minutes a day, while Danes aged 71+ watched most TV, i.e. 4 hours and 22 minutes a day on average.

Among 19-34s, average daily time spent watching conventional TV fell by almost half an hour from 2015 to 2016. For most of the other age groups, the decline was about half as great.

Biggest fall in TV viewing among younger people

Figure 2: Change in minutes – average daily viewing time 2015-2016



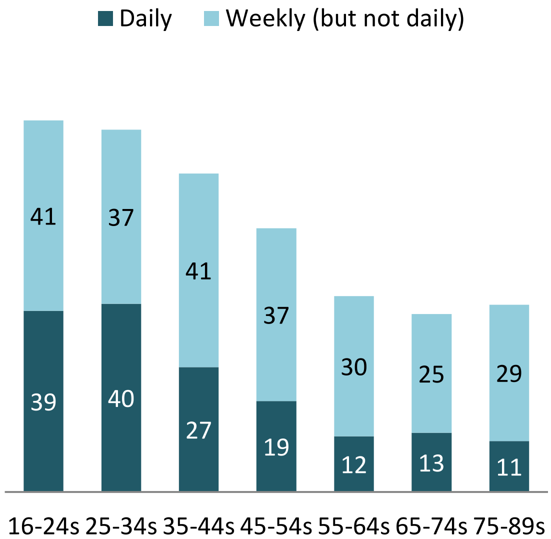
Source: Kantar Gallup TV-Meter

The slump in conventional TV watching is probably partly because some watching now takes place on digital platforms. Age is also very significant here.

Generally speaking, a significantly larger share of young people than the elderly streams TV from TV channels. Moreover, the share of young people who have streamed video on demand from streaming services is higher than the share who streamed from TV channels.

Young people stream most often

Figure 3: Percentage share of internet users who stream TV from TV channels



Source: Statistics Denmark. IT use in the population.

As for the 35-44s, streaming video on demand from streaming services is just as popular as streaming TV from TV channels (59-60 %).

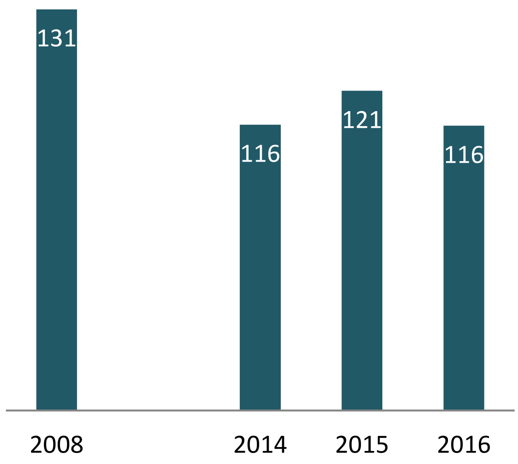
In the older age groups, people tend to stream more from TV channels than video on demand from streaming services.

2.2 Radio

Since the first surveys in 2008, radio listening has fallen consistently each year. However, the downward trend was interrupted in 2015 when conventional radio listening increased by four minutes compared to the previous year. In 2016, listening time fell again by as much as it had increased in 2015.

Radio listening continues to fall

Figure 4: Average daily listening time in minutes



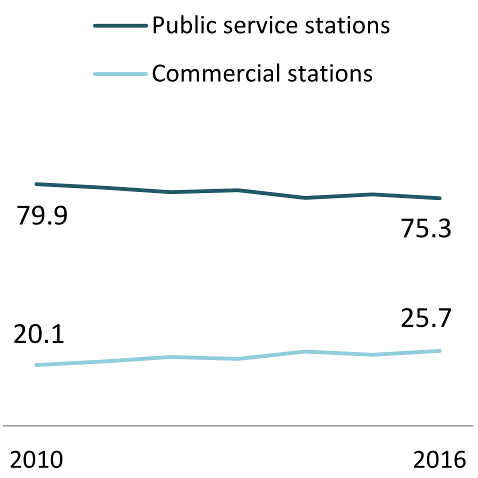
Source: Kantar Gallup TV-Meter

This is, however, not the same as saying that all radio stations lost listening time. The overall fall in radio listening is due to developments in a few – decisive – stations, like P3. From 2015 to 2016, more radio stations saw an increase in listening time than those who suffered a fall in listening time.

The public service stations whose listening time fell by almost five minutes a day, account for the general decline in listening time from 2015 to 2016. Commercial radio listening time rose by just less than half a minute per day. This means that the *percentage share* of public service listening has also fallen, which has been a consistent trend since 2010.

Falling public service share

Figure 5: Percentage share of radio listening



Source: Kantar Gallup TV-Meter

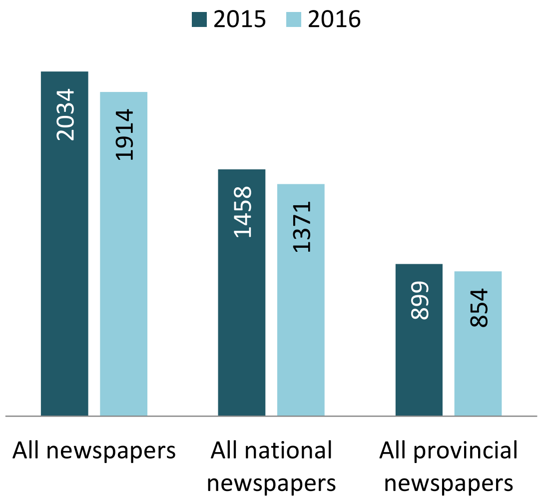
In 2016, 75.3 % of radio listening was on the public service stations and 24.7 % on commercial stations. With a listening share of just under a quarter, the commercial stations have reached the highest level since surveys began in 2008. From 2010 to 2016, public service and commercial stations respective listening share has fluctuated up and down by a total of 4-6 percentage points, corresponding to an average 0.8 percentage points a year in commercial radio's favour. Radio24syv succeeded in increasing its listening share again in 2016, which means that DR radio stations are the primary cause of the decline in public service listening.

2.3 Newspaper/print

The development in printed newspaper readership is summarised in the following. Online news readership will be examined in chapter 2.4 under. In 2015, most printed newspapers succeeded in avoiding a further fall in readership, which has otherwise been a trend in the newspaper industry for some years. There was no increase in readership in 2016, a year in which the lion's share of newspapers once again lost readers.

Printed newspaper readership is falling

Figure 6: Average daily readership (1,000s)



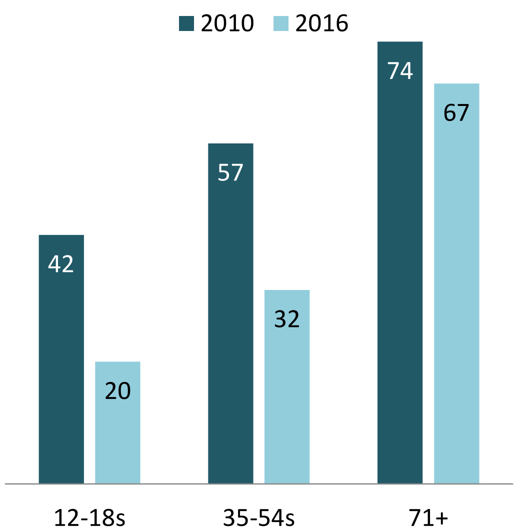
Source: Index Danmark/Gallup

In 2016, 1.9 million Danes read a printed newspaper on a daily basis, corresponding to 39 %. This is a shortfall of 120,000 readers compared to 2015, where 42 % of Danes were newspaper readers. Since 2010, when the share of newspaper readers in the population was 59 %, the average annual daily readership has fallen by 849,000.

From 2015 to 2016, printed newspapers have lost 6 % of daily readership overall, whereas, over the longer period from 2010 to 2016, they lost 31 % of daily readership. Some readers have switched to the newspapers' online services. As a newspaper category, the tabloids have lost an unparalleled number of readers. From 2010 to 2016 the tabloid newspapers lost more than half of their readership. Readership loss from 2015 to 2016 was 6 %.

Lowest reach among the young

Figure 7: Daily reach in % – all newspapers



Source: Index Danmark/Gallup

There is a clear correlation between printed newspaper readership and age. Again in 2016, reach is highest among Danes aged 71+ (67 %) and lowest among 12-18s (about 20 %).

From 2010 to 2016, newspaper reach among the youngest age groups is more or less halved. By way of comparison, during the same period, there was a 23 % fall in reach among 55-70s and a 9 % fall in the 71+ age group.

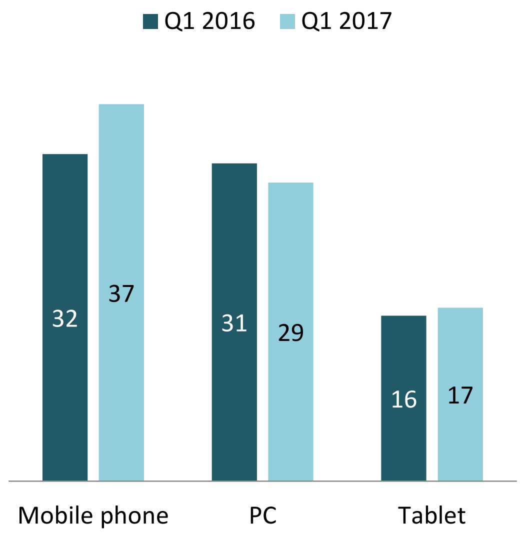
2.4 Internet traffic

From Q1 2016 to Q1 2017, it has become even more obvious that, for many digital news media, mobile devices (mobile phones and tablets) are becoming readers' preferred means of accessing digital news.

However, for these same news media, there is a general downward trend in the number of users who access digital news media from a PC. In this period, using a PC to access digital news media fell from a monthly reach of 76 % to 71 % among internet users of the websites measured, while reach from mobile platforms/devices increased.

Mobile phone is increasingly popular

Figure 8: Average daily reach (%) – various platforms

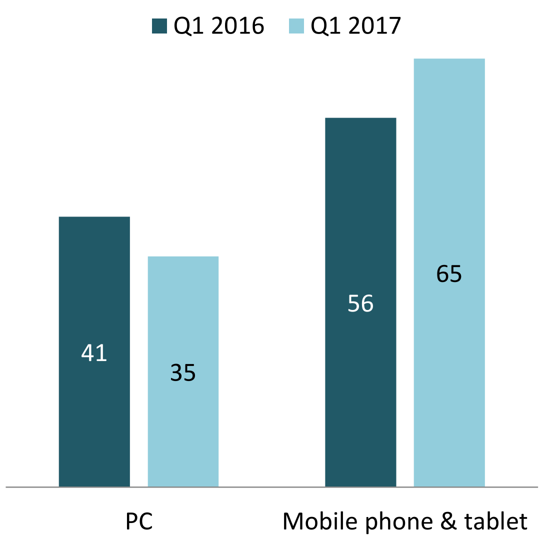


Source: DOI/Kantar Gallup. Universe: Danish internet users aged 7+.

Mobile devices as a platform type have developed positively, with regard especially to daily reach – growing from 32 % in Q1 2016 to 37 % in Q1 2017. Mobile devices are therefore the platform whose reach increased most among Danish internet users during the period. Average monthly page views per mobile device increased by 24 % from Q1 2016 to Q1 2017. Mobile devices also lead the field when it comes to the number of visits. During this period, the average number of visits per month on a mobile device increased by 39 %.

Mobile devices lead the field

Figure 9: Platforms' percentage share of visits



Source: DOI/Kantar Gallup. Universe: Danish internet users aged 7+.

During Q1 2016, the mobile platforms (mobile phones and tablets) accounted on average for 59 % of visits to the websites measured. This share increased to 65 % in the first three months of 2017. PC developments are moving in the opposite direction, falling from 41 % in Q1 2016 to 35 % of visits in Q1 2017. In the case of several medium and small news sites, their position on the users' Top Ten list varies depending on whether the number of users is measured per month, week or day. The four largest news sites (dr.dk, tv2.dk, bt.dk, berlingske.dk) retain their top positions regardless of reach frequency.

2.5 Internet use and devices

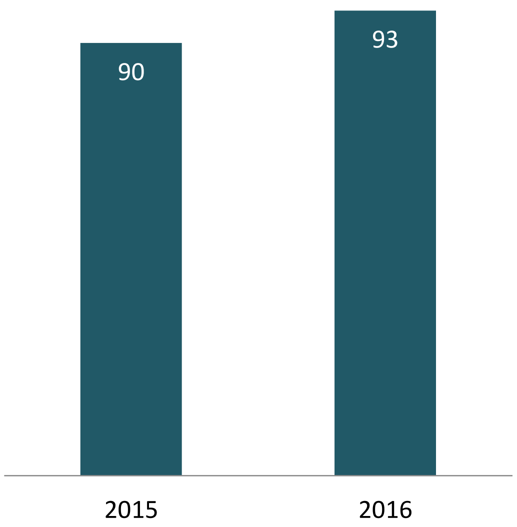
In 2016, 93 % of the Danish population (16-89 years) had internet access at home. This is a 3 percentage point increase compared to 2015. 85 % use the internet daily.

The share that uses the internet daily has increased most among the youngest groups (16-24s) of internet users in this survey. There was a 96 % share in 2015, which has increased by 3 percentage points to 99 % in 2016.

Meanwhile, internet access from a mobile phone or smartphone has more than doubled since 2011. In 2016, almost three quarters of the population (73 %) accesses the internet from these devices. The share of Danes who do not access the internet from mobile devices away from their home or workplace, has fallen from 41 % in 2011 to 16 % in 2016.

Even more people have internet access at home

Figure 10: Share that has internet access at home



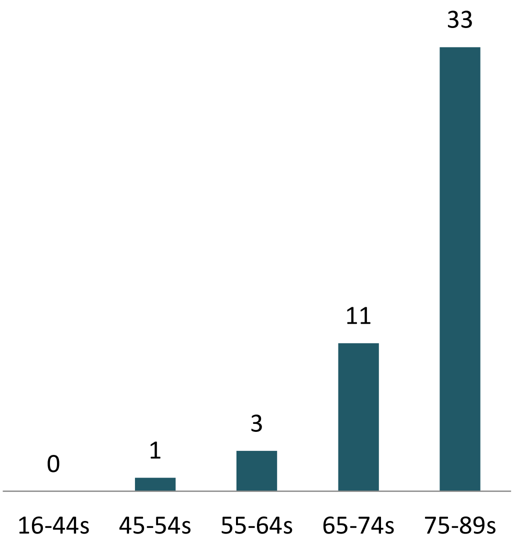
Source: Statistics Denmark – IT use in the population

In 2016, 7 % do not have internet access at home and 5 % of Danes never use the internet.

In terms of age, there is a clear picture. More or less everyone in the age groups under 65 uses the internet. The 5 % who never use the internet are in the 65+ group, and most in the oldest age group (75-89s), where one third do not use the internet. 29 % of these state that they do not use the internet simply because they do not know how.

Almost everyone under the age of 65 is online

Figure 11: Share that has never used the internet



Source: Statistics Denmark – IT use in the population

3 Advertising revenue in Denmark and to foreign players

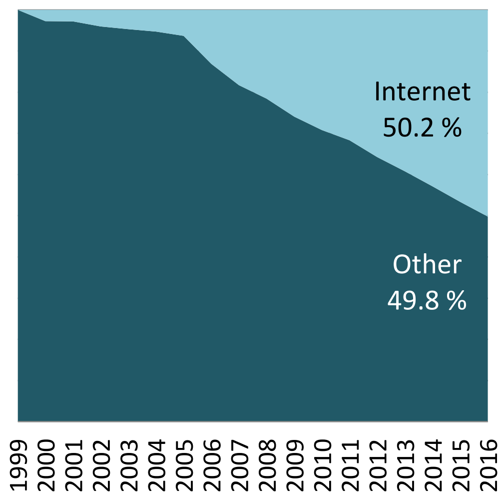
In 2016, the internet's share of ad revenue exceeded 50 % for the first time.

This was due to 9.1 % growth in internet ad revenue from 2015 to 2016 and a continuing and concomitant decline elsewhere, primarily in the printed media. The clearest fall here was a DKK 196 million drop (16 %) in newspaper ad revenue.

The newspapers alone have lost DKK 3.5 billion ad revenue since 1999. Total decline for the printed media since 1999 is DKK 7.9 billion. By way of comparison, internet ad revenue has increased by DKK 6.3 billion since 2000 (the first survey). Internet ad revenue p.a. is currently DKK 6.7 billion. Among the other conventional media, there is a moderate fall in ad revenue: TV fell 1 %. However, with 12 % ad revenue growth, radio achieved its highest share of ad revenue in the survey period, corresponding to DKK 370 million (at 2015 prices). Radio ad revenue had a 2.8 % market share in 1999.

Internet ad revenue is increasing

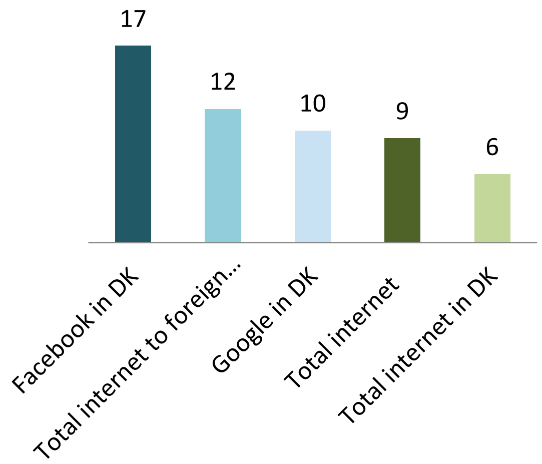
Figure 12: Share of total ad revenue that is from the internet



Source: The Danish Advertising Expenditure Survey 2015

Dissimilar growth on the internet

Figure 13: Developments in ad revenue



Source: The Danish Advertising Expenditure Survey. Danish Media Research

Foreign players' share of total ad revenue increased from 26 % to 28 % 2015-2016. As a share of total internet ad revenue targeted at Danish media users, the foreign players' share in 2016 was 56.5 % compared to 55.2 % in 2015. The share of internet ad revenue that left the country was up by 12 %, while the share that remained in Denmark increased by 6 %. Google and Facebook make up most of the foreign players' share of internet ad revenue with DKK 3.7 of a total of 3.8 billion that went to foreign players in 2016. They increased ad revenue targeted at Danish media users by DKK 373 mio. in the last year.

4 Three observations in the media year

4.1 The platform and generation gap

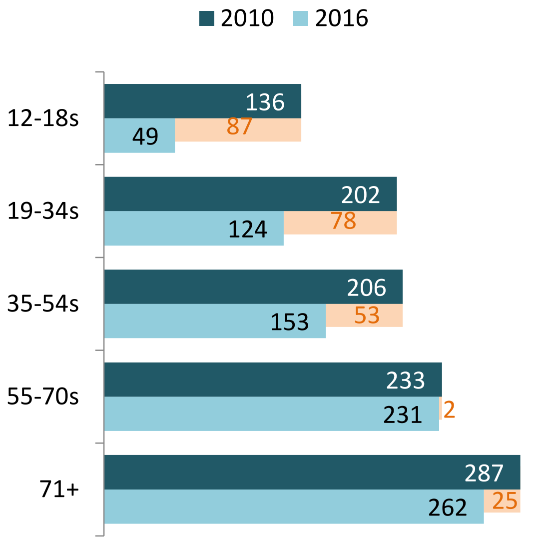
When it comes to the Danes' media consumption, age is a very significant factor. Young people are heavy users of internet-based digital services, while the older generation typically remains faithful to the conventional media.

Young people still watch conventional TV and read printed newspapers but there is a tendency for them to do this less often or for a shorter time than in the past.

Several conventional media suffer from falling reach and this trend is clearest among the youngest age groups.

Young people watch less conventional TV

Figure 14: Average daily viewing time in minutes



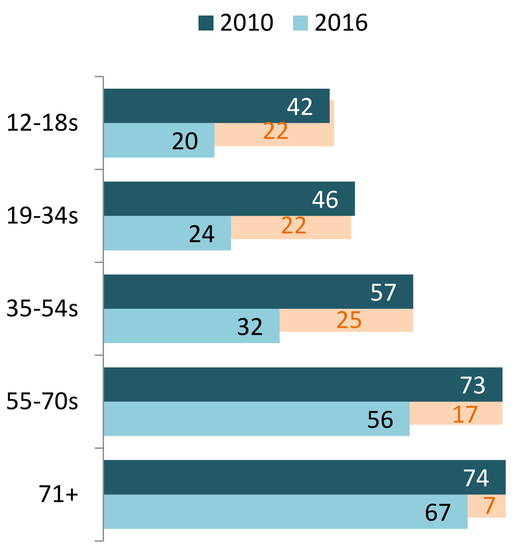
Source: Kantar Gallup TV-Meter

Some media usage is transferred to new platforms and devices as new technologies are developed and new digital services launched.

The graphics show Danes' consumption on individual platforms and streaming services as age step charts.

Newspapers reach fewer young people

Figure 15: Daily reach in % all newspapers



Source: Index Danmark/Gallup

First and foremost, the charts show that age is a decisive factor in the Danes' consumption of the different platforms and services – and also for these platforms' and services' reach in the Danish population.

Reach and consumption of conventional media, such as TV, printed newspapers and radio, are typically lowest in the youngest age groups.

By contrast, reach and consumption are greatest in the oldest age groups.

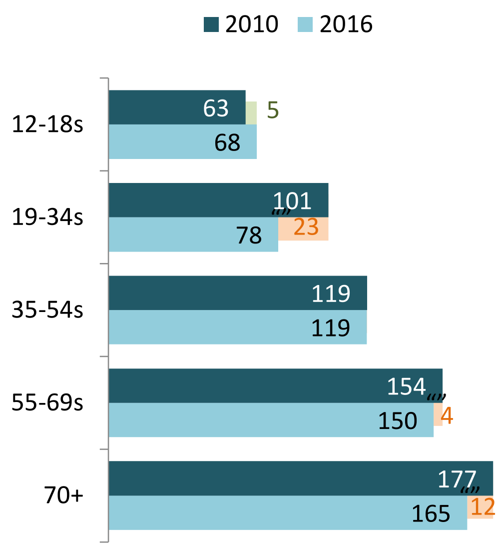
That age is significant to the Danes' media consumption is, however, nothing new.

There are therefore wide differences between the age groups' use of conventional media, such as TV, printed newspapers and radio, in both 2010 and 2016.

The disparities in media consumption, in particular TV and printed newspapers, between the different age groups have widened from 2010 to 2016. The steps on the graph have therefore become steeper because consumption and reach have diminished more for the youngest age groups whereas there is only a limited fall among the older age groups.

Very young people listen more often to the radio

Figure 16: Average daily listening time in minutes



Source: Kantar Gallup TV-Meter

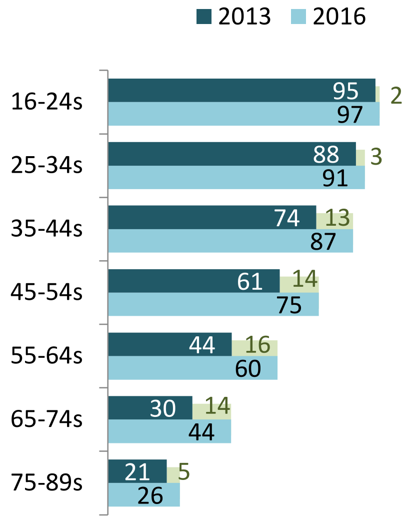
Age also plays a decisive role in the Danes' radio consumption. However, among the conventional media, radio constitutes an exception as radio listening increased among the youngest users and fell in all other age groups.

As illustrated by the age step charts, there is a tendency for conventional media reach to be greatest among the older segments of the population and least among the younger ones.

Where internet-based media and services are concerned, the reverse is true. The age step chart slopes the opposite way. The young are heavy users of the digital services while the older groups' use of these services is more limited.

More of us use social network services

Figure 17: Percentage share of internet users who use social network services



Source: Statistics Denmark – IT use in the population

For the digital platforms and services generally, the tendency is for usage and reach to increase in all age groups.

Growth is slowest among the youngest age groups, typically because reach and usage among the younger groups in the population are already very high.

Increases are typically greatest among the older members of the population because older segments are now adopting these services, although more slowly than younger groups.

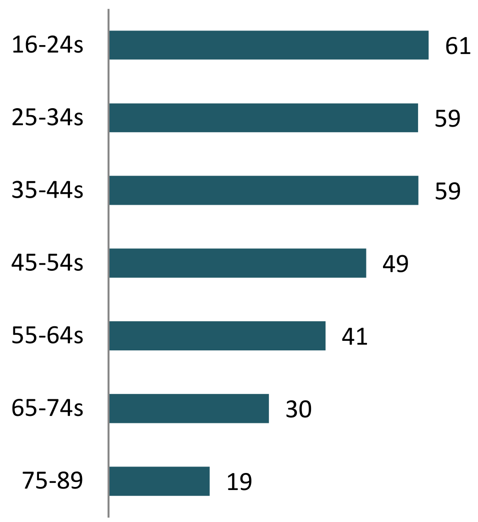
There are great differences between young and older people's use of the conventional and internet-based media, respectively.

For many services and platforms, however, it is not easy to spot a statistical generation gap. Over the years, there has evolved a gradual transition between the age groups, such that the trend is for a gradual shift away from the conventional media platforms towards internet-based media usage.

For some segments of the population, internet-based media usage may be a supplement to conventional media use whereas, for others, we can expect increasingly to see much conventional media use replaced by the internet-based platforms.

Young people stream TV from TV channels (e.g. DR TV, TV 2 Play)

Figure 18: Percentage share of internet users who stream TV from TV channels

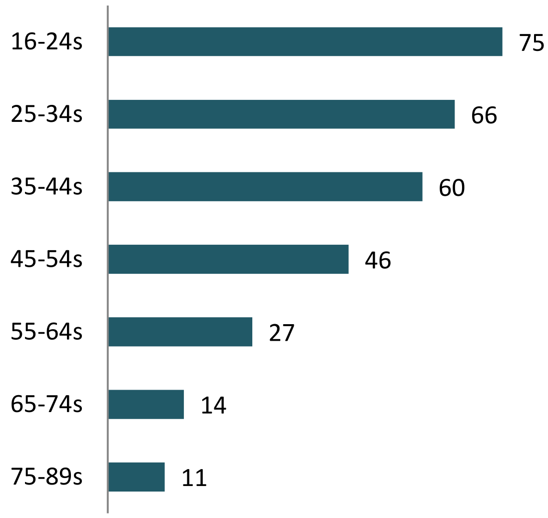


Source: Statistics Denmark – IT use in the population.

The developments described for different age groups' use of the new and old platforms and services do not occur, however, at the same rate.

Young people in particular stream from video on-demand services (Netflix, HBO and others)

Figure 19: Percentage share of internet users who stream from streaming services



Source: Statistics Denmark – IT use in the population.

There are great differences in the reach and usage of individual internet-based services among the population. Several conventional media continue to have a good following among the young and the elderly. Unlike earlier generations, the very young will possibly grow up without any degree of affinity with conventional platforms. Whether the young will ever adopt media habits in which conventional media play a key role, remains a moot point.

All the age groups are adopting new media and services all the time, albeit at different rates. Streaming service and social media reach are examples of this.

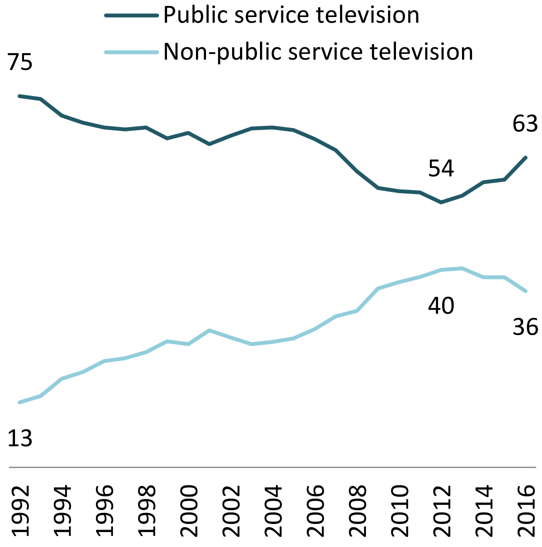
4.2 Public service developments across the media

In recent years, the public service media have been impacted by new players and platforms that simultaneously constitute new opportunities to develop and new competitive threats. For example, streaming technologies provide DR and TV 2 with a new communicative platform but also with a number of new competitors, e.g. US-based Netflix.

It is therefore reasonable to examine the extent to which the public service media are successfully maintaining interest in their established platforms (TV and radio) and how consumption of their content is developing online, including via streaming.

Public service share increasing in a shrinking TV market

Figure 20: Percentage share of total TV viewing

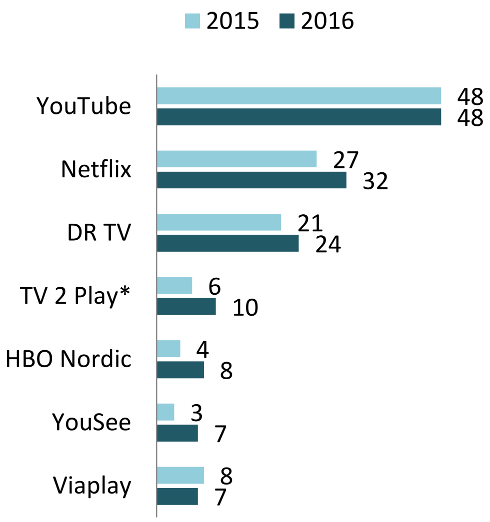


Source: Kantar Gallup TV-Meter

On average the Danes watch 2 hours and 38 minutes of conventional TV each day. In 2016, 63 % of TV viewing was on public service channels, which increased their share of viewing by 5 percentage points from 2015 to 2016 and by 9 percentage points from 2010 to 2016. The public service channels have achieved increases in a shrinking TV market, in which their share of total viewing is increasing only because TV viewing on commercial channels is falling. Danes generally – and the younger age groups in particular – now watch less TV. For example, in 2016 12-18s watched TV for 49 minutes a day, 87 minutes less than in 2010.

Public service streaming is limited but growing

Figure 21: Percentage share of population who stream weekly from ...



** NB: TV 2 Play includes TV 2 Networks (not a public service)*
Source: DR Media Development 2016; Kantar Gallup Index Danmark

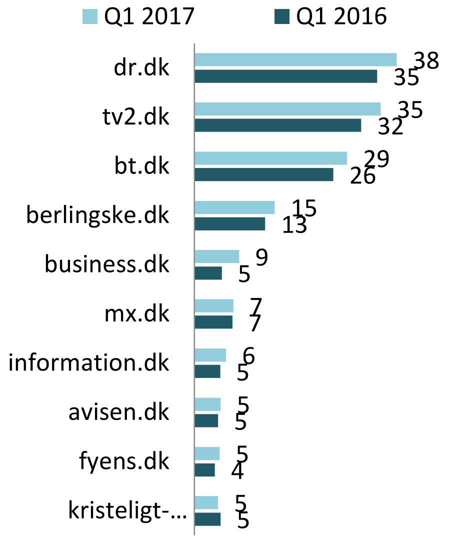
As for streaming, most stream weekly from YouTube and Netflix. As the public service media are not leading players in streaming, it makes good sense to examine the gradual development of the different media: DR and TV 2 Play (including channels that have no public service obligations) have succeeded in increasing their share of viewers who stream weekly from these media, i.e. by 3 and 4 percentage points respectively from 2015 to 2016. Netflix achieved the largest increase in market share of viewers who stream weekly; almost one in three Danes now uses Netflix on a weekly basis.

While the public service media compete primarily with international streaming services within streaming, the established Danish newspapers are the other major group of players when it comes to Danish internet-users' use of internet news sites.

dr.dk and tv2.dk (neither solely a news site) achieved 38 % and 35 % reach respectively in Q1 2017 and therefore reached most Danish internet users on a weekly basis. Both media have succeeded in increasing reach by 3.7 percentage points in the last year, the biggest increase among the major news sites.

High public service reach on the internet

Figure 22: Average weekly reach (%)



Source: Dansk Online Index/Kantar Gallup

(NB: JP/Politikens Hus media are not included in official statistics from Dansk Online Index.)

Meanwhile, page views present a more nuanced picture. The number of page views on bt.dk (166 million page views per month in Q1 2017) significantly exceeded those on dr.dk (132 million) and tv2.dk (113 million).

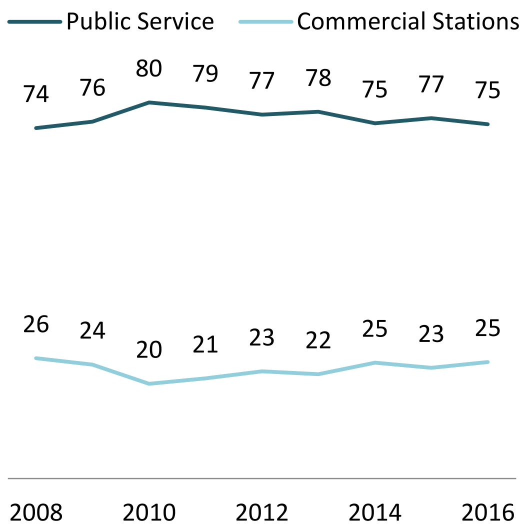
In radio, the public service stations (DR's stations and Radio24syv) continue to dominate with a 75 % share of total listening in 2016.

This is, however, a 1.2 % drop from 2015, which is due to a 4.1% fall in listening to P3.

If we exclude the DR stations, Radio24syv achieved its highest listening share since its launch in 2011 (2.7 %).

Slight fall in public service share of radio listening

Figure 23: Percentage share of total radio listening



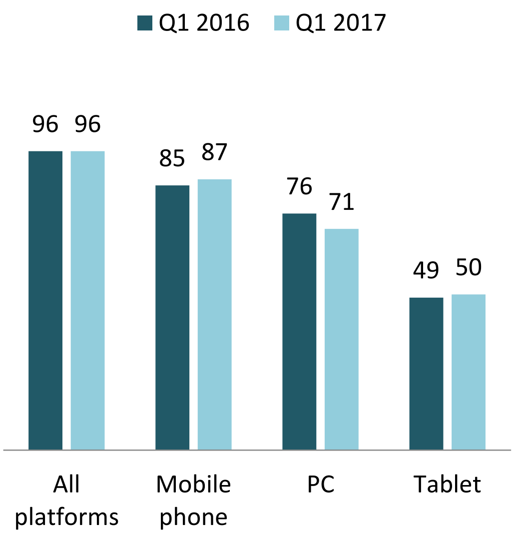
Source: Kantar Gallup TV-Meter

4.3 Internet use goes mobile

An impressive 96 % of internet users (aged 7+) visits one of the sites measured by Dansk Online Index on a monthly basis, although internet users access them from different devices. From 2016 to 2017, there is a fall in monthly reach from a PC. Where PC reach was 76 % in 2016, this has fallen to 71 % in 2017.

Mobile site access is increasingly popular

Figure 24: Average monthly reach

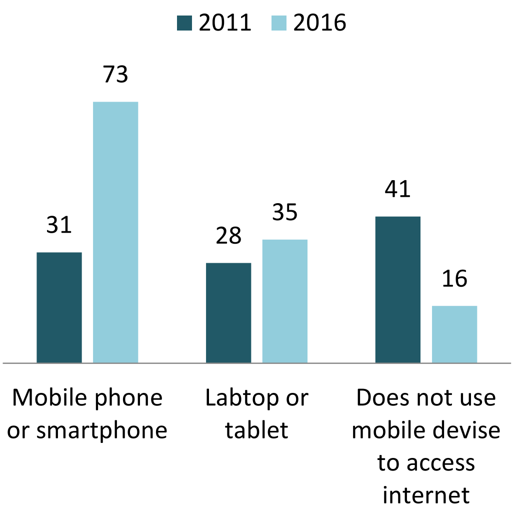


Source: Dansk Online Index/Kantar Gallup

During the same period, the use of mobile devices has become more widespread in the population. Mobile phone (smartphone) reach increased from 85 % in 2016 to 87 % in 2017. Tablet increased in the same period by a single percentage point to 50 %. The age profile shows that there is a relatively large reach (about one third) of both types of mobile devices (mobile phones and tablets) among the 35-54s, whereas these devices reach fewest members of the youngest group (7-18s) and the oldest group (71+) (about one tenth of each group). Identical development is seen for the number of page views on these devices. In Q1 2017 the average number of monthly page views on a mobile device increased by 24 % compared to Q1 2016.

More of us have mobile access to the internet

Figure 25: Share of users that access the internet
from mobile devices



Source: Statistics Denmark – IT use in the population

This is confirmed by developments in media use for the devices from which Danes access the internet. In 2011, an almost equal number (28 %) of Danes used a laptop or tablet to access the internet away from home and workplace as there were Danes who used a mobile phone or smartphone to do the same (31 %). By contrast, there were many more that did not use the internet at all from mobile devices (mobile phone, smartphone, laptop, tablet) when they were neither at home nor at work (41 %).

This pattern is reversed in 2016. Internet access from a mobile phone or smartphone has more than doubled so that almost three quarters of the population (73 %) accesses the internet from these devices.

The obvious explanation is that many more families now have smartphones. Indeed, the share of families with smartphones has increased from 50 % in 2011 to 83 % in 2016.

Moreover, a report entitled "The Danes' sources of information and news and how they create their own media repertoire" prepared by Mindshare for the Danish Agency for Culture and Palaces, indicates that younger people in particular feel it is important that they can access the content they want wherever and whenever they like. For example, more than one quarter (28 %) state that they agree wholeheartedly or partly that brief news updates on a mobile device are sufficient to meet their need for news.

You can read a summary of this report at the end of this chapter.

5 This year's special reports

In recent years, six special reports have been 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.

5.1 Local and regional media content, role and importance in local communities

On a backdrop of the dwindling print runs, advertising and readership that local and regional media have suffered for some years, analysts from the Danish School of Media and Journalism conducted a survey into the state of these media. Their condition was evaluated from the perspectives of their journalists and editors and based on news content in local and regional media – and from the general public's point of view.

The survey shows that journalists and editors at 28 selected media in Esbjerg, Fredericia and Northern Funen (representing a large and medium-sized town and a small provincial community, respectively) are committed to the local area at a professional and personal level of interest, but only half of the news they publish is about the newspaper's local area or region.

The report concluded that local and regional media journalism has no distinctive profile and, with regard to their local area, it is neither very critical nor investigative, explanatory or particularly partisan. In short: the media settles for informing readers of what is going on.

5.2 The impact of media mergers on local and regional media strategies and content

Since the 1990s, local and regional media have grouped via a series of mergers and acquisitions to form an ever smaller number of companies. In the most recent merger in 2015, a number of regional media merged to form what is now Denmark's second-largest media group, Jysk Fynske Medier. Against this background, a team of analysts from the Danish School of Media and Journalism studied the consequences of the merger for the local community coverage of the media directly involved in it.

The survey revealed that the merger was motivated by a desire to unite companies whose tasks were identical in order to achieve synergies and a stronger capital base.

Like the first report, this report focused on Esbjerg, Fredericia and Northern Funen, although, in this case, as representative of different locations, i.e. at the core, semi-periphery and periphery of the merger. It transpired that, following the merger, the media's coverage of Esbjerg (the core of the merger) is now the source of a relatively larger share of news (e.g. local news) than Fredericia and Northern Funen.

5.3 The Danes' sources of information and news and how they create their own media repertoire

How do Danes use news and current affairs content and how do they create their own media repertoire? What lies behind and motivates their choices – and how do these factors correlate with demographic/socio-economic profiles and education? These were some of the questions Mindshare focused on in its report.

The report showed that the Danes' access to and use of the media, platforms and content are diverse and that their choices are motivated in many different ways. Young people are less dependent on individual platforms whereas the elderly regard conventional platforms as more reliable. Behaviour and beliefs divide the Danes with regard to the opportunity to remain updated at all times. Different media meet different needs.

Finally, by means of a general knowledge test, the report identified six segments with different motivations for using news and current affairs material: *The Superficial (17 % of Danes), the Well-informed (22 %), The Interested (20 %), The Disinterested (8 %), the Socially-correct (10 %), The Dutiful (21 %).*

5.4 Social media usage in 2016

In its report the Danish Agency for Culture and Palaces focused on how Danes use the social media. The report highlighted four main observations:

- **Children influence how their parents use the social media:** 82 % of people who live in a relationship *with* children use Facebook, whereas this applies to only 60 % of couples without children.
- **Social media use varies between income groups:** For example, Facebook and Instagram are more popular in the low income group, while Twitter is more widely used in the high income group.
- **Young people are social media heavy users:** Not surprisingly, 16-24s are the heaviest users of all the social media. 94 % of them use Facebook at least once a week, making Facebook far and away the most popular social media.
- **More people now use more than one social medium:** In 2016, 67 % accessed two or more social media during the course of a week, which is an increase from 62 % in 2015. 17 % access four or more social media.

Seen across the population as a whole, Facebook is the most widespread of the social media: 66 % of 16-89s use Facebook at least once a week, whereas 21 % use Snapchat, 20 % Instagram, 11 % LinkedIn, 6 % WhatsApp, 5 % Twitter and 4 % Pinterest. Among the 35-89s, from 2014-2016, there are 7-15 percentage point increases in the share that uses social media.

5.5 The Danes' use of ad blockers

As a result of developments in recent years, the media are now increasingly dependent on digital revenue, including digital advertising. The new sources of content finance are now impacted by the advent of ad blockers, i.e. software that somehow blocks for advertisements on the internet.

The Danish Agency for Culture and Palaces’ report, "The Danes' use of ad blockers" focuses on ad blocker penetration and users' motivations for using them. Among others, the report emphasises the following:

- **Ad blockers are mainly used on PCs:** 33 % of internet users use ad blockers on a PC, compared to 15 % and 12 % respectively for smartphone and tablet.

- **The use of ad blockers is unevenly distributed:** Younger internet users use ad blockers most. Men use ad blockers significantly more than women.

The most important reasons for using an ad blocker on an electronic device are i) to avoid pop-up advertisements, ii) that ads take up too much space on the internet and iii) that being badgered on the net by ads for things one has searched for is annoying.

5.6 Media industry finance and employment

Digital development and structural upheaval in the media market in recent years have brought challenges and impacted the media's finances. For example, a significantly larger share of advertising revenue goes to foreign players and conventional print media have had their work cut out to generate digital revenue. The Danish Agency for Culture and Palaces’ report, "Media industry finance and employment" focused therefore on the Danish media's capacity to adapt to developments in the market. In the period 2008-2014, the media industry generally saw a decline in revenue of DKK 3.2 billion. The industry has however succeeded in improving after-tax profits and equity.

- After-tax profits for the media industry (excluding TV) increased from DKK 773 million in 2011 to DKK 802 million in 2014.
- Total media industry (excluding TV) equity increased from DKK 4.6 billion in 2008 to DKK 4.9 billion in 2014.

Success is explained partly by ongoing adjustment of operating costs, most clearly apparent as workforce reductions in several branches of the industry: In 2014, the media industry employed 25,023 people, which is 1,552 fewer than in 2008. Workforce reductions have affected the printed media in particular, while employment in TV and independent journalism has increased. Overall, these adjustments have improved value growth per man-year in the period 2008 to 2014.

6 Method

To read about the methods used, read the method description in each chapter (only available in Danish).

- TV
- Radio
- Newspaper/print
- Internet traffic
- Internet use and devices
- Advertising revenue in Denmark and to foreign players

For detailed information about the methods used, see the "Report on media development in Denmark 2017" website:

http://slks.dk/mediernes-udvikling-2017/om-rapporteringen/metoder/

7 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, Kantar Gallup) must be cited.

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

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8 List of figures